

<b>Project Name</b> Bulk Emailer Tool/Procedure for University Communications and Marketing	<b>Request Date</b> 01-Sep-2013	<b>Project Number (AGIT Use Only)</b>
<b>Project Sponsor</b> Jason Mayer/Chad Neilson	<b>Desired Date</b> 27-Sep-2013	<b>AGIT Owner (AGIT Use Only)</b>
<b>Short description of project / purchase (one sentence)</b> Purchase of a more robust bulk email too that allows for analytics, administration, design, white listing, etc...		

**ALL requested and/or recommended technology projects must complete the checklist below.**

*Definition: A project is a temporary endeavor undertaken to create a unique product, service, change, or result. A project is different from “business as usual” activities (operational work) in that it has a number of distinguishing features: it brings about change, has unknown elements therefore create risk that must be managed, and has a defined start and end (is temporary). In contrast, “business as usual” activities are characterized by having known policies, processes, procedures or precedents which may be followed, virtually no risk is present, the activities are not new but repeated (albeit not necessarily very frequently) and therefore does not offer change.*

**CHECKLIST**

YES	NO	CRITERIA
	X	1. Requires new ITS and / or other departmental information technology resources (including new or increased support needs)
		2. List amount of initial plus five-year on-going information technology costs for the project (i.e. first time hardware/software acquisition, professional services, annual maintenance, staffing, etc) \$ <u>250/month</u>
	X	3. Requires new integration with existing information technology or electronic data systems such as Banner, FAMIS, R25, and ITS Identity/Access Management.
X	X	4. Affects information technology aspects of multiple organizational components of the university.
	X	5. Has information security aspects with respect to implementation of the information technology (privacy, confidentiality regulatory or compliance).

- IF checking ‘NO’ to all criteria above, submit the completed checklist to AGIT for final review and approval.
- IF checking ‘YES’ to any of the criteria above, the Proposal form (below) must be completed and submitted to AGIT for further review and assessment.

**AGIT Findings**

1. Criteria utilized in review process

Possible institutional view, availability of other products already owned by UI, limited data security risks

2. Findings

Approved. Need is high given expiration of current contract. Cost is low, possible utilization by many other UI groups.

3. Comments

Review in three months to determine project success and possible wider rollout.

## Proposal

## OVERVIEW

1. **University Responsibility** - Identify the name, email and phone number for the following:
  - a. **Sponsoring Department – University Communications and Marketing**
  - b. **Executive Sponsor** (highest ranking person responsible for acquiring all required resources necessary to successfully complete this project as well as removal of barriers that would impede its progress).  
Chris Murray (University Advancement) [chrismurray@uidaho.edu](mailto:chrismurray@uidaho.edu) 885-xxxx
  - c. **Project Manager** (individual responsible for the day-to-day coordination and management of this project)
    - Chad Neilson (University Communications and Marketing) [clineilson@uidaho.edu](mailto:clineilson@uidaho.edu) 885-xxxx
    - Jason Mayer (Advancement Information Services) [jasonm@uidaho.edu](mailto:jasonm@uidaho.edu) 885-2072

2. **Description** -- Include in the description the following: the need, opportunity and/or the problem to be solved; the project scope including the definition of success; as applicable, describe the existing process that needs to be automated or enhanced; and for medium to large requests, provide a short description of each feature comprised in the project.

There is an ongoing need to communicate with constituents of the University of Idaho via email. The current vendor contract for University Communication and Marketing bulk email tool (iModules) expires 30-Sep-2013 and a replacement tool is needed.

A bulk email tool should include, but is not limited to:

- Ability to upload email address lists
- Provide email analytics (i.e. open rate, number of clicks, etc...)
- AB testing
- Proactive white listing (black list prevention)
- Provide an HTML editing tool and email templates
- Allow for merge fields (custom emails)
- Provide different levels of email administration (creator, sender, viewer, etc...)
- Feature reports that can be used to inactivate and/or update email addresses

Success for this project will include identification, selection, and implementation of a bulk email tool that contains as many of the tools above by the designated deadline (30-Sep-2013).\*\*

\*\*Accompanying the selection/implementation of a bulk email tool will be a plan to both reduce the number of emails sent, formalize the process for sending bulk email through UCM, and bring University Communications and Marketing into compliance with the Federal "Can Spam" Act of 2003. See additional documentation for details.

3. **Required Costs and Resources**
  - a. **Budget estimate** -- Include both one-time and ongoing for hardware, software, staff hours (both ITS and non-ITS personnel -- including within the sponsoring department and others), consulting /professional services.
    - \$250/month (for preferred vendor Mail Chimp)
    - 2 hours non-ITS staff time for one time set up
    - No consulting nor professional services required
  - b. **Financial commitments /resources for above**
    - Chris Murray has allocated a budget to cover the monthly costs
    - Chris Murray has dedicated personnel for implementation

**PROJECT BACKGROUND**

1. **Context** -- Describe if it is a regulatory requirement, a mandate, supportive of a local tactical/operational plan, or supportive of a specific element of the University of Idaho strategic plan.

Use of a bulk email tool will provide a gateway in which to engage and communicate with a variety of diverse University constituents in an efficient and cost effective way.

Having a formalized process for sending bulk email will bring UCM into compliance with the Federal Can Spam Act of 2003 (see additional attachment).

2. **Value proposition** -- Identify projected cost savings and/or efficiencies and/or profitability (if applicable) and the associated timeframe as well as related process or service improvements.

Replacing our current bulk email tool (iModules @ \$6,000/year) with our preferred choice of email vendor (Mail Chimp @ \$250/month) will save University Advancement \$3,000/year while providing better tools and a more flexible contract.

Implementing the bulk email plan (see additional attachment) could lead to more targeted email lists, which could lead to a higher open/response rate which would increase the effectiveness of communicating and engaging constituents of the University of Idaho.

3. **Beneficiaries** -- Identify who on campus or which off-campus constituent group will directly or indirectly benefit.

University Communications and Marketing will benefit by being able to continue to send email to a large group. Mail Chimp has advantages over our current vendor, iModules. UCM also has a representative in each of the academic Colleges as well as employees who will be responsible for handling adhoc requests from outside areas (i.e. Library, Athletics, etc...) that will assist in each area getting their communications out.

Using the new bulk email process, constituents who receive email will benefit by getting fewer emails that will be more targeted to their preferences (as opposed to anyone with an email address in the Banner database).

4. **Risks** -- Describe all risks associated with doing as well as NOT doing this project.

Without a bulk email tool, different areas of campus will be left to their own devices to send email and the limitations of whichever tool they select. Electronic communications would decrease campus wide and budgets would rise with the mailing out of material. Constituents would stop receiving important communications from the University of Idaho.

Without changing the process of sending bulk email, the University could be vulnerable to lawsuits (Can Spam Act of 2003).

5. **Alternatives Considered** -- Document alternatives considered and why rejected. Changes in business processes to accommodate existing technology solutions should be considered and documented.

Using iModules was not cost effective. Despite a sales pitch to the contrary, the iModules server for the University of Idaho bulk email was blacklisted by both Comcast and CableOne which effectively stopped communication with some significant Alumni and donors. The ability to unsubscribe in iModules was not as easy as it should be.

Telisma was reviewed but UCM/Advancement could not get a firm commitment as to when/if this CRM tool would be available for our use. There was concern by the internal Telisma technical staff about potentially adding 300,000 records to their existing database. Further investigation by Jason Mayer found the underlying architecture to be somewhere between initial Telisma team implementation of a flat/non-normalized database and a normalized but internally created/maintained database. This current structure is difficult to support/maintain and there is resistance to move more production systems onto it including communications from the President's Office.

6. **Timeframe and Urgency** -- *Identify relevant timeframes or related timelines. Do we need to do this right now or can it wait? Define the level of urgency and priority compared to other work, both project and operational.*

The current contract for iModules expires 30-Sep-2013. A new bulk email vendor needs to be in place by the end of this month. Our preferred vendor (Mail Chimp) allows for a month to month contract (little to no commitment). This is urgent for un-interrupted communications to continue.

Improving the email process has been identified as something that is necessary. As such, a formalized process will be implemented soon with regular annual reviews to ensure compliance and improvement.

7. **Constraints** -- *Identify constraints such as budget, schedule, staff, equipment, facilities and infrastructure, etc.*

Time is our biggest constraint (30-Sep-2013). UCM/Advancement staff resources have been dedicated to ensure communication is un-interrupted. A budget has been secured for the purchase of a replacement bulk email tool. Most solutions we've reviewed are hosted off campus and do not require equipment/servers/infrastructure on the University's part.

## CONNECTIONS

1. **System impacts / dependencies** -- *Identify any prerequisite projects as well as any related or connected processes or projects that will need modification or changes as a result of this project. Describe how existing systems and processes need to be modified or extended to accomplish this project.*

There are no processes that need to change for the identification/selection/implementation of a bulk email tool.

UCM is creating a formalized system for requesting email lists, creating emails, reviewing email content, sending bulk emails, and post email data cleanup but that is independent of a bulk email tool.

2. **Enterprise Systems Integration** -- *Requirements for interfacing to all institutional IT/ ERP systems including but not limited to: ITS Authentication (LDAPS), Banner – HR, Banner – Finance, Banner – Student, VandalCard, Document Imaging, Web Services, and Help Desk.*

There will be no need to integrate with any Enterprise systems. After bulk emails are sent, the manual process for updating email addresses/inactivating accounts will be the same. Currently decisions to inactivate email accounts are subjective and need human interpretation (i.e. bounce back reasons "out of the office" vs. "Inbox full" vs. "bad account").

3. **Stakeholders -- impact and/or buy-in** -- *Identify various stakeholders (both from within ITS and outside) whose support is required to make this project successful. Has their buy-in been secured? If not, what conditions or constraints have they placed on their support?*

Key stakeholders for this project include Chris Murray (VP Advancement) and Chris Cooney (Sr. Director of Marketing - UCM); both of whom have directed this project to Chad Neilson and Jason Mayer with their support.