Communications Platform Team:  
Project Charter

Section 1 – Build the Project Team

Project Sponsors
Champions the project at the administrative level of the Library. Work with the project team to achieve project outcomes and provide resources and support.
Associate University Librarians

Project Leads
Lead the team to achieve the deliverables of the project as described in the Charter.
Jessica Cahill-Bouzane
Janet Goosney

Project Team
Darby, Karen
Hillier, Jackie
Fry, Susan
Holloway, Nicole
Lawlor, Tina
Little, Gordon
Malone, Meaghan
Shore, Kate
Swab, Michelle

Problem Statement:

“Our users need easy-to-access help at the point-of-need. We have an opportunity to reimagine how our users can get that help by implementing a new communication platform, focusing on enhancing our chat reference. Enhanced chat reference would allow users to get help from within databases, ask questions by text, and through social media. The communications platform may also allow us to simplify email communication with users to ensure that they get a timely answer by the best people. The new communications platform will help us reach our goal to ‘enhance access, as well as the user experience of online resources, services, and collections.’ We will be able to measure the impact through quantitative and qualitative analysis of pre and post implementation data.”

Section 2 – Initiating and Defining the Project

Project Description
Using the **Problem Statement** draft a high level statement that answers “why” the project is being undertaken. Include in this section a reference to the portion of the MUN Libraries strategic plan the project addresses and describe the project’s purpose, scope and deliverables.

This project is being undertaken in order to “enhance access, as well as the user experience of online resources, services, and collections.” Through launching a new chat service, Memorial University Libraries will “be able to measure the impact” that chat has on our users “through quantitative and qualitative analysis of pre and post implementation data.” Memorial University library patrons need “easy-to-access help at the point-of-need” through a communication platform that gets users answers as quickly as possible. We want our patrons to know that someone at Memorial University Libraries is there to assist them with their library needs; and a new chat service will help achieve this by making help available to clients on more technology formats than our current chat service. The platform must be approachable, easy to use, and compatible with multiple communication technologies (e.g. web-based chat, text, email) and research tools (e.g. OneSearch, databases, etc.). Promotion to users and staff orientation will help to ensure an easy transition to the new service.

This project reflects back to the Memorial University Libraries strategic plan by supporting the following points:

(Under **Teaching, Learning & Research**)

“Revitalize services and space to reflect our diverse community and the changing environment of teaching, learning, and research” by providing “…technology-enhanced services and spaces”.

“Enhance access, as well as the user experience of online resources, services, and collections”, by “target[ing] efforts to simplify the online user experience.”

“Enhance communications for greater impact with researchers, faculty, and students” by using “strategic communication approaches to consult, collaborate and inform.”

(Under **Community and Professional Relationships**)

“In recognition of our special obligation to the people of Newfoundland and Labrador, commit to expanding engagement with the public” through improved online communication.

“Strengthen partnerships through focused and relevant communication” by “proactively identify[ing] opportunities for dialogue and exchange with our external communities.”

(Under **US**)
“Align digital...spaces to demonstrated and anticipated workflow needs” by “align[ing online] public space to program and service provision.”

“Increase engagement through meaningful communication” by “ensuring consistency and clarity in all internal communications” via the communications platform dashboard.

## Project Deliverables

Using the **Goal Statement** draft the project deliverables. These are more specific or detailed statements that describe the tangible deliverables that the project is expected to produce.

When crafting deliverables think of SMART.

- **Specific**: Define deliverables clearly, in detail and think of 6 w’s (who, what, when, where, why, which);
- **Measurable**: Identify the measures and performance indicators that will be used to determine whether the deliverables have been met, (metrics and milestones, how much, what percentage);
- **Achievable**: Ensure each deliverable, as outlined, has a reasonable expectation of being successfully completed (do you have skills and tools to accomplish the deliverable); Be realistic about what is achievable and ensure each deliverable aligns with the project description;
- **Time-bound**: include the date or specific period by which the team expects to achieve each deliverable (what are the timelines)

### External Deliverables *(relate directly to service delivery to library users)*

- Select and implement a new library communications platform designed to improve public service-related communications for all library patrons.
- Develop and implement an on-line and university-wide promotion strategy to ensure patron awareness and promote use of the new product.
- Gather feedback from library users regarding perceived value and ease of use of the new product.

### Internal Deliverables *(relate to internal operations; may indirectly impact library users)*

- Select and implement a new library communications platform designed to public service-related cross-branch collaboration and communication across Memorial Libraries.
• Coordinate with LITS to establish technical implementation processes and timelines.
• Develop and deliver an information and training framework for all employees who will be using and providing patron services via the communications platform.
• Develop and implement an evaluation strategy that gathers feedback from internal and external users, examines use data, and compares use data with that of earlier products and solutions.

Section 3 – Planning the Project

Stakeholders

Through a Stakeholder Analysis identify individuals, groups, or organizations that may affect, or be affected, or perceive itself to be affected by, the deliverables of the project.

External Stakeholders

• Online students of Memorial University
• On-campus students of Memorial University
• Faculty and staff of Memorial University who are external to the library
• Guest patrons who are external to Memorial University; these users may be local, or located anywhere in the world
• Staff of CITL involved in the administration of Brightspace and/or design of online courses

Internal Stakeholders

• Employees who are presently involved in the delivery of chat reference services
• Employees who are involved in the delivery of public services, but are not presently involved in the delivery of chat reference services
• Employees of Library IT Services (LITS)
• Library Administrators
**Risks & Risk Mitigation**

From the *Stakeholder Analysis* identify events or conditions which have a probability of occurring and which present an opportunity or threat to the project. Draft a risk response strategy whereby the project team acts to decrease the probability of occurrence or impact of a threat.

<table>
<thead>
<tr>
<th>Risks</th>
<th>Mitigation</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Product expense</strong></td>
<td>Cost-efficiency and relative product value will be considered as evaluation criteria when reviewing, testing and ranking product options.</td>
</tr>
<tr>
<td><strong>Delays during product testing &amp; selection</strong></td>
<td>Product testing and selection will be guided by formal evaluation criteria and processes to facilitate independent assessment by committee members, in order to make this stage as seamless and efficient as possible despite the summer timeline.</td>
</tr>
<tr>
<td><strong>Delays during external processes, such as IT governance approval and vulnerability assessment</strong></td>
<td>We will allow generous timelines for these processes in order to avoid unanticipated time delays on the administrative or information technology end.</td>
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<tr>
<td><strong>Delays during technical implementation</strong></td>
<td>Through the LITS representative on the Communications Platform committee, we will work closely with that unit to maintain open lines of communication and to ensure that appropriate timelines are provided for technical implementation.</td>
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<tr>
<td><strong>Post-implementation service challenges as library employees get to know the new product</strong></td>
<td>Ample training and support will be provided to employees prior to product implementation, in order to ensure that they are well-trained and comfortable using the new system. As training will take place during the summer, flexibility will be built-in to accommodate employee schedules.</td>
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<tr>
<td><strong>Patron dissatisfaction or a lack of patron uptake of the new service</strong></td>
<td>A marketing and communication plan will be developed to help raise patron awareness. Usability testing will help to reduce the risk of patron dissatisfaction.</td>
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<tr>
<td><strong>Unavailability of a product that meets all of our identified selection criteria.</strong></td>
<td>We will do due diligence as a team to come up with the best available solution for communications platform for Memorial’s library patrons. If we are not able to find a product that meets all of our selection criteria, we will try to address as many as possible, with the end goal of providing great service.</td>
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Not Part of the Defined Project
Identify work (features, functions, and deliverables) that is not included in the project or is determined to be outside of the project.

- Vulnerability assessment and technical implementation are not part of the defined project in that this work will not be completed by the project team, but by units outside of the project. However, our team will coordinate with Library IT Services as this work is taking place, and will ensure that the time needed for those essential processes is accounted for in our timeline.

- Post-implementation, long-term administration and maintenance of the communication platform is outside the scope of this project. The committee will produce recommendations for operationalization and maintenance based on our experience and knowledge of the product. Operational processes will ultimately be defined by the needs of various public services groups, and should focus on on-going, cross branch/unit collaboration.

- If the new product is very successful and the increase in user uptake is significant, public service units may need to examine existing workflows and staff allocations in order to meet these service demands. Those evaluations and decisions are longer-term and will be made within the affected units, preferably with cross-library collaboration and support.

Timelines
From the Project Deliverables provide a list of activities or events to complete the deliverables, in chronological order.

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<table>
<thead>
<tr>
<th>Activity</th>
<th>Complete by</th>
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<tbody>
<tr>
<td>Submit project charter to Portfolio Group</td>
<td>27th March 2019</td>
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<tr>
<td>Create sub-groups &amp; assign tasks</td>
<td>April 2019</td>
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<tr>
<td>Develop project evaluation plan</td>
<td>April 2019</td>
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<tr>
<td>Develop and submit IT Investment proposal</td>
<td>May 2019</td>
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<tr>
<td>Develop communication &amp; promotion plan</td>
<td>May 2019</td>
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<tr>
<td>Develop a “wishlist” of desired features</td>
<td>May 2019</td>
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<tr>
<td>Consult with internal stakeholders regarding wishlist</td>
<td>May 2019</td>
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<tr>
<td>Identify potential products for consideration</td>
<td>June 2019</td>
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<tr>
<td>Develop product evaluation instrument(s)</td>
<td>June 2019</td>
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<td>Activity</td>
<td>Time</td>
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<tr>
<td>Set up product trials and/or vendor demos</td>
<td>July/August 2019</td>
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<tr>
<td>Test and evaluate potential products (may involve stakeholders)</td>
<td>Sept./Oct. 2019</td>
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<tr>
<td>Make product selection/recommendation</td>
<td>November 2019</td>
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<tr>
<td>Prepare interim/product selection report</td>
<td>Nov./Dec. 2019</td>
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<tr>
<td>Coordinate with LITS on technical approval and implementation</td>
<td>Winter 2020</td>
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<tr>
<td>Develop training plan</td>
<td>Winter 2020</td>
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<tr>
<td>Provide staff training &amp; support</td>
<td>Spring/summer 2020</td>
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<tr>
<td>Announce new product</td>
<td>Summer 2020</td>
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<tr>
<td>Do “soft launch” with concurrent testing and evaluation</td>
<td>Summer 2020</td>
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<tr>
<td>Do “hard launch” of new product</td>
<td>September 2020</td>
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<tr>
<td>Provide user support and/or training, as required</td>
<td>Fall 2020</td>
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<tr>
<td>Engage in post-implementation evaluation</td>
<td>Winter 2021</td>
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<tr>
<td>Develop final report, including recommendations for operationalization</td>
<td>Winter 2021</td>
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**Resources**

Describe the resources necessary to complete the project. This could include funding, training, technology and staffing (both internal to the library resource requirements and identification of any additional expertise).

1. **Funding**

   • Funding to cover the cost of the new communications platform.
   
   • New technology may also need to be purchased to implement or support implementation of the new platform.
   
   • Travel funds may be required in order to bring the Ferriss Hodgett representative to St. John’s for special project events and/or activities.
   
   • Travel funds may also be needed to allow committee members to make site visits to libraries where the selected product has been implemented.

2. **Time**

   • Team members require time in order to attend meetings and contribute to the work of the committee.
   
   • LITS will require that an appropriate amount of time be provided for technical approval and
implementation of the new product.

- Library employees using the product will require time to build familiarity and comfort with the new product, and to adapt to any changes it might introduce to their workflow.

3. People & Expertise

- Information technology expertise will be needed in order to implement, troubleshoot, and maintain the new product. We are therefore fortunate to have LITS representation on the committee.

- Effective marketing and communications will be vital to the success of our new product. We are grateful to have the support and expertise of the library Communications Coordinator available to us via the Portfolio Group.

- We will be seeking the help of students in order to test and evaluate our selected product. Some of our committee members are in a position to help us identify and recruit student testers.

4. Statistics

- We will need to access relevant data generated by and about our current chat service in order to fully evaluate and assess the comparative success and cost effectiveness of the new product.

Communication
Describe how, when, and by whom information about the project will be managed and disseminated to the Library and other stakeholders. Identify regular updates to Portfolio Group; regular updates to Library and other stakeholders. A “kick-off” meeting for a project is the initial communication event.

1. Portfolio Group & Joint Teams:

- Project team leads, along with other members of the Communications Platform Team, will meet monthly (or as needed) with the Portfolio Group. Team leads and/or members will also communicate with Portfolio Group members as necessary.

- Project team leads will attend Joint Team meetings, by invitation, in order to provide periodic updates.

2. Library employees:

- A communication and promotion plan will be developed that will include regular updates to all
internal stakeholders.

- In some cases library employees from specific stakeholder groups or units (e.g. LITS; library branches/units not represented on the committee) will be consulted directly and/or invited to CPT meetings.
- Training and support will be provided to all library employees who will be using the new product.

3. Memorial students, faculty & staff:

- A communication and promotion plan in order to market the new product to Memorial students, staff and faculty, and promote awareness, adoption and use.
- If needed, orientation opportunities will be made available to Memorial students, staff or faculty.

4. Stakeholders external to Memorial University:

- The communication and promotion plan will also consider patrons external to the university, for example by providing information about the new Service on News and Events and Ask Us sections of the library website.

**Reporting to the Sponsors**

Draft a statement about how, when and by whom the status of the project will be reported to the Sponsors. Reporting will be aligned with the project dashboards (TBA) and will be used to inform the Portfolio Group and the University Librarian about progress as per the deliverables.

- Status updates will be reported to the sponsors (Associate University Librarians) by the team leads through regular correspondence via email, phone conversations, monthly meetings with the Portfolio Group, and invited meetings with Joint Teams.
- Communications with the project sponsor(s) will be reported back to the project team members by the team leads.