

## LSIS Leadership in Technology (LIT) grant based intervention Impact study template

Provider name & contact details	Yeovil College Karen Foster
LIT Project title	Developing SharePoint Meta-data and taxonomy
<b>The project</b>	
What problem or issue you were trying to resolve or improve with this project	<p><b>Implementation of Meta-data to formal college documents</b> We were aware that many colleges have failed to implement the potential of SharePoint by using meta-data, and so it is hoped this project will be useful to other colleges developing their SharePoint beyond a document store.</p> <p><b>Training of staff across college</b> An element of the project was also the need to establish new training methodologies. The intention was to establish champions and ensure they are consistent in approach. The project would also build on the existing basic training programme; to provide staff with the knowledge, skills and permissions to understand more detailed meta-structure and how to manage complex libraries more effectively.</p> <p><b>Development of Online Forms</b> Although this was not a specific criteria of the original project, it has formed part of the on-going development and it is important to mention it as a success factor in its own right.</p>
Why did you go for a technology-based solution	<p>SharePoint was chosen to improve efficiency, streamline systems, use as a universal repository and to eventually replace share drives.</p> <p>SharePoint is commonly used across the sector, and yet it appears many colleges/universities fail to exploit its potential.</p> <p>This project is about making the best of SharePoint and gaining the greatest efficiencies from this Microsoft business solution.</p>
What did the project cost: LSIS funding + your organisation's contribution	<p>The LSIS grant is for a total of £6000.</p> <p>Just over £1600 has been spent on training and on-going mentoring or support from our mentor –Parabola.</p>

	<p>This has included a full days training for two staff, several online meetings and conference calls, and many email support enquiries.</p> <p>The rest of the fund has been spent in staff pay, to take the project forward and develop the training package and meta-data.</p> <p>A small amount of the LSIS grant has been used to host a SharePoint dissemination event for a local college and also the offer of running a JISC RSC SharePoint forum in the future.</p> <p>The college has paid for the release of two members of the IT services team to support the technical developments of SharePoint. This is the equivalent of approximately 2 hours a week (over approx. 20 weeks).</p> <ul style="list-style-type: none"> <li>• This has included the development of online forms, identified as a need by the staff collaborations and training that formed the original LSIS project.</li> <li>• Also this has included the high level administration and development of permission sets. Permissions will now be used as part of training in the future. Again, this need has been identified as part of the wider LSIS project.</li> </ul> <p>The college has also paid for the development of the front page of the portal, which is now a lively and continuously updated news forum for all staff. The posting of news is managed by the faculty administration staff, and all staff across college can contribute to 'Newsin90Seconds' or 'NicetoKnow'.</p> <p>The college also intends to sustain the momentum the project has generated; in further financial support for the continual development of SharePoint to its best potential.</p>
<p>Describe what you did and what happened</p>	<p>Wrote and disseminated a training programme with associated help guides for:</p> <p>Stage 2 training for administrators  Stage 2 training for end users  -Both focusing on views, additional columns, libraries and lists beyond document libraries.</p> <p>About to develop a training package for Stage 3 training, focusing on the move from MyDocs to MyContent</p> <p>Evaluated and amended stage 1 training guides for both administrators and end users</p>

Undertook a significant amount of training at stage 2:  
30 sessions run from Sept 2012-Feb2013

Trained a few 'super-users' in setting their own permissions.

Met with SharePoint administrators to support the migration of documents from the share drives to SharePoint

In some cases completely relocated Share Drive Documents to the portal and closed down shared drives.

Developed and trialled a collection of simple online forms. Including parking permit form, parking/visitor request form, accident form, sickness reporting form, educational visits form, software request form, long course application form.

Completely overhauled the college 'Publications site'. This was a historic collection of important documents and policies, centrally located on the SharePoint portal for staff to access. The process has included:

- Consistent naming conventions
- Removal, updating or linking of documents where appropriate
- Tagging and meta-data added to documents to enhance searching facilities
- Moving of documents into 'owners sites', correct permissions ascertained and assigned. Where appropriate drafting, version control and approvers assigned.
- The development of content wikis on the 'publications' area to link to the important documents, providing seamless access to the user.

Collaborated with college administration staff to develop document naming conventions for formal college documents, meetings and agendas.

Developed college appropriate SharePoint 'content types' to use with meta-data

Training from Mentor in content types and meta-data  
'Critical Friend' advice from mentor in progress with use of meta-data

Advice and guidance from mentor in 'where next'

Reviewed and gained a better understanding of the use of permissions across the portal.

	<p>The original plan was to train the trainer and develop Champions. However, due to the complexities of learning SharePoint this has not been achievable in the time scale and it has been highly beneficially to have a consistent single trainer giving the same message.</p> <p>Throughout the project the lead and Head of IT Services have had to report to the college SLT on progress and taken a lead from SLT on the next developments. Training staff was decided as a higher priority than the meta-data, and so much emphasis was placed on this element in the early project stages.</p>
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**The benefits and impact**

<p>What benefits/ impact has the project had on:::</p>	<p>a. the work/ effectiveness of your organisation</p> <p>The Training programme developed as part of this project has highlighted the inconsistencies in staff expertise and helped to minimise this with monitoring attendance and a very consistent message and approach in training. The training has very much emphasising the improvement of communications across college and using SharePoint to share important documents, information and messaging between working groups.</p> <p>An unexpected outcome has been the amazing capacity to pick up the intricacies of the system by our younger staff members and apprentices, mostly in lower grade roles. This has been recognised by managers and several of these staff have been asked to manage their department sites and have learnt a wealth of transferable skills in the process, not just in IT systems but in communicating with their peers.</p> <p>Some staff are only now trialling the use of 'draft' documents and 'authorisation' workflows. There has been a lot of positive verbal feedback in the training on how this can improve work effectiveness, especially when staff are working on collaborative documents such as course hand books.</p> <p>Faculty Administration Team Manager  <i>"SharePoint has improved the effectiveness of my Team, as we now have all documents held centrally, with only one version, rather than the document being kept in various My Doc files, across the Team, ensuring only one Master.</i></p> <p><i>SharePoint has immensely improved accessibility to documentation across FAST, along with any member of Staff across College, with the ease of setting permission levels, allowing colleagues to view and pick up work should others be out of the office."</i></p>
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b. the cost/ efficiency of activities

The development of some online forms has been fantastic and will now be developed further. However, it has been a strong learning curve in implementation, and a culture change in the staff use of online forms. There is, of course, still the issue of many paper forms still in circulation!

Comment from Head of IT Services:

*"SharePoint has provided a single useable system across the organisation which has replaced a number of other computerised and paper systems. Workflow has seen one of the greatest improvements in efficiency where we have seen quicker turnaround and less loss of forms. The system has required a different way of thinking and that has been one of the greatest challenges as it has meant a significant culture change which not all areas have managed to grasp yet. Permissions have also been problematic which has resulted in a loss of trust in the system in some areas. These issues have been / are being addressed and overall it has provided a big improvement to the College."*

Park Parking and visitor online booking form, comment from college reception:

*"the parking request form has improved efficiency as we no longer need to request further information or confirm parking requests have been actioned"*

HR Manager –Long Course application online form:

*"We used an electronic form for the Long Course application which meant that (whilst saving reams of paper), staff could monitor the progress of their application (from their own completion of the form, to line manager supporting comments, to Long Course committee sign off and agreement/non-agreement). It also enabled the Long Course committee members to view the applications on screen prior to the meeting, again saving reams of paper (not having to print each application 4 times) and meaning the meeting to consider applications was far less onerous than previous years."*

HR Administrator–Online sickness reporting form:

*"The Electronic sickness forms have made the process far more robust and easier to track completion and allow follow up"*

Faculty Administration Team Manager, online forms:

*"SharePoint's ability of InfoPath Forms, has greatly reduced the manual paperwork across College, which would have been posted, or hand delivered, which has inevitably assisted with the reduction in the completion of tasks, ensuring documentation is not lost, allowing colleagues time to become far more efficient."*

	<p>c. any other aspect of your work</p> <p>The use of meta-data has now improved the search facility on the staff portal. Staff are now able to narrow searches by department and/or policy area. This has a major benefit in ensuring staff are not wasting time trying to find important documents and becoming frustrated.</p> <p>The project has allowed for the overall reflection of how SharePoint can continue to be developed. As it has proved training and knowledge at a greater depth than most organisations would consider. It has led to the requirement to reevaluate a long term strategy for both development and support of SharePoint for a sustainable future in college.</p> <p>The project mentors have also been proactive in disseminating information about SharePoint 2013 and the use of the system on tablet and android devices. Again, something that without the project we may have been slow or unconfident to engage with.</p>						
<p>What contribution to the success / smooth running of the project was made by:</p>	<table border="0"> <tr> <td>LSIS funding</td> <td>a lot</td> </tr> <tr> <td>Your mentor</td> <td>a lot</td> </tr> <tr> <td>LSIS Associate</td> <td>a lot</td> </tr> </table>	LSIS funding	a lot	Your mentor	a lot	LSIS Associate	a lot
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LSIS Associate	a lot						
<p>Do you have any comments on the funding, mentor or LSIS Associate.</p>	<p>The funding allowed the college to progress with SharePoint at a far more rapid pace than could have happened without the funding, mainly due to the ability to use our support company for additional training and for online mentor meetings and conference calls. The funding also allowed for additional hours to be paid to a part time member of staff to focus on the project and SharePoint development.</p> <p>The LSIS associate supported the project by probing deeper into the study and highlighting the more unexpected and incidental outcomes of the project, that might otherwise have been overlooked.</p> <p>It has also been beneficial to have someone read over reports and conference papers.</p> <p>Most importantly the LSIS associate has reminded us about the importance of impact when conducting a project and study and questioned this throughout the process.</p>						

<p>What lessons did you learn / what tips would you give to other providers</p>	<p><b>Project tips</b>  Keep in mind that the impact of the project is the most important factor.  Be clear about who the project lead is  Have a critical friend, even if it is someone in the organisation – like SLT or another manager</p> <p><b>SharePoint tips</b>  SharePoint is complex and takes time to learn and understand. It is not a system that can be successfully implemented fully.</p> <p>It is important to see good practice and join a user forum, it will give you lots of hints and tips to move forward</p> <p>SharePoint needs someone to manage. Some time has to be allocated to technical administration and someone to train staff.</p>
<p><b>Telling others</b></p>	
<p>What have you done to share /disseminate this project with others in the sector</p>	<p>Karen Foster participated in the LSIS Technology for Success Conference in February and provided a conference workshop.</p> <p>The college has offered the use of Yeovil College facilities for a South West SharePoint forum and to present at this event on the project.</p> <p>The college hosted a visit from two staff from Truro and Penwith College on Thursday 14<sup>th</sup> March to showcase SharePoint, the project and share good practice with a college who have purchased the product but not yet decided on how to implement it.</p> <p>The day covered:</p> <ul style="list-style-type: none"> <li>-A overview of SharePoint by Head of Learning Centres</li> <li>-Technical Support by IT service technician</li> <li>-Governance and moving forward by Head of IT services</li> <li>-WorkFlows and InforPath Forms by the ILT coordinator.</li> </ul> <p>The members of staff from Truro and Penwith have commented that the day has helped to bring clarity to its uses and also gave them confidence that they already have the technical skills in house to manage the system and drive it forward.</p>
<p>Provide a quote on your experience of the LSIS LIT</p>	<p>The project has provided an opportunity to raise awareness of SharePoint across the college community by engaging a wide range of staff in the project. It has been valuable to have the</p>

<p>project.</p>	<p>funding to undertake additional training from the mentor and to follow up the implementation with their advice and guidance from them.</p> <p>The end of project conference in Birmingham (LSIS Technology for Success) was an excellent event, which surpassed expectations and showcased some excellent project and ideas.</p>
<p>Are you happy for us to use this and your contact details for marketing and publications?</p>	<p>Yes</p>
<p>Contact details for further information</p>	<p>Karen Foster  Head of Learning Centres and Project Lead  <a href="mailto:Karen.foster@yeovil.ac.uk">Karen.foster@yeovil.ac.uk</a>  01935 845450</p> <p>Richard Cranton  Head of IT Services  <a href="mailto:Richard.cranton@yeovil.ac.uk">Richard.cranton@yeovil.ac.uk</a></p>

**Please email all case studies to [eleadership@isis.org.uk](mailto:eleadership@isis.org.uk) by 15<sup>th</sup> March, 2013**