# Interactive Design Project Charter Template

**Purpose:** To disseminate information learned during initial planning stages to the project team, ensuring that all parties involved have similar understanding of the goals, objectives, approach, budget and timeline for the project. This document will be updated as the project progresses through its lifecycle.

**Input**: Comes from all Intake Discussions + forms, Strategy Estimation which is now completed by strategy team so they have also received intake meeting recording, SOW

| **PROJECT BUDGET BREAKDOWN - [PM]**<br>*The cost estimates provided below were used to develop a ballpark estimate for this client. Include any notes re: any decisions or assumptions made* | |
|---|---|
| **All-In Funding** | $XXX,000 |
| **Strategy + Planning** | |
| **Photography** | |
| **Content, SEO, Writing, Analytics** | |
| **Interactive Design** | |
| | |
| **STATEMENT OF WORK COST ESTIMATES- [PM]**<br>*The cost estimates provided below were used to develop a Statement of Work, approved by this client.* | |
| **Strategy + Planning** | [link] |
| **Implementation** | [link] |
| **Photography** | [link] |
| **Change Order(s)** | Please [link] to all change orders |

| **PROJECT TIMELINE DETAILS- [PM]** | |
|---|---|
| **Launch Timing** | *If a desired launch timing is expressed by the client, denote here with reasons below.*<br><br>*Soft Deadline = Desired launch, would be best*<br>*Hard Deadline = something must happen on a specific date. Reason to be denoted under business driver.*<br>*No deadline = no reason to launch at a specific time* |
| **Business Drivers** | *Launch to be timed with certain event or business cycle/academic semester* |

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|---|---|
| **Strategy** | *Aiming to be completed by XX/XXXX in order to allow for YY months to design, build and launch new site.* |
| **Implementation** | *To allow for XX months of design, development and testing, including client review/vacation periods, this project must start:*<br><br>*MONTH XX/XXXX* |

| **PROJECT DETAILS - [PM/AE]** | |
|---|---|
| **Overall Client Request - [AE]** | *What is the main issue/problem we are trying to solve with a redesign? Why is the client looking for in a redesign?*<br><br>*Link Client Intake Meeting, if recorded* |
| **Project Approach - [PM]** | *Define the type of strategy required (full, abbreviated, adding user research, etc)*<br><br>*Define the type of implementation (ie, this is likely going to be a fully out of the box site, or this site will be looking for some heavy custom functionality, requiring a new feature we are building via the product roadmap)* |
| **Initial Client Project Requirements - [PM]** | *'Site should remain simple, without custom dev'*<br><br>*'Client is very interested in ease of back end functionality'.* |
| **Known Business / Content Goals and Metrics - [PM]** | *Copy from SOW.*<br>*Add any additional color commentary as necessary*<br>*Must-have: functionality, content requests* |
| **Project Constraints - [PM]** | *Fiscal Year (ie, only spend 75k of their 200k budget in FY23)*<br><br>*Hard Deadline (ie, must be live for start of new academic year/recruiting cycle/admissions deadline)*<br><br>*'Site is on Responsi 1.x; Design work is limited to bare minimum changes. Must upgrade to newer responsi if new design is required'*<br><br>*Is the deadline more important than the budget? Budget more important?* |
| **Approval Process - [AE]** | *How will the ID + client team(s) work to gain decision makers' approval effectively?* |

| CLIENT BACKGROUND INFORMATION - [AE] | |
|---|---|
| **Department/School Background:** | *Who is this client? What do they do for the University?* |
| **Original Site Launch Date(s)**<br><br>**Launch Date Tracker** | *If site exists, when did it launch?* |
| **Analytics** | *What level of interest?*<br>*What comfort level?*<br>*Do they have staff to support any metrics reporting on their own?* |
| **SEO** | *What level of interest?*<br>*What comfort level?* |
| **Stakeholder Analysis** | *What can you tell us about the stakeholders and why they've been chosen to represent the needs of the client.*<br>● Stakeholder 1; Title, Why<br>● Stakeholder 2; Title, Why<br>● Stakeholder 3; Title, Why<br>● Stakeholder 4; Title, Why<br>● Stakeholder 5; Title, Why |
| **Decision Maker** | *What do we need to know about this decision maker? Why were they chosen? Will we need to prep anyone on the team ahead of going into a decision making meeting?* |
| **Approval Process** | *What will the process be to lead us through buy-in and approval?* |
| **Audience Analysis** | *What can you tell us about the audience? What do they come to the site for? How do they use it?* |
| **Client Constraints** | *Are there specific points in time when this client is unavailable? Or should we avoid client-heavy portions of the project at a certain date?* |
| **Peer Site / Competitive Landscape** | *{Insert link to Peer Site documentation}* |

| STAKEHOLDER GROUP ANALYSIS |
|---|
| This section seeks to identify our approach to each interview we will plan, and helps ensure that the stakeholders involved will be able to help CS obtain as much useful, tactical information and strategic direction as possible about the site and content needs, in order to make the best recommendations possible as our next step in our process.<br><br>Please consider the information in the table seen below as critical in ensuring that we work together, with our clients, to identify the most helpful stakeholders possible, and that we all understand their reason for participating, based on their:<br><br>1. Role within the organization; |

2. Relationship they have with the website (i.e. are they a content manager, contributor and/or project approver?);
3. Knowledge of challenges to be addressed/areas of the site where enhancements are needed.

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**Account: The following table can be utilized if you have a more complex set of stakeholder interviews to manage / document.**

| | | |
|---|---|---|
| **Discussion Group 1**<br>Key Contacts<br><br>*This group is the most directly connected with the key target external audiences of prospective students, current students, alumni, and donors, etc.* | INTERVIEWEES:<br>1. **Stakeholder 1** (Title)<br>2. **Stakeholder 2** (Title)<br>3. **Stakeholder 3** (Title)<br>4. **Stakeholder 4** (Title) | **Stakeholder 1** can speak to the needs in terms of outreach to prospective graduate students. Her team also works directly on the site maintaining the graduate admissions pages.<br><br>**Stakeholders 2, 3, & 4** can speak to the needs in terms of prospective students. Their team also works directly on the site to maintain the student facing pages.<br><br>**Stakeholder 5** can speak to the needs of the site as far as reaching donors and alumni. Her team does not directly update the site. |
| **Discussion Group 2**<br>Group name<br><br>*This group each have related content areas on the current site that are in various stages of development and which will need to have representation on the new site.* | INTERVIEWEES:<br>1. **Stakeholder 1** (Title)<br>2. **Stakeholder 2** (Title)<br>3. **Stakeholder 3** (Title)<br>4. **Stakeholder 4** (Title) | Their audiences are faculty (**Stakeholder 1**); community partners (**Stakeholder 2**); faculty & student research (**Stakeholder 3**); all-college (**Stakeholder 4**).<br><br>In particular, the XXX section of the site contains resources, events, and other content. The associate deans can also speak to the overall strategy for the college as it relates to their areas. |
| **Discussion Group 3**<br>Group Name<br><br>*This group has insight on how the academic programs are represented on the website.* | INTERVIEWEES:<br>1. **Stakeholder 1** (Title)<br>2. **Stakeholder 2** (Title)<br>3. **Stakeholder 3** (Title)<br>4. **Stakeholder 4** (Title) | Their main audiences are prospective and current students. They can also add to relevant and important research of department faculty and students |
| **Discussion Group 4**<br>Group Name<br><br>*Can speak to our academic offerings and the breadth and depth of the curriculum and academic programs for undergraduate and graduate students.* | INTERVIEWEES:<br>1. **Stakeholder 1** (Title)<br>2. **Stakeholder 2** (Title)<br>3. **Stakeholder 3** (Title)<br>4. **Stakeholder 4** (Title) | **Stakeholders 1, 2, and 3** can be thought-partners in how we reach current and prospective students and the information they need to have access to.<br><br>**Stakeholder 4** can speak to the needs of the site regarding events and external partner outreach. Her audience is all-college, including alums and external audiences. She sends occasional emails. |
| | LISTENERS: | [justification for sitting in on interviews] |

| | | |
|---|---|---|
| | - | |
| **Discussion Group 5**<br>Analytics Conversation<br><br>*The people who are most closely connected to the measurement strategy.* | INTERVIEWEES:<br>1. **Stakeholder 1** (Title)<br>2. **Stakeholder 2** (Title)<br>3. **Stakeholder 3** (Title)<br>4. **Stakeholder 4** (Title) | This group is composed of the main project team. **Stakeholders 1, 2, and 3** are the people who are most closely connected with the content strategy and development. They are also the people who work the most closely/regularly with the back end of the site. They are the team that manages website analytics and SEO as well as email and social media.<br><br>Dean Chard and Mariana are the leadership project sponsors and can speak to the overall strategy for the project and for the college. |
| | LISTENERS:<br>- | [justification for sitting in on interviews] |

## BASELINE PROJECT SCHEDULE

| Task Name | Start | Finish |
|---|---|---|
| **GLOBAL PROGRAMS SUITE: REDESIGN** | **07/22/22** | **11/04/22** |
| *Project Intake* | *07/22/22* | *08/10/22* |
| Findings + Recommendations | 08/11/22 | 11/04/22 |
| | | |
| **GLOBAL PROGRAMS (SITE SPECIFIC)** | 11/07/22 | 03/27/23 |
| Site Map Development | 11/07/22 | 02/10/23 |
| Wireframe Development | 01/03/23 | 03/27/23 |
| | | |
| **STUDY ABROAD** | **12/15/22** | **12/15/22** |
| Kickoff Meeting | 12/15/22 | 12/15/22 |
| Site Map Development | 12/19/22 | 02/15/23 |
| Wireframe Development | 02/06/23 | 05/03/23 |
| | | |
| **CELOP** | **02/02/23** | **02/02/23** |
| Kickoff Meeting | 02/02/23 | 02/02/23 |
| Site Map Development | 02/06/23 | 03/30/23 |
| Wireframe Development | 03/21/23 | 06/15/23 |
| | | |
| **ISSO** | **03/17/23** | **03/17/23** |
| Kickoff Meeting | 03/17/23 | 03/17/23 |
| Site Map Development | 03/21/23 | 06/12/23 |
| Wireframe Development | 05/17/23 | 08/29/23 |