Project Charter	STONY BROOK UNIVERSITY
Project Name	WolfieConnect
Project Owner	Division of Information Technology in collaboration with the University Community
Focus Area	Expand electronic collaboration capabilities through adoption of a new collaboration and e-mail service platform
Document Owner	Shady Azzam-Gomez, Project Manager

PROJECT OVERVIEW / BACKGROUND

An explosion of technology innovation, increasingly driven by commercial and consumer markets continues to expand people-to-people communications and collaboration capabilities. New developments such as smart mobile devices, social networking, real time shared white board, Twitter, Cloud services, and many others are having and will continue to have a major impact on how universities conduct academic activities.

Current institutional services already provide multiple collaboration capabilities including e-mail, calendaring and much more but, for the most part, these are not widely used across academic units so most collaboration at SBU is accomplished through basic e-mail with attachments. Administrative offices also use various aspects of unified communications (such as shared calendars, mobile e-mail, instant messaging, e-mail to fax, etc.). Current institutional e-mail services are highly functional and appear cost effective, though, across the industry, costs for local systems are rising. The University has two primary institutional e-mail systems: Lotus Notes, largely used by staff and faculty, and SUN IMAP, largely used by students, MS Exchange is in pilot and a number of academic departments and other units run various local e-mail systems.

To serve its academic mission and manage costs over time, SBU will want to take advantage of the economies of scale of the large e-mail and collaboration suite providers such as Google or Microsoft. Doing so now will maintain current capabilities, address a set of immediate concerns, and position SBU well for future services that would have a very high cost to provide locally if that were even possible.

WolfieConnect aims to provide full access to the next generation of electronic communications and collaboration services essential to achieve Stony Brook's mission of research, education and discovery. WolfieConnect intends to address existing e-mail concerns, expand collaboration capabilities and adopt a platform that will track industry innovation into the future.

A Steering Committee comprised of faculty, students and staff will guide the policy and functional choices in the project and will provide a recommendation to the President for a final decision. The co-chairs of that Committee are the Executive Sponsors of this project. The Steering Committee will determine the final details of the evaluation process, feature comparison and other details leading to a recommendation.

PROJECT SCOPE

Goals and Objectives

Goals:
- Identify baseline and advanced electronic communications and collaboration service features needed at Stony Brook and available in mainstream service platforms, including, for example, full function e-mail, mobile device support, file sharing, shared documents, interconnection with social networks, unified communications, instant messaging, and more.
- Assure that the chosen platform supports best practices for information security including, for example, local and federated single-sign-on authentication, and spam and malware filtering.

- Select and establish a new electronic communications and collaboration service platform for the campus that will best meet the needs of faculty, staff, students, affiliates and off-campus collaborators over the coming three to five years.
- Reduce the "total cost of ownership" for future costs of e-mail to SBU for equivalent services.
- Minimize the impact of change in existing services – primarily e-mail - to University constituents and operations

Measures:
- Compare e-mail usage of the current systems with the new system.
- Analyze "Total Cost of Ownership" ("TCO") for current e-mail and collaboration services, including projecting costs for the immediate future; compare TCO and overall function across proposed options and, upon completion of the project, with the installed system.
- Conduct an outcome survey after completion of the project.

Client Impacts

- Since WolfieConnect proposes to change the e-mail engine, if not the e-mail client, across the campus, this project will touch faculty, staff, and students in the affected units. Because e-mail clients will change in some cases (primarily staff and faculty), some e-mail and calendaring functions will change and some clients may experience variability in function. In most cases, e-mail and calendaring function will remain similar or will improve. The primary disruption will be during the period of transition when clients transition to the new calendaring and e-mail system.
- The project could involve manual migration of archives, calendar, and/or room resources.
- Some mobile devices might not be supported under the new system.

Project Deliverables

The overall project deliverable is to create the capability to host all current clients of the two major institutional e-mail systems (Lotus Notes and MySBMail e-mail system) and to have successfully migrated all MySBMail clients and at least 65% of Lotus Notes clients by the end of the Fall 2012 semester.

Milestone	Date
1. Communications plan	Ongoing
2. Codify user requirements and identify options	August - Sept 2011

3. Analyze options, including client review
  • Analysis of user impact
  • Cost benefit risk analysis
  • Review legal documents
	October - November 2011

4. Choose Option	December 2011
5. Plan migration	January-Mar, 2012
6. Implement	April-June, 2012
7. Pilot go live	May-June 2012
8. Go live, elective migrations begin	July 2012
9. Student migration begins	July 2012
10. Students migrated	September 2012
11. Begin new provisioning on new system	September 2012
12. 100% of MySBMail users migrated At least 65% of Lotus Notes users migrated	December 2012

Out of Scope

- Lotus Notes Applications
- Hospital and HSC e-mail systems
- CEWIT
- Computer Science and other Academic departments not in Lotus Notes
- Retirees
- Alumni
  [Note: Some of these areas might be included in a phase 2 approach.]

PROJECT CONDITIONS

Project Assumptions

- Resource availability
- Lotus Notes Applications - migration to be done under a different project plan.
- Stable systems and applications.
- Test environment/Sandbox available.
- For outreach purposes, availability of focus groups and/or town hall meetings, communications plan.
- For PM purposes, a SharePoint Teams site will be used.
- An engaged Steering Committee that meets monthly.
- Weekly formal project team meetings.
- Create a standard project reporting format which presents results to date against the project plan in an overall "dashboard" (red, yellow, green) on key areas and which tracks and follows-up on specific outstanding issues – will be hosted in SharePoint site.

Project Risks and Constraints

Technological
- Inadequate testing.
- Capabilities to meet Federal/State requirements for archival, eDiscovery.
- Inadequate performance or excessive downtime with no service guaranteed.

Resources
- Allocating or scheduling the needed resources on a timely basis for project planning, execution, monitoring and controlling might be limited at times.
- Financial implications.
- Free to minimal fee cloud services now might assess a fee in the future.

Other
- Vendors not capable of providing different e-mail models to different segments of the university community based on their e-mail needs (mobile executives, information workers, occasional users).
- State and Federal compliance (FERPA, HIPAA).
- University community rejects/dislikes system.
- Lack of adequate functionality.