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What You Need to Know

In support of the ever-evolving needs and habits of students, over the past decade colleges and universities have transitioned from providing student e-mail through in-house systems to providing them in the cloud, to considering whether to provide them at all. Throughout this journey, institutions have learned lessons about e-mail migration, explored e-discovery implications, and recognized the cost-savings potential of outsourcing these systems. With this experience, higher education is now starting to transition faculty and staff e-mail systems to the cloud as well. As a result, the rate-of-change ranking for student e-mail systems fell from third to seventh from FY 2012/13 to FY 2013/14, while faculty and staff e-mail systems held at tenth on the list (figure 1).

*Rate of change is an indicator of how rapidly a system area is changing. It is a composite score based on year of current implementation and on plans to implement new systems or replace existing ones. Systems with the highest rate of change typically have been implemented recently or are expected to be implemented or replaced soon.

Figure 1. Characteristics of core information systems
For the most part, change in the student e-mail system market is slowing. It appears that institutions will be sticking with their chosen solution for the foreseeable future; 76% of institutions do not plan to replace their student e-mail systems in the next three years (figure 2).

Figure 2. System provision and plans for change for student e-mail systems
The story for faculty and staff e-mail systems is slightly different. This system area ranks second in anticipated change, with one-fifth (22%) of institutions planning to replace their faculty and staff e-mail system within three years (figure 3).

**Figure 3. System provision and plans for change for faculty and staff e-mail systems**
Market Share

The market for both student e-mail and faculty and staff e-mail systems is relatively homogeneous. For student e-mail, 94% of the market is using a solution from one of the top 3 vendors—Google, 50%; Microsoft, 41%; and Zimbra, 3% (figure 4). For faculty and staff e-mail, 96% of the market is using a solution from one of the top 4 vendors—Microsoft, 69%; Google, 22%; Zimbra, 4%; and Novell, 1% (figure 5). The most common solution for student e-mail is Google Apps Gmail (50%), while the preferred solution for faculty and staff e-mail is Microsoft Exchange/Outlook (55%).

Figure 4. 2014 student e-mail system market
Figure 5. 2014 faculty and staff e-mail system market
More interesting than the solutions chosen for either type of user are the various combinations of system implementations. The higher education market is evenly split between institutions that provide the same solution for both types of users and those that provide different solutions (table 1). Of those that provide the same solution, nearly half have settled on Google Apps Gmail (45%). Of those that provide different solutions, three-quarters (75%) provide Microsoft Exchange/Outlook for faculty and staff e-mail and either Google Apps Gmail or Microsoft Office 365 for student e-mail systems.

### Table 1. Combinations of e-mail system implementations

<table>
<thead>
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<th>Percentage</th>
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<tbody>
<tr>
<td><strong>Same Solution</strong></td>
<td></td>
</tr>
<tr>
<td>Google Apps Gmail</td>
<td>50%</td>
</tr>
<tr>
<td>Microsoft Exchange/Outlook</td>
<td>23%</td>
</tr>
<tr>
<td>Microsoft Office 365</td>
<td>13%</td>
</tr>
<tr>
<td>Other solution</td>
<td>9%</td>
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<tr>
<td><strong>Different Solution</strong></td>
<td></td>
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<tr>
<td>Faculty/staff e-mail</td>
<td>Student e-mail</td>
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<tr>
<td>Microsoft Exchange/Outlook</td>
<td>Google Apps Gmail</td>
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<tr>
<td>Microsoft Exchange/Outlook</td>
<td>Microsoft Office 365</td>
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<tr>
<td>Microsoft Office 365</td>
<td>Google Apps Gmail</td>
</tr>
<tr>
<td>Other combination of solutions</td>
<td>7%</td>
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<tr>
<td><strong>Total</strong></td>
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Market Shift: 2011–14

As institutions become more familiar and comfortable with the idea of outsourcing e-mail, shifts in the market from 2011 to 2014 reflect a preference for cloud solutions from a top vendor over homegrown solutions or those from other vendors. In 2014, two-fifths (37%) of institutions were using a cloud provider for both student e-mail and faculty and staff e-mail systems; another two-fifths (41%) of institutions were using a cloud provider for student e-mail alone. For student e-mail systems, cloud market share rose from 43% in 2011 to 77% in 2014, while market share for other or homegrown systems fell from 32% to 6% (figure 6). Although institutions have focused on new system implementations for student e-mail, cloud market share for faculty and staff e-mail systems also increased from 15% in 2011 to 36% in 2014, while market share for other or homegrown systems fell from 12% to 4% (figure 7). Further indicating a preference for outsourcing e-mail is the shift away from the popular solution Microsoft Exchange/Outlook (19% in 2011 to 14% in 2014 for student e-mail; 62% in 2011 to 55% in 2014 for faculty and staff e-mail).

Figure 6. 2011–14 student e-mail system market (top 5 solutions and homegrown)
Figure 7. 2011–14 faculty and staff e-mail system market (top 5 solutions and homegrown)
Case Study: Moving to the Cloud at Montgomery County Community College

Sometimes an uncomplicated, straightforward project provides unforeseen, ongoing rewards. That’s the case with the migration of e-mail for faculty and administrative staff to the cloud at Montgomery County Community College (MCCC). Like many institutions, MCCC used a dual e-mail hosting approach. The college provided e-mail for life for its students via the Google Apps Gmail cloud-based solution, whereas it hosted e-mail locally—with Microsoft Exchange—for its 150 staff, 200 full-time faculty, and 500 adjuncts. Now, the college is moving faculty and staff e-mail to the cloud in conjunction with a Microsoft Office 365 implementation.

For MCCC’s IT department, the move to Office 365 e-mail was a definite win. It freed staff to manage other systems, and Office 365 offers enhanced features (e.g., more storage per employee) that are either unavailable or more expensive in Microsoft Exchange’s self-hosted environment. But MCCC faculty and staff weren’t so sure; cloud-based e-mail’s unknown impact on their daily activities unsettled them, and the IT organization couldn’t alleviate their worries.

Instead of “flipping the switch” and migrating everyone together, the IT team opted for a department-by-department rollout over several months to ease employees’ concerns and avoid disruptions at peak periods. “We wanted our people to feel comfortable, and there was no significant rush,” explained Celeste Schwartz, vice president for information technology and college services. “We didn’t need more hardware; the move was not complex, so we invested our resources in the people-interaction piece.”

To prepare for the e-mail switchover, the IT department conducted a two-month testing period from December 2014 to February 2015, first with the infrastructure and network staff and then with an internal IT organization beta team to troubleshoot bugs and determine how many people they could migrate overnight. The administrative department rollout began in March. Then, human resources—a small department—tested Office 365 e-mail in a production setting. Their feedback resulted in increasingly user-friendly documentation. A broader rollout is now under way. The college’s vice presidents schedule convenient times for their areas; at least one VP opted for a two-day conversion, switching half the department one day and the remaining staff the next to avoid disruptions.

Now the IT spotlight shifts from technical to support. First, the IT team scans and identifies items in each person’s mailbox that won’t migrate and downloads them to thumb drives or external drives when requested. Second, it trains each department’s staff on the new e-mail system a week or two before the switchover. Finally, migration occurs overnight, and the following morning, one or two help desk members are
present at the department office site to answer questions when staff log on to Office 365 e-mail for the first time.

Migration for administrators wraps up by end of August 2015, and thus far, the IT department has experienced no staff pushback. The faculty migration begins in September, using the same staggered, high-touch approach by discipline/division for all full-time and adjunct faculty, with a scheduled completion date of December 2015.

Although this approach has short-term drawbacks—a longer implementation time frame ties up IT staff and requires short-term support to maintain both hosted and cloud-based e-mail solutions—it yields long-term gains, especially considering the cloud’s growing role in IT as more vendors offer only cloud-based solutions:

- For the end user, MCCC’s high-touch e-mail migration provides a nonthreatening end-user introduction to the new “cloud way” of working. As users become comfortable with Office 365 e-mail, it paves the way for future cloud-based service adoption—e.g., the planned fall rollout of Office 365’s other tools.
- For the IT department, the Office 365 e-mail migration created a replicable implementation model for other cloud-based services. Moreover, adoption of cloud-based e-mail frees precious staff time to focus on other mission-critical technologies, such as the learning management system.
- For the IT leader, the decision to invest significant support resources in this relatively uncomplicated migration enabled her to build community goodwill that will come in handy for more difficult projects. “I saved the ‘I’m sorry this is so tough, we don’t really don’t have a choice’ for things that are less in my control,” explained Schwartz.

As for the students, they’re happy with Google Apps Gmail, and there are no plans to transition them to Office 365 e-mail, even though they can access the other Office 365 tools. Schwartz sees no foreseeable challenges in maintaining the two different cloud e-mail solutions, since both require minimal IT staff support.
Conclusion

Like MCCC, many other institutions have cut their teeth on a migration to the cloud for their student e-mail systems. Now that they understand the cost savings that result from less infrastructure support and maintenance and freed-up staff time, as well as other implications of moving to the cloud, they are ready to transition their faculty and staff e-mail systems. Unlike student e-mail, however, e-mail for faculty and staff is more integral to conducting business. There are also more complicated compliance and security-related issues to consider because these systems transmit protected information. A migration of faculty and staff e-mail systems should be carefully planned and paced appropriately, and it should involve plenty of opportunities for feedback and support. With a successful migration, institutions stand to gain the benefits of hosting both types of e-mail systems in the cloud.

Acknowledgments

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