

Administrative Excellence

IT – Email & Calendaring Consolidation



WISCONSIN
UNIVERSITY OF WISCONSIN-MADISON

Campus Forum – 6/20/2012

Project Team Members

Name	Organization
Rhonda Davis ¹	School of Veterinary Medicine
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William Easton	Student Representative
Chris Holsman	Division of Information Technology (DoIT)
Jon McKenzie	College of Letters & Science (L&S)
Louise Root-Robbins	Division of International Studies
Eric Straavaldsen	College of Letters & Science (L&S)
Carl Vieth	College of Engineering
Lisa Walters	Office of the Vice Chancellor for Administration (VCA)
Chris Slatter	Huron Consulting Group

Note: (1) – team lead

Goal Statement

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. 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.

Work Team Approach

1 Voice of the Customer

What are the user requirements?
Where are the current pain points?
What are the barriers to conversion?

Related Activities

- Leveraged previous DoIT-led team's work in this area
- Administered use case survey of all faculty/staff/students (3,350 responses)
- Conducted interviews with faculty members

2 Existing Infrastructure

Where are the individual systems on campus and why do they exist?
What are the barriers to converting these systems?
How much does it cost to run email & calendaring in the current state?

Related Activities

- Performed a scan to identify systems
- Administered email & calendaring system administrator survey (31 responses from 59 invitees)
- Held follow-up listening session with administrators to understand unique stakeholder needs

3 Solution Assessment

How does the solution align with campus requirements?
How much would it cost to switch to and run the new solution?
What is the roadmap to implementation?

Related Activities

- Leveraged previous ECC team's work in this area
- Engaged with vendors for additional and updated information
- Held conversations with peer institutions

Change Management

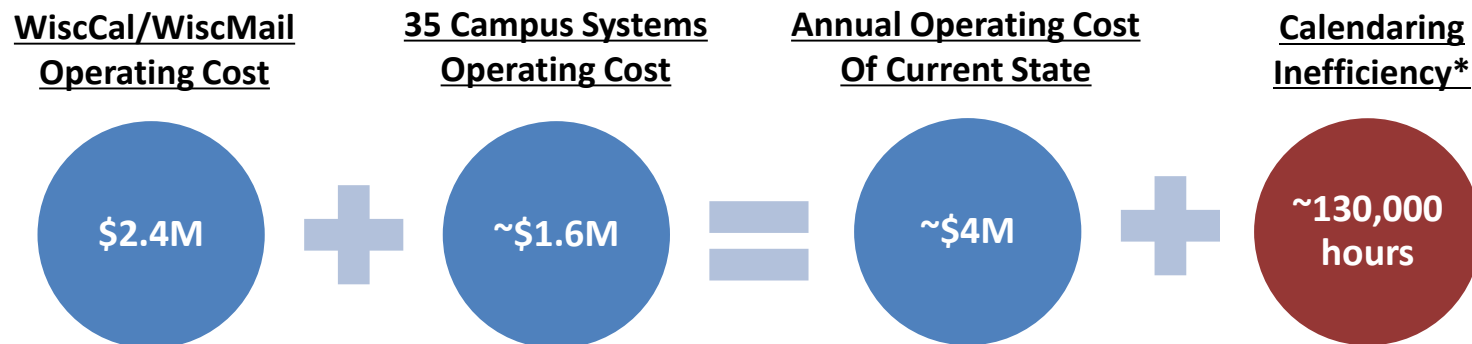
Current State Observations

Summary

- In addition to WiscMail/WiscCal (Oracle), the team identified 20 distributed email & calendaring systems; the total number of systems is estimated at 35-50
 - Of the known systems: 45% use open source applications, 35% Exchange, 15% GroupWise
- Units host their own systems for a variety of stated reasons:
 - The ability to be immediately responsive to the demands of their internal customers
 - A need for integrated email and calendaring products
 - A need to meet security requirements (e.g. HIPAA, FERPA)
 - A need for integration with other software or business tools
- Disparate systems result in increased cost to campus due to duplication of hardware, software licensing, infrastructure, and end user support
- The proliferation of systems also leads to a significant loss of productivity in the calendaring area:
 - 18% of employees spend an hour or more per day scheduling meetings/managing calendars
 - 25% of employees report that it takes over 2 days to schedule a meeting
 - 40% of employees have to start a meeting request over more than 20% of the time

Current State Observations

Each year, UW-Madison spends an estimated \$4M on email and calendaring operations, in addition to forgoing ~130,000 hours of labor due to calendaring inefficiency.



A unified system for email and calendaring will reduce infrastructure costs on the IT side and will enable the recovery of lost productivity on the end user side. It would also create a significant opportunity for schools, colleges, and DoIT to redirect labor to activities which are more beneficial to the teaching, learning, and research missions of the University.

**Represents ~130,000 hours; assumed 30 mins. of lost productivity per meeting; 0.1 inefficient meetings per person per day; 10,000 calendaring staff; 261 scheduling days per year*



Options Considered – Initial Scenarios

While the team’s charge was to find one solution for campus, seven possible scenarios were initially considered:

Scenario (# systems)	Population		Assessment	Notes
	Faculty/Staff	Students		
A (1)	WiscMail+/ WiscCal+	WiscMail+/ WiscCal+	✘	Operating cost significantly higher than cloud-based systems (\$13.5M vs. \$8.1-8.3M over 5 years)
B (1)	Microsoft Office 365	Microsoft Office 365	✓	Approved for further consideration
C (1)	Google Mail and Calendar	Google Mail and Calendar	✓	Approved for further consideration
D (2)	WiscMail+ / WiscCal+	Either Google Mail and Calendar or Microsoft Office 365	✘	Data from the use case survey did not suggest any key differences that would require a separate system
E (2)	Either Microsoft Office 365 or Google Mail and Calendar	Opposite		
F (1)	Microsoft Office 365 or Google Mail and Calendar or WiscMail+ /WiscCal+	Students provide their own email address	✘	High value placed on wisc.edu email identity and a large number of student employees that would need to be on the University system
G (2)	Both Microsoft Office 365 and Google Mail and Calendar (Choice)	Either Microsoft Office 365 or Google Mail and Calendar	✓	Approved for further consideration

Options Considered – Remaining Scenarios

The team proceeded to evaluate three remaining scenarios. Discussions were held with both Microsoft and Google to review requirements and key considerations.

	Microsoft Office 365	Google Mail & Calendar	Dual Solution
	<ul style="list-style-type: none"> • Will provide a business associate agreement (BAA) for HIPAA • Will ensure domestic data storage to meet U.S. export control regulations • Robust out-of-box delegated administration capabilities • One-third of known distributed systems are already using Microsoft Exchange 	<ul style="list-style-type: none"> • Brand enjoys significant popularity among campus populations including research community • Google Apps suite is already available to campus 	<ul style="list-style-type: none"> • Solution would likely provide the least resistance to adoption • Solution would provide more flexibility as email/calendaring evolves and becomes integrated with other collaborative tools
	<ul style="list-style-type: none"> • Brand does not resonate as well as Google with certain faculty 	<ul style="list-style-type: none"> • Will not provide a BAA for HIPAA • Will not ensure domestic data storage • Limited out-of-box delegated administration capabilities 	<ul style="list-style-type: none"> • Cost to migrate and maintain two solutions • Calendar linking process and subsequent maintenance would require substantial effort • Google would not align with security requirements for certain users – significant effort required to monitor and enforce policy restricting use • Burden placed on units to decide which system to use
Summary	<p>✓ Office 365 offers the best match for UW Madison’s functional, technical, and legal requirements</p>	<p>✗ Google Mail & Calendar would not be able to be adopted by the entire campus – maximum efficiencies and cost savings not possible</p>	<p>✗ The requisite effort associated with a dual solution would outweigh the benefits</p>

The AE team recommended Office 365 as UW-Madison’s single email & calendaring system, with the Google Apps suite remaining available to all of campus.

Financial Impact of Proposed Solution

	2012-2013	2013-2014	2014-2015	2015-2016	2016-2017
Migration Costs	~\$663K	-	-	-	-
Recurring Costs	\$1.7M	\$1.7M	\$1.7M	\$1.7M	\$1.7M
Recurring Savings*	\$2.3M	\$2.3M	\$2.3M	\$2.3M	\$2.3M
NET SAVINGS	\$1.6M	\$2.3M	\$2.3M	\$2.3M	\$2.3M

Savings:

Operating cost avoidance associated with narrowing ~35+ systems to one (~\$2.3M)

- Reduced spend on servers, software licenses, spam, and virus protection
- Labor savings in the areas of system administration, software development, and hardware maintenance

Costs:

- Cost of migration is based on estimates provided by DoIT; includes training
- Recurring costs assumes distributed systems would be eliminated; assumes administrators in distributed units would spend 15 percent of their time supporting email & calendaring users

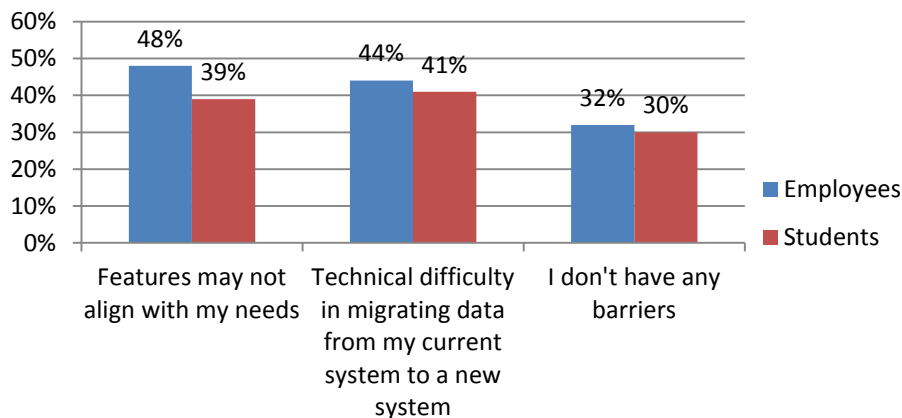
Preliminary 5 year financial impact estimate = ~\$11M of savings in operating costs; financial impact does not include workforce efficiency gains attributed to a unified calendaring system (~130,000 hours per year).

**Assumes 100 percent adoption*

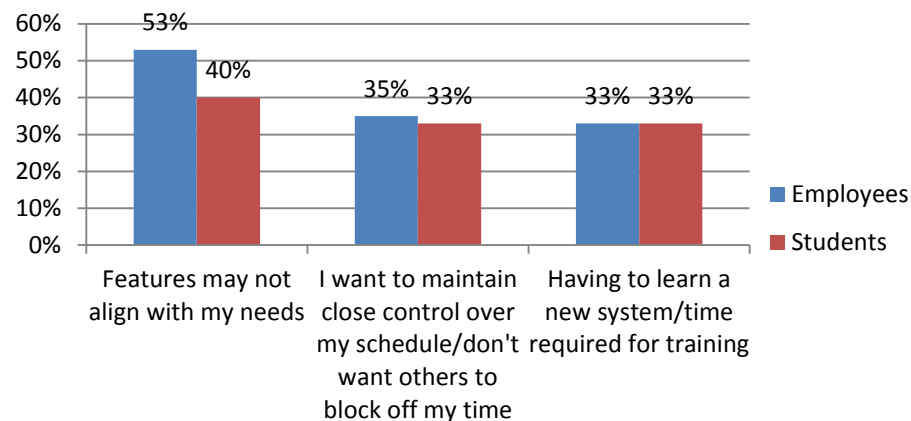
Campus Readiness

Based on various stakeholder engagements, the team believes that a large number of campus email and calendaring users will present minimal cultural resistance to migration.

What are your barriers to adopting a new central UW email system? (top 3)



What are your barriers to adopting a new central UW calendaring system? (top 3)



- Office 365 matched the largest number of functional requirements, directly addressing the number one barrier for both email and calendaring
- For many employees, migration of data will be dependent on the current state email and calendaring situation in local units. The backing and support from both IT and unit leaders will be crucial to the implementation team's success
- A fully developed training program with online and in-person resources should address related concerns

Implementation Plan

The team recommended that implementation should center on minimizing disruption to university business, and ensuring a full user training and support program.

Implementation Timing: Plan a phased approach with a goal of completing migration by August 2014. This timeline would give academic units two summers to transition. Eighty percent of all users would likely be migrated by the end of summer 2013

Key Considerations: Provide IT “swat teams” to assist departments during migration; provide options for self-service migration, tools for large repository migration, and training



Proposed
Rollout
Plan

Order	Entity
1.	VCA, Chancellor’s Office, Provost’s Office
2.	Units with an immediate business need (e.g. because of technical issues)
3.	Existing Exchange environments
4.	WiscMail/WiscCal users
5.	All other units

Additional resources to staff and support IT swat teams may enable an accelerated migration with a completion date earlier in 2014. Swat teams would require expertise in Oracle, Exchange, GroupWise, and other platforms.

Keys To Project Success

The team believes engagement and support of senior campus leaders will be essential to project success.

1. Eliminating incumbent systems as well as organizational support for non-sanctioned systems will be critical to effective implementation
2. Responsibility for oversight needs to be distributed and occur at multiple levels (e.g. VCA, CIO, division/department leadership)
3. Align incentives to encourage timely compliance
 - The team recommended that the service should be funded centrally and not have a chargeback associated with it
 - System support, training, and performance should be aligned with user/unit needs
4. Create disincentives to penalize non-conformity
 - If units don't adopt the solution within a given timeframe, the team recommended that the following strategies could be used:
 - Per-user, per-month fee assessed for all users on incumbent systems
 - Annual unit-funded security and performance audits to ensure data integrity and quality

Appendix

Potential Migration Timelines

Milestone	Scenario A	Scenario B
Develop communications plan	1-2 weeks	1-2 weeks
Determine procurement requirements and conduct vendor negotiations	3-4 weeks	3-4 weeks
Vendor engagement for project discovery, design, and technical requirements	4-6 weeks	4-6 weeks
Plan project & advisory roles and responsibilities; identify participants	2-4 weeks	2-4 weeks
Develop project plan	2-4 weeks	2-4 weeks
Deploy supporting technical infrastructure (campus AD)	Mid fall 2012	Mid fall 2012
Deploy Office 365 & migrate "early adopters"	Beginning Jan. 2013	Beginning Jan. 2013
Migrate all	~Aug. 2014	~Jan. 2014

Additional personnel to support IT swat teams for Oracle, Exchange, GroupWise, and other platforms would likely enable an accelerated migration.