

**WATERLOO**  
INFORMATION SYSTEMS  
& TECHNOLOGY

# Project Charter

Project uWaterloo Mass Communication  
Technology Investigation

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### Introduction

Through campus-wide consultations with university stakeholders who use email for both internal and external communications, it was identified that there are deficiencies with the way that mass emails are handled on campus.

Some key issues identified include:

1. There are many different mass email implementations - both open-source and commercial - used by areas on campus. Some areas maintain their own lists in applications such as Excel, Filemaker, Microsoft Access, Microsoft Outlook, and others.
2. There are many issues with formatting between different operating systems and software packages that cause mass emails to appear differently than how the sender designed the emails, and intended for them to be delivered.
3. Many unproductive hours are spent ensuring that mass emails are sent out properly and, in most cases, there are still errors that occur.
4. There is a need to make mass emails more personable.
5. Many departments have been using social media (e.g. twitter) for communicating with clients, and others are thinking about doing so. CPA is working on social media guidelines, and it is important that departments are aware of and adhere to the guidelines. This project will help with this awareness.

### Objectives

To investigate campus-wide mass-email solutions that enable timely and efficient delivery of mass emails to internal and external university stakeholders. The solution should address the issues outlined above. As well, this project will raise awareness to University of Waterloo social media guidelines.

### Scope

Research and recommend a mass-email technology for uWaterloo. Review mass communication solutions being used on campus, including the guidelines that are in place for these solutions (e.g. social media). Raise awareness about University of Waterloo social media guidelines.

### Scope Exclusions

It is not within the scope of this project to implement a recommended mass email solution. A follow-up implementation project may be created to do that, and would include the implementation of the recommended technology, and develop a maintenance and training/support plan for the use of the technology at uWaterloo.

## **Constraints, Assumptions and Risks**

### **Constraints**

- People time available
- Availability of software for testing

### **Assumptions**

- Recommendation would be centrally funded
- People are interested in participating in this project
- Technology, people, budget is in place to implement the project and its recommendations
- Buy-in from across the campus
- Top university management support for the recommended solution

### **Risks**

- No solution exists that will meet all the requirements
- No interest from some areas
- Losing features of current system
- Upsetting clients/staff (learning new system)
- Loss of data
- Conversion from existing systems may not be smooth
- Costs may increase, recommendation may not be cost effective or in budget
- People time may increase (installation/conversion/maintenance, increase in use across campus)
- Some areas on campus may not use the suggested solution

## **Dependencies**

No dependencies at this time.

## **Budget**

This is an investigative project so no budget should be needed. There may be a need to purchase a new product to evaluate or an existing product to upgrade.

### Timeline

The project should be completed by December 1, 2012. An update will be provided to the campus community in October 2012. Feedback from that update may help to determine further investigation (e.g. suggestion to research another product).

### Strategy

1. Document current policies and procedures for the use of University electronic mailing lists. This documentation should be in CPA's webpage.
2. Survey current solutions being used on campus, in faculties and in academic support departments
3. Gather requirements list.
4. Survey mass email technologies and policies being used by other universities.
5. Do market research on technologies currently available in the market place, including a high-level comparison of features and functionality, and cost estimates;
6. Prepare a report for the project sponsors summarizing the information collected in steps (1) through (4), and make a recommendation of a technology to implement for uWaterloo.

### Resource Roles and Responsibilities

Project team will consist of 18 members:

1. Faculties: Chris Calzonetti (Math), Dawn Keenan (Arts), Craig McDonald (AHS)
2. CPA (2): Eva Grabinski, Brandon Sweet
3. Grad Office (1): Tasha Glover
4. Registrar's Office (2): Carmen Roecker, Jennifer Mackie
5. Human Resources (1): Tammy Marcinko
6. ODAA (1): Nigel Henriques
7. CECA (1): Mike Tennant
8. Library (1) : Charles Woods
9. Students: Greg Maksoz (3<sup>rd</sup> year, Computer Science), Cody Shepherd (2<sup>nd</sup> year, Math)
10. IST (7) - CSS (2): Jason Giles, Shawn Winnington-Ball; IST-CS-Housing (1): Cheryl Skingley; CS-CPA (1): Eric Bremner; IS (1): Mike Gaspic; uCS-Registrar's (1): Tom Kelly.

Team members that are familiar with mass email solutions will be asked to do a demonstration. For example, there are team members who use GroupMail. Team members from IST and Human Resources will be asked to provide information as to how various mailman groups are populated.

## **Approval**

This charter formally authorizes this project based on the information outlined in this charter. Should any of this information change throughout the duration of the project, it shall be discussed by IST management and documented in the project performance sharepoint site.

Approved by: IST Management

Approval Date: July 2012

## **Revision History**

A SharePoint site will be created.