

NORTH LINCOLNSHIRE COUNCIL

POLICY AND RESOURCES CABINET MEMBER

EMAIL PLATFORM REPLACEMENT

1 OBJECT AND KEY POINTS IN THIS REPORT

- 1.1 To introduce a proposal to replace the council's email platform
- 1.2 To seek approval to proceed with a procurement exercise in line with Contract Procedure Rules.

2. BACKGROUND INFORMATION

- 2.1 The council operates an IBM Lotus Notes email platform. This was first introduced in 1999.
- 2.2 The Lotus Notes email system hosts approximately 3,800 email boxes to a variety of users across the council and to most of our schools. In addition, it also provides a secure email facility for approximately 700 customers who require secure email accounts, enabling them to securely communicate with other government and public sector organisations.
- 2.3 The Lotus platform has previously hosted several other applications such as Intralinc, however these have recently reduced and now the primary use of the Lotus product is email.
- 2.4 Although the Lotus software environment, including Notes, is robust and secure, over recent years many public sector organisations have implemented Microsoft (MS) email facilities or migrated from Lotus Notes to Microsoft Exchange. The main reason for this shift is due to integration and compatibility difficulties, new licensing models and associated technical administration demands and skills.
- 2.5 The existing Lotus platform has a support and licensing agreement in place which expires at the end of October 2015. Although the use of Lotus products could continue unsupported after this date, it would mean that we would not have access to the latest versions or support beyond this date.
- 2.6 Recent investigations have highlighted that most of our neighbouring authorities and regional partners operate Microsoft email environments. Some authorities have had Microsoft Exchange in place for many years, others have migrated more recently from products such as Novell or IBM Notes. Microsoft Exchange email facilities are used by:
 - Humberside Fire & Rescue

- Humberside Police
- Northern Lincolnshire & Goole NHS Trust
- NHS Commissioning Support Unit (CSU)
- North East Lincolnshire Council
- Hull City Council
- Lincoln City Council
- Doncaster Council

2.7 Although the Lotus platform has stood the test of time and has provided reliable email facilities, in recent years it has presented some challenges and in some cases stifled innovation. Some examples are as follows:

- Integration with local and national partners/systems has often presented difficulties and compatibility problems.
- Integration and interfacing with our core systems and applications has not always been possible or presented difficulties.
- Lotus Notes is becoming a significant anomaly within our IT technical standards. We operate MS across the desktop and server estate except email.
- Limited integration with desktop operating systems and office applications
- Requires specific Lotus administrations skills which are becoming difficult to acquire or very costly.
- Limits the use of future EA agreements and flexible licensing models.

2.8 The move to a Microsoft email environment is a complex task, requiring careful planning, but does have many immediate and longer term benefits. The implementation of such facilities would effectively be the final piece in the Microsoft jigsaw, enabling future transformation, improved integration and the rationalisation of applications. Additional benefits are listed below:

- Same email platform as the majority of the public and private sector nationally
- Same email platform as our local and regional partners/authorities
- Integration with local applications such as Carefirst, Efinancials is simplified and more common place with the MS email platform.
- Improved integration with mobile devices.
- Ability to implement additional products such as MS Lync for Voice, Video, Desktop sharing, Smart Calendaring, Instant messaging etc.
- Integration to desktop operating system and office productivity tools. We currently standardise on MS products for all desktop devices.
- Integration with our MS Active directory, no additional login and password (single sign on)
- Strengthens the case to move to Enterprise Agreements (EA) for desktop, email and collaboration tools (Microsoft EA licensing model) either now or in the future.
- A key enabler within the shared services programme is to operate a single email system, standardising on Microsoft is the sensible approach.
- Utilise existing virtual server infrastructure rationalising our hardware estate
- Although complex, migration from Lotus Notes to MS Exchange is a tried and tested path including retaining previous mailboxes and emails.
- More in house Microsoft skills removing the need for specific Lotus administrators

- Can develop services with other public bodies over the PSN network. For example federated address books/contact lists with other local authorities or health.
- Interoperability going forward will be less technically challenging

2.9 As with any significant IT project or change it brings the potential risk of disruption to services. IT Services have an excellent track record of managing change and delivering large IT projects and will continue to do so in a risk adverse manner. Some of the following will provide assurance that disruption will be minimal and business continuity will remain throughout.

- Procurement of specific technical skills with experience and knowledge of similar migrations
- Supplier engagement
- Lessons learned from other organisations. We are in contact with Middlesbrough Council who have just completed this migration.
- Follow IT project management methodology
- Follow IT change management methodology
- Clear communication and stakeholder engagement
- Build and test new environment without impact on current system
- Both email systems can operate in parallel as one email platform until completion
- Rollout to test user groups with a detailed test plan
- User education and training
- Phased migration of email boxes
- Back out and recovery plans at each stage.
- Planned and agreed disruption periods if required (Out of Hours)

2.10 The financial risk will be managed to ensure that the replacement system does not have any financial impact on service areas and will be contained within the existing allocated IT budget provisions already in place. We expect this migration will bring greater functionality now and in the future without additional costs to the council.

2.11 It is intended to commence the official scoping of the project during early March 2015 with a target completion of November 2015. This will see the migration from Lotus Notes to Microsoft Exchange fully completed.

2.12 It is then envisaged that a 2nd phase could commence during early 2016 enabling us to join our email system up with partners. This is likely to bring additional benefits and efficiencies to the council.

2.13 A detailed project plan will be produced to identify each step and communicated once finalised.

2.14 It is expected that two procurements will take be carried out using national government frameworks. The first procurement will take place in March for the provision of specific Lotus migration professional services. This will be used to scope, design, build, test and implement the MS email platform as well as managing the migration. The second procurement will be carried out in April for the specific Microsoft Licensing required to license our user and system estate.

2.15 This two stage procurement approach allows us to achieve the best outcomes for each requirement. For example the best tender price for email licensing may come from a company that does not have the specific skills to assist us with the migration.

3. OPTIONS FOR CONSIDERATION

3.1 Identified options are:

Option 1 - Retain Lotus Notes

Option 2 - Migrate to MS email

Option 3 - Migrate to an alternative email platform

4. ANALYSIS OF OPTIONS

4.1 Option 2 is recommend to enable the benefits and issues outlined in paragraphs 2.8 and 2.9 to be realised and addressed.

5. RESOURCE IMPLICATIONS (FINANCIAL, STAFFING, PROPERTY, IT)

5.1 It is expected that existing IT Services staff will deliver the core elements of the project. Support and advice will be provided as required by our contracted software suppliers and/or our IT partner MASS.

5.2 Identifying and acquiring specific professional services to scope and design the solution together with added support to the project from start to finish will be the initial priority. This will ensure the project is designed by email migration specialists. (First procurement as identified above)

5.3 There are several licensing options for the MS email implementation. These range from MS Select (outright purchase of the software, support but no version upgrades) through to MS Enterprise Agreements (effectively a three year agreement, paid annually, leasing the product with support and upgrades during that period).

5.4 An illustration of the cost comparison between the Lotus Notes and Microsoft Exchange is detailed below. Indicative figures are supplied by our framework supplier for software and based on MS Select pricing.

5.5 Lotus Notes – two year license and support agreement

License and support	£100k per annum	£200K
External Lotus Notes Support days	£10k per annum	£20k
IBM hardware maintenance	£7k per annum	£14k
	Total	£234k

5.6 MS Exchange – Migration and two year Select costs

MS Server 2013 License		£3k
MS Exchange Client 2013 x 3000		£94k
Professional migration services	circa	£60k

Additional hardware approximately	£60k
Total	£217k

5.7 The migration, setup and ongoing support costs will be funded by existing IT Services email budgets.

5.8 Additional funding may be available from the Transformation Challenge Award (TCA) bid and Application Rationalisation capital project. The utilisation of this additional funding will be especially useful if we decide to enter into a single or joint enterprise agreement in the future.

6. OUTCOMES OF INTEGRATED IMPACT ASSESSMENT (IF APPLICABLE)

6.1 An integrated impact assessment will be completed.

7. OUTCOMES OF CONSULTATION AND CONFLICTS OF INTERESTS DECLARED

7.1 CMT have been consulted and support the recommendations.

7.2 No conflicts of interest have been identified.

8. RECOMMENDATIONS

8.1 That the policy and resources cabinet member approves the strategy to migrate to a Microsoft email platform; and

8.2 Approves the proposed procurement plan as outlined in paragraph 2.14.

DIRECTOR OF POLICY AND RESOURCES

Civic Centre
 Ashby Road
 SCUNTHORPE
 North Lincolnshire
 DN16 1AB
 Author: Paul Smith/Martin Oglesby/Jason Whaler
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Background Papers used in the preparation of this report: None