

TO: Central Administration Business Owners

FROM: Dan Moriarty

DATE: December 1, 2005

RE: CIO Sponsored Email/Calendar Initiative

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In alignment with the University's initiative to identify opportunities to leverage IT investments and to improve the quality of Harvard's email/calendar experience, Microsoft Exchange 2003 has been selected by the email project team to provide an email/calendar service following a competitive bid process. The *service* will result in a full featured, integrated, enterprise-level system. Initial implementation will be for Central Administration, Radcliffe and GSD but with the ability to scale as University needs evolve. The Exchange 2003 service allows the University to leverage its existing Microsoft Campus and Select Agreements for Microsoft Client Access Licenses (CALs), resulting in a cost-effective, high -end service offering. In addition, the University has plans to promote with FAS a second lower cost Unix mail solution for email targeted towards those schools interested in that type of solution. The result is a two-tiered email/calendar strategy able to meet the diverse needs of the University.

During the spring of 2004, a project team was formed to identify requirements and needs for an email/calendar solution and evaluate vendor solutions. Through extensive surveys and focus groups conducted around campus, the group identified clear business and technical requirements, and developed a Request for Proposal (RFP) that allowed for a comprehensive bid process to follow. The RFP was sent to 11 vendors, including Microsoft, IBM, Oracle, SUN Microsystems, Stalker, Sendmail, Critical Path, Hewlett-Packard and USA-Net. Outsourced solutions were also evaluated. All vendors were asked to respond based upon identical requirements, terms and conditions. Initial goals of the process were to:

- address reliability and scalability issues with the existing email and calendar systems
- provide a higher level of integration between email & calendaring and, potentially, other communication services
- improve the user web client experience and remote access solutions
- understand the market direction with messaging and collaboration
- drive IT efficiencies at Harvard and leverage infrastructure and services

After initial evaluations from the project team, three vendors were selected to provide a remote "hands-on" pilot. A pilot group was formed that included representation from interested schools and CAIT. Pilot members tested the solutions and provided comprehensive written and oral feedback. Seventy-five students and staff from six schools and CAIT participated in a production pilot, using these finalists' solutions for a period of two weeks. A six-page feedback form was collected from each participant and a number of focus groups were conducted to assess the vendor solutions. Using this valuable input from the community, in conjunction with results of extensive back-end systems testing, the project team made its final recommendation in June 2005 to go forward with a Microsoft Exchange 2003 solution.

An implementation workgroup has been meeting and Susan DeLellis, from my office, will be spearheading the implementation of Microsoft Exchange. Active Directory planning and implementation, a pre-requisite for Exchange, is also currently underway and is being managed by Erica Cahill of NSS.