

REPORT OF THE HEAD OF HR, IT AND CUSTOMER SERVICES
TO THE EXECUTIVE
3 APRIL 2009

Options for a Shared Calendar and Email System

1.0 Introduction and Report Summary

1.1 This Council and South Oxfordshire District Council are currently operating different and incompatible calendar and email systems. The consequence is a great deal of duplication and wasted effort. This report examines the options for moving to a shared calendar/email system that will promote more efficient joint working, the costs to be shared equally by the two councils. The proposal has already been considered by the Joint Senior Management Board at its meeting of 11 March.

1.2 The contact officer for this report is Andrew Down, Head of HR, IT and Customer Services, telephone 01235 540372, email address andrew.down@whitehorsedc.gov.uk.

2.0 Recommendations

- (a) *The Executive approves the adoption of Novell GroupWise as the Council's email system*
- (b) *In accordance with Contract Standing Order 2C(3) the Executive approves an exemption to the requirement to obtain competitive quotations or tenders*
- (c) *The Head of HR, IT and Customer Services in consultation with the Head of Legal and Democratic Services be authorised to enter into a contract with Novell for the purchase of GroupWise until 31 March 2011 under Standing Order 2C(3), taking advantage of the favourable terms made available by joining South Oxfordshire District Council's existing contract*
- (d) *Officers to propose options for the optimum long term solution in time for April 2011.*

3.0 Relationship with the Council's Vision

This report is aligned with the council's vision, specifically by contributing to the strategic objective of managing our business effectively.

4.0 Background

4.1 Although the mixed calendar / email environment does not prevent the reliable exchange of messages, it does mean that calendars and address books are not currently capable of being shared. Staff working across both councils are adopting a range of approaches to work around this difficulty:

- some are maintaining two sets of calendars

- some are relying on PAs to manage calendars and to act as a conduit for anyone seeking to know their whereabouts
- some are making printed copies of their calendars available to their team.

4.2 In all cases, calendars of staff who work at both authorities are either not visible to a large number of their colleagues, or complex and wasteful procedures are in place in order to make them visible. The scheduling of appointments is currently an extremely inefficient process.

4.3 Address books are not currently shared, which makes the addressing of email to colleagues at the other council a more laborious task and one which is prone to error.

4.4 An increasing and significant amount of unproductive time is currently being spent on diary management and email.

4.5 Moving to a common calendar / email system will enable Vale staff to be much more efficient in use of time, with seamless sharing of calendars and address lists. A shared calendar / email system could also be used as a common repository for documents which need to be available to staff at both councils.

5.0 Options

5.1 In order to obtain an independent appraisal of the options we commissioned a consultant, and after a competitive exercise we appointed NEC Philips to carry out the work for us.

5.2 NEC Philips ran workshops for non-technical staff at both councils and also conducted a survey, attracting a total of around 150 responses from each council. The workshops and survey results were used as the basis for devising 38 evaluation criteria under five broad headings:

- ease of implementation
- functionality
- application integration
- accessibility for remote and mobile users
- vendor specific criteria.

5.3 NEC Philips has produced a detailed report describing the methodology adopted and providing a comprehensive assessment of five different options. On 5 March their team presented the findings to a group of officers from both councils, including Steve Bishop, five heads of service, and several staff from the two IT teams. The five options were reduced to two which could feasibly be adopted now, and these were evaluated against the agreed tvecriteria.

5.4 OPTION 1 – MICROSOFT EXCHANGE / OUTLOOK

- 5.5 Exchange is the de facto industry standard and is a very low risk option. There is ample support available and Microsoft has a long-term development programme. Exchange is well able to meet the functional requirements of both councils.
- 5.6 Vale currently runs Microsoft Exchange, so a migration of both councils to Exchange would have less impact on Vale users than those from South. However, Vale's current Exchange system is based on the 2000 version of the software, which will reach the end of its supported life during 2010. Even if we do not move to a common system we will need to make a significant investment at Vale in order to carry out the necessary upgrade to remain supported.
- 5.7 Substantial technical work would be required even to move from the current Vale system to a new Exchange environment. For this reason, a migration to Exchange would require significant work at both councils. In effect, it is a completely new system even at Vale.
- 5.8 **OPTION 2 – NOVELL GROUPWISE**
- 5.9 GroupWise is less widely used than Exchange and has more risk attached. Technical support is available but there are fewer support partners to choose from. Novell is guaranteeing to continue support until 2015 but does not have a clear development programme beyond 2011. GroupWise is well able to meet the functional requirements of both councils.
- 5.10 South currently runs GroupWise and has an up-to-date installation. There would be no migration issues for South staff. Migrating Vale's Exchange users to GroupWise would mean following a less well trodden path than in the opposite direction, though this is by no means unprecedented.

6.0 Costs

- 6.1 NEC Philips has presented licence costs for the next two years, for which there is a very high level of certainty, and estimates of the number of days required to carry out the implementation. It is important to note that in addition to these licence and migration costs there will be some server hardware required.
- 6.2 In order to licence the products and to allow for software upgrades for two years, the costs for the two councils combined are as follows:

	Option 1: Microsoft Exchange 2007	Option 2: Novell GroupWise
Minimum software licence cost	£65,779	£26,660
Additional cost for two years' software upgrades	£28,671	£0
Total	£94,450	£26,660

- 6.3 South is one year into a three year licence with Novell which can be extended to include Vale for the remaining two years. It is important to note that the recommended shared solution has a two year life until the three year licence agreement expires at

the end of March 2011. Both councils will need to consider options and adopt a longer term solution from April 2011.

- 6.4 The implementation effort is estimated by NEC Philips as follows. As far as possible we will use our own staff to carry out the implementation although it will be necessary to use some expert advice particularly in designing the detailed technical infrastructure. We expect to require fewer days of expert contractor time than estimated here.

	Option 1: Microsoft Exchange 2007	Option 2: Novell GroupWise
Infrastructure implementation (mainly expert contractor days)	71 days	24 days
Mailbox migrations (mainly in-house resources)	56 days	24 days
Total	127 days	48 days

- 6.5 We currently estimate the hardware costs at around £10,000, though this is dependent on the final design of the system adopted. With either option we would envisage having one mail server at South and one at Vale, allowing for the continued use of both councils' own mail domains (southoxon.gov.uk and whitehorsedc.gov.uk).

- 6.6 Each council included a £50,000 growth bid within its 2009/10 budget. The efficiency benefits of a common email system will be realised equally by both councils and the costs will therefore be shared 50:50. The cost of the recommended solution is within budget.

7.0 Additional Implications

- 7.1 The costs described above apply to our use of calendar / email systems and do not include harmonisation of other elements of the IT infrastructure. During 2009 we will develop our plans for IT in line with the proposals which come forward for service delivery. Any increase in joint working may need to be accompanied by investment in shared technology in order to achieve the maximum efficiency benefit.

- 7.2 On calendars and email specifically, after two years from April 2011 it will be necessary to have considered possible options and implemented a longer term solution.

- 7.3 With either of the current options (Groupwise or Exchange) it will be possible to pay no more and continue to use the products from April 2011 as they are at that time, with no further upgrade possible. Eventually it will become necessary to make another substantial investment to bring the system back up to date.

- 7.4 Alternatively, again with either Groupwise or Exchange option, it will be possible to invest in continued support, maintenance and upgrades. Although it is impossible at this stage to know the costs, the team from NEC Philips was very confident that Microsoft would not at that time suddenly become cheaper than Novell.

8.0 Conclusion

- 8.1 Either of the two calendar / email options described here will be fit for purpose for both councils. The two systems are very similar in the way they work and the facilities they offer, and the transition from one to the other is easy for users to make.
- 8.2 Exchange offers the assurance of widespread deployment, but the cost to the councils of choosing this option would be high, in part because of the need to licence the product at both councils and in part because of the migration effort.
- 8.3 GroupWise has some particularly useful functions for viewing multiple calendars, scheduling meetings, and searching mailbox contents. It is a fully featured and richly functional system.
- 8.4 The council will in any event require a major upgrade to its email system by 2010. A move to GroupWise offers better value to the council than a solo migration to the current version of Exchange and Outlook.
- 8.5 I therefore recommend that we adopt GroupWise, which offers better value for money with an acceptable level of risk. The costs will be split between the two councils and can be met within the growth bids that were approved as part of budget setting for 2009/10. We plan to complete the migration by 30 September, and do not envisage that extensive training will be required as the basic processes of managing email and calendars will be familiar. It will be possible to use the training materials already available at South Oxfordshire.

ANDREW DOWN
HEAD OF HR, IT AND CUSTOMER SERVICES

Background Papers: Feasibility study by NEC Philips dated 24 February 2009