AE Initiative Summary Business Case – Email & Calendaring

Business Sponsorship & Ownership

Project Name:	IT – Email & Calendaring
Team Members	Rhonda Davis (team lead), Bobby Burrow, William Easton, Chris Holsman, Jon McKenzie, Louise Root-Robbins, Eric Straavaldsen, Carl Vieth, Lisa Walters
Business Unit(s):	Vice Chancellor for Administration – Administrative Excellence
Business Process Owner(s):	DoIT, Vice Provost for IT and CIO, CIOs/IT directors of schools, colleges, and auxiliary units
Preliminary Cost Estimate:	~$664,000 in migration costs
Preliminary Savings Estimate:	~$11 million of savings in operating costs over 5 years; ~130,000 hours of freed-up employee capacity per year

Background

In late 2010, the University of Wisconsin-Madison appointed a Division of Information Technology (DoIT)-led team to evaluate replacements for the University's email, calendar, and chat services (ECC team). Soon thereafter, the Administrative Excellence (AE) Phase 1 Information Technology assessment identified significant savings and efficiency opportunities through consolidation of existing email and calendaring systems across campus. In January 2012, the AE Steering Committee chartered a team to leverage and build upon the ECC team's work, describing the objective as follows:

> "Identify a single email and calendaring platform for the UW-Madison community (including faculty, staff, and students) that meets the broad needs of the University. The team will identify the system, quantify the investment required and efficiencies anticipated, and determine service levels and policies that would govern the administration and use of the new system."

The team conducted its work over 22 weeks, recently presented its recommendations to the AE Advisory and Steering Committees, and received Advisory Committee endorsement and Steering Committee approval.

Approach

In order to develop its recommendation for a single email and calendaring platform, the team took the following approach: (1) gathered user requirements; (2) assessed the existing campus email and calendaring infrastructure; and (3) evaluated the strengths and weaknesses of prospective systems and their alignment with campus needs. Each of these phases involved leveraging and building upon work completed by the DoIT ECC team.

Gathering User Requirements

The team engaged with a wide variety of email and calendaring users via a comprehensive requirements-gathering process – a critical step in selecting the best-fit system for campus. The team distributed a use-case survey to all faculty, staff, and students. To supplement the data collected from the 3,350 survey respondents, the team conducted individual interviews with power users of select systems to better understand possible barriers to adoption of a new unified system. Recognizing that system requirements may not be visible to end users (e.g., spam filtering, data security), the team also engaged the administrators of distributed email systems to identify additional requirements (described below).

Assessing the Existing Email and Calendaring Infrastructure

At project onset, the team identified that limited information was available on the existing email and calendaring infrastructure, including the number, location, type, and operating costs of distributed systems. To develop baseline data, the team took two approaches: (1) a network scan to identify email servers for domains on campus; and (2) distribution of a survey to email & calendaring administrators. The team structured the survey to learn more about why units had procured their systems and the characteristics of those systems. The team also conducted a listening session with a subset of the survey audience to further understand the evolution of the systems and relevant departmental/unit needs that would remain as key drivers for the selection of a new campus-wide solution.

Evaluating Systems Based on Campus Needs

The team weighed the competing factors of cost, capability, and complexity with respect to potential enterprise-capable email & calendaring systems. Systems were evaluated based on a variety of criteria, including:

1) Attendant savings associated with adoption of a system
2) Alignment with campus' security requirements including HIPAA and U.S. export control regulations
3) Alignment with campus' performance and functional requirements
4) Ability for the system to be technically integrated into IT and University operations (e.g. APIs for customization)
5) Capability of the system to easily allow for delegated administration, or role-based access control
6) Requisite change management associated with campus-wide adoption
7) Sustainability of the system – anticipated evolution and alignment with campus needs

The team leveraged responses to a formal Request for Information (RFI) that had been disseminated by the ECC team in order to further support system evaluations. Meetings with vendors allowed the team to gather additional and updated information. Team members also held conversations with, and conducted research on, peer institutions that are currently undergoing email and calendaring conversions. These included the University of Nebraska-Lincoln, a recent adopter of Microsoft Office 365, and the University of Minnesota, a recent adopter of Google Mail and Calendar.

Observations

WiscMail and WiscCal, the DoIT-implemented and supported email and calendaring systems, have not been adopted campus-wide, with many schools and colleges choosing instead to implement and support their own local email and calendaring services. The team identified twenty distributed email and calendaring systems across campus, but estimate the total number to be between 35 and 50. A range of systems are in use, including Exchange, GroupWise, and several open source applications. Individual units host their own systems for a number of reasons, including the desire to be more responsive to the demands of their internal customers, security requirements, and/or the need for integration with other software or business tools. From an operating perspective, the abundance of distributed systems results in increased costs to campus due to duplication of hardware, software licensing, infrastructure, and end-user support. The total annual operating costs of redundant systems across campus are estimated to be approximately $1.6 million, in addition to the $2.4 million spent annually to run WiscMail/WiscCal.

This proliferation of systems is responsible for a significant loss of workforce productivity in the calendaring area. From the use-case survey, the team found that 18% of employees spend an hour or more per day scheduling meetings and/or managing calendars. 25% of employees report that it takes over 2 days to schedule a meeting and 40% indicated that they have to restart meeting requests more than 20% of the time. The workforce inefficiencies are a direct result of the disparate systems; scheduling meetings and conducting business within this inefficient system requires an estimated 130,000 additional hours of labor each year, above what would be required with a single calendaring system.

Core Recommendations

As a result of a comprehensive requirements-gathering and product-evaluation process, the team selected Microsoft Office 365 as the system that best matches the University's functional, technical, and data security needs, and recommends campus-wide migration. By adopting Office 365, the University has the opportunity to save approximately $11 million over 5 years in operating costs through reduced spend on servers, software, licenses, and spam/virus protection. Campus-wide migration to this system would also create a significant opportunity for schools, colleges, and DoIT to redirect staff time to activities which are more beneficial to the teaching, learning, and research missions of the University. Additionally, the adoption of a single calendaring solution would drastically reduce the time spent on scheduling and confirming meetings, creating approximately 130,000 hours of freed-up employee capacity to campus units per year.

While alternative systems, including Google Mail & Calendar, and migration scenarios were evaluated in-depth, Office 365 is the only system that meets not only the University's functional and technical requirements, but also data security requirements, including the Health Insurance Portability and Accountability Act (HIPAA) and U.S. export control regulations. The team considered, but ultimately rejected, a dual Google/Microsoft solution, as the requisite effort/cost to procure, configure, and maintain such an infrastructure was deemed to outweigh the benefits. Ultimately, a unified cloud-based system presents a major savings opportunity for the University, and Office 365 is the only option that can be adopted by the entire campus.

While Office 365 was selected as the best-fit email and calendaring system for campus, the team recognizes the value campus places on access to the Google Apps suite. To that end, the team recommends that Google Apps continue to be offered to all campus users.

Implementation

The team proposes a phased implementation for Office 365 that prioritizes minimal disruption to University business and ensures a full user training and support program. DoIT will develop a detailed rollout plan, provide oversight for the overall migration, and manage the conversion of WiscMail/WiscCal accounts. IT "swat teams" with particular system expertise and conversion experience will be deployed to assist departments in converting their existing platforms. The University will also provide options for self-service migration, tools for large repository migration, and training for both.

Customer Readiness and Change Management

According to the use case survey, approximately 30% of employees and students indicated that they don't foresee any barriers to adopting a new central UW email and calendaring system. The top barrier reported was a misalignment of features with needs. The team believes Office 365 will provide the best opportunity to overcome that barrier, since the system matched the largest number of identified functional requirements.

In local units, ease of migration will be dependent on the current state email and calendaring situation, including the system to be converted, and support available. Migration assistance and a fully developed training program with online and in-person resources will address barriers to conversion.

Considering the scope of the migration and impact on users across campus, the engagement and support of senior administration, in addition to both IT and departmental/unit leaders, will be critical to implementation success. The team recommends that the system and related services, including support and training, be funded centrally, reducing any financial and operational burden for units to convert. Eliminating incumbent systems, and the organizational support for them, will be necessary to achieve a unified campus email and calendaring environment, and enable the University to realize the significant benefits described above.

Review and Approval

Advisory Committee	Endorsed	May 17, 2012
Steering Committee	Approved	June 5, 2012