Form 1: PROJECT CHARTER

Project Name: Telephone System Replacement
Charter Date: December 15, 2009
Charter Author(s): Kerry Nielan

Idea Incubation: (Yes or No. Did this project arise from the Idea Incubator process? If so, attach those documents.)
No

Problem Statement (Describe the problem or situation that this project addresses. Provide some background if appropriate. What is the compelling need?)
Our current phone system and configuration has multiple problems:
- The equipment is old and does not function properly. Phones have buttons that don’t work, voicemail systems have ceased working, lines have static on them, dropped calls.
- There are separate systems at each branch that are not integrated
- We have at least 4 different configurations/type of hardware
- No unified messaging
- Inability to get replacement parts
- Requires outside intervention to configure certain aspects of the system (costly)
- Lack of flexibility as to where the operators console can be.
- Lack of flexibility for having offsite extensions.
- Overlap in the required number of phone lines.
- Limited voicemail capabilities: sending multiple people the same message w/o a group distribution list.
- Unreliable voicemail messaging.
- Out of date. Must go through main switchboard at PAC.
- Once PAC closes, so does the phone system. Poor after-hours service.
- No connection to cell phones; so message to my office voice mail does not connect to my cell voice mail.
- On some actual phones it is difficult for outside caller to hear people.

Balanced Scorecard (Relate this project to the strategies and the perspectives of the Library’s balanced scorecard, either the system scorecard or a departmental scorecard. What strategy is supported by this project? Which of the four perspectives does this project best align with?)
This project strongly aligns with 3 of the 4 perspectives.

First, a new voice system will allow our customer better access and interface with the Library. It will allow the Library to better serve the customer as a phone system is a primary interface tool with our customer.

Second, a new system will allow us to run the business better. There should be new capabilities that will allow us to enhance our current business processes. Mobility in the stack, direct inward dial numbers, uniformity in the systems, remote extension flexibility are a few of the opportunities.

Third, a new system should help us to manage financial resources better through operational efficiencies gained through the elimination of redundant phone lines and reduced maintenance costs.
Vision Statement: (Paint a picture of a successful outcome.)
Customers will have easy and seamless access to the resources and people that they need at PCLS. PCLS will have a state of the art voice communications system that will have new flexible hardware and new capabilities that address some of the shortcomings in our current system. The system needs to be completely integrated throughout the system, flexible to adapt to the changing technology, Programmable by PCLS for future changes, and have extensive capabilities.

Desired Outcomes: (Describe what the project will produce, resolve or deliver to succeed. How will success be measured? If appropriate, define when the outcomes will be achieved.)
The project will produce 3 major outcomes. First, it will first define the structure of a voice communications system at PCLS. Secondly, it will specify the hardware and software needed to achieve this vision. Lastly, it will purchase and install the system to achieve the appropriate voice system.

Communication: (Who needs to know about this project? Who needs to be involved? Who will be affected by this project? Who needs to be included in the information loop? How and when will they be informed?)
All PCLS staff need to be aware of the project as it will affect everyone.
Key staff will be:
- current telephone operators
- IT staff
- Communications staff
- Reference staff
- Administrative staff
- Staff who have a vision of the possibilities for a new voice system (to obtain their ideas)

Scope of Work & Major Deliverables: (Describe the end-product. Identify specific deliverables that customers whether internal and/or external, will receive. Clarify what will not be delivered.)
This project covers the replacement of the voice communications system at PAC and all 18 branches with the exception of the cellular service. All PBX’s, voicemail systems, Digital Voice Recorders, handsets, operator consoles, and all phone lines will be examined for their place in the new system. All processes associated with the use of voice/phone service will be examined and revised as needed.

The major deliverables will be:
- A document defining the structure of the voice communications structure at PCLS. This will include standards and policies for the use of the system.
- A RFP defining the specifications for the purchase of new equipment and software to implement this plan
- Purchase and implementation of this new system
- Staff training on this new system
- A requirements document to allow for the bidding of network services (phone service) through Erate

Assumptions: (Identify the underlying assumptions of the project and the plan. Can they be verified? If they change, what is the affect on the project?)
The current telephone system(s) are old, subject to breakdown, non standard and need to be replaced (should be easy to verify)
The current telephone system has little flexibility (can be verified)
There is pent up demand from staff and customers for a new system (can be verified).
A new system will save operating costs. (should be verifiable)
A new system will enhance the customer experience.
Sufficient budget (we will know at bid time).
**Project Sponsor:**

**Project Manager:**

**Stakeholders & Customers** (Identify the departments that have an investment in the project’s success, planning and/or implementation. Identify the stakeholders and customers this project targets.)

- Receptionists
- IT will need to be involved from the installation and maintenance of the system
- ILS Administrator representing Help Desk Staff
- The current receptionists/Collection Management
- Communications Director
- Information Experience Director representing Reference Staff
- All Branch Services Staff that use or answer a phone
- A subset of the Leadership Team
- Outreach
- Youth Services
- Customers

**Organizational Impact** (Identify any needed new/enhanced staff skills, training, professional services, or outsourcing; new/modified equipment or software; new/remodeled facilities; reorganization; etc. Assess any change in operating expenses.)

- Replacement of all hardware and software used for voice services (except cellular service).
- All staff will need to be trained on the use of the new phone system including:
  - Proper greetings
  - Proper voicemail setup, use & retrieval
  - Usage of the handsets for features such as transfer, speed dial, conference, outside lines
- Receptionist will need expanded training for operator functions
- Train as needed for expanded functions as needed such as:
  - Offsite help desk
  - Automated call distribution for Reference Staff

Operational expenses should drop as we should be able to get voice service cheaper with new equipment and we should be able to eliminate redundant lines. New equipment should be cheaper to maintain because it is newer, standardized across the system, and can be managed in house.

**Resource Requirements** (Identify the resources needed to plan and implement the project and, if appropriate, to make it part of operations. Examples include staffing (identify by department), equipment, software, building modifications, and professional services.)

- There needs to be a committee of a cross section of staff that communicates with the customers to help research, compile features and then define the structure for the voice system at PCLS.
- There needs to be a smaller committee to translate these requirements into an RFP to purchase the hardware and software that will comprise the phone/voice system
- There will need to be a committee to define the policy and standards for usage of the system including voicemail setup, greetings.
- There will need to be IT personnel to implement the system and then take on the ongoing maintenance of the system

**Risks/Opportunities of pursuing this** (Discuss the problems that may occur as a result of project success; also discuss what further opportunities may come about.)

- A new phone/voice system can have many opportunities including:
  - A chance to change or have multiple operator locations
  - Offsite extensions for some staff (help desk, telecommuters)
New opportunities for enhanced call routing (menus) and operator assisted, multi lingual operators
Changes to the service that may have an impact on E-rate funding
Changes to the data (IP) network to handle additional voice protocols
New opportunities for wireless phones/headsets in the branches
Direct Inward Dialing (DID) numbers for staff
Potential to run Sonitrol and Alerton communications over our own private network and eliminate redundant lines.

There are new risks including:
   Adding additional complexity to the network.
   Creating a system that is more difficult than the current experience must be avoided.

**Constraints** (Identify any known constraints in meeting the resource requirements, e.g., other scheduled projects; impact on regular workloads; mandated deadline.)
The PC addition project will have an impact on IT staff.
E-rate bidding for phone service for the year 2010 starts in October 2009 and ends in January of 2010 so we will need to understand the network requirements for bidding by December 2009

**Timeline Expectations** (If necessary or available, discuss expectations of timelines this project needs to meet.)
The system should ideally be completed by July 1, 2010.

**Estimated Budget** (Identify and estimate expenses associated with the project)
$225,000.00