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Subject: Review of the Effectiveness and Appropriateness of Minerva

Report by:	Director of Resources
Contact Officer:	Jeannette Anderson Corporate Systems Development Team Manager 01427 676649 Jeannette.anderson@west-lindsey.gov.uk
Purpose / Summary:	Review of the Effectiveness and Appropriateness of Minerva and future development within Sharepoint software.

RECOMMENDATION(S):
1. That Committee seek assurance from the Director of Resources that Minerva departmental champions have been appointed.
2. That Committee should encourage CLT to endorse Minerva as a corporate system and mandate the use of it.

IMPLICATIONS

Legal: None

Financial : None

Fin Ref: FIN-140-15

Staffing : None

Equality and Diversity including Human Rights :

All software development is carried out in conjunction with existing guidelines on accessibility.

Risk Assessment : Only risks if we do not continue with the system as a corporate application. There would be costs to implement an alternative solution

Climate Related Risks and Opportunities :

Not applicable

Title and Location of any Background Papers used in the preparation of this report: Leaders Panel report - Review of the Effectiveness and Appropriateness of Minerva

Call in and Urgency:

Is the decision one which Rule 14.7 of the Scrutiny Procedure Rules apply?

i.e. is the report exempt from being called in due to urgency (in consultation with C&I chairman)   **Yes** ☐   **No** ☐

Key Decision:

A matter which affects two or more wards, or has significant financial implications   **Yes** ☐   **No** ☐

1.0   Agile Working Project background – why we did it

1.1   In 2010/11 it was the council's vision to become an Entrepreneurial Council and to become more business focussed. The Agile Working Project was to help deliver this vision and the associated business case for renting out office floor space to generate income to meet the budget requirements and shortfall, and s one of the key drivers to this project. An integral part of the business case was to reduce office occupancy.

2.0   Agile Working Project background – what we did

2.1   Officers visited two other councils (Salford and South Holland) who had both delivered agile working environments and introduced technology to help deliver efficiency savings. Salford introduced us to the concept of hot-desking and reduction in desk per member of staff and how "agile working looked", along with other agile working principals such as keeping in touch with and supporting remote workers using instant messaging and desktop sharing. South Holland demonstrated a functional solution which delivered corporate communications and collaboration tools to enable work to be carried out wherever officers were located (office, home, field). It was clear that any solution would need to be web-based to cope with the often limited band-widths available and would need to provide a single, familiar method to access systems and services.

3.0   Agile Working Project – the solution

3.1   It was clear when we reviewed our findings that we could deliver the council's agile working requirement with 4 core products:

- Microsoft Exchange (email)
- Microsoft SharePoint Server 2010
- Microsoft Lync
- Microsoft Office 2010

3.2   Exchange (Outlook) is a universal standard for delivering and receiving emails. It is part of the suite of Microsoft products that enables good, efficient communications both internally and externally.

3.3   To complement this form of communication MS Lync was also implemented. Lync not only allows staff to quickly communicate with each other regardless of location, but provides managers with their team's "presence" information (important in a "lone worker" environment). Lync also allows staff to share desktops, video conference, telephone, and take part in group conversations helping to eliminate most of the problems perceived by staff if we moved away from traditional "presentee-ism".

3.4   SharePoint provides the solution to many of the core requirements and can be further developed to provide further improvements and efficiencies. Since it interfaces seamlessly to all other MS Office

products including Word, Excel, Outlook and Lync it was selected as part of the suite of products that was purchased when we upgraded from Office 2003 to Office 2010.

3.5   The original scope for using SharePoint is covered in more detail below, but the three primary / major objectives were to:

- To provide a Corporate Intranet (replacing the Abacus website hosted by LCC). It was envisioned that the Minerva Home Page would act as a Staff Notice Board being the central point for all corporate communications with the added benefit of displaying targeted information relating to individual users.

- To replace the shared drives and deliver a Corporate Filing System with:
  o Single copies of documents
  o Powerful search capability
  o full version control
  o Content types
  o Content queries
  o Corporate library

- To replace the existing laborious Committee Administration System with something that is an automated process from start (Forward Plan) to end (publishing on the Web-site)

4.0   SharePoint - why it didn't fully deliver

4.1   Usually, the use of core business systems by staff is mandatory. The use of Sharepoint (Minerva), however, appears to many to be optional and does not always seem to have the support and backing it needs from senior management. This has inevitably caused problems with adequate resourcing, training, officer support and "buy-in".

4.2   The 3 main objectives were not fully met due to a number of identified (in original scope) or perceived factors.

4.3   Identified factors:
- The use of Minerva was not mandated by CLT; other corporate systems are mandatory, and users are required to use corporate tools to carry out their duties.
- Lack of or adequate training for users.
- Filing system was not completed as per specification requirements.
- Departmental sites were created but not every department was encouraged/mandated to use them and continued to use the shared drive.
- Lack of adequate resources for development of the system. Although some departmental champions were identified and trained, this was on an ad-hoc basis.
- More focus needed to engage staff and their champions.

- There was a formal project plan to implement the hardware and software but there was no formal project plan to develop Minerva (initially).

4.4 Perceived factors:
- No change in corporate culture.
- Lack of engagement in service areas.
- Lack of driving force to implement development and change culture.

5.0 Microsoft SharePoint (Minerva) re-launched

5.1 SharePoint Server is a content and collaboration platform offering a host of features specifically developed to improve sharing information in an organisation. It provides access to all Microsoft Office products and server services through a common, familiar browser and uses powerful content tagging and search facilities to allow users to find and deploy information.

5.2 SharePoint stores information in its own database and also provides business connectivity tools to access and display data from a wide range of business systems all within the familiar browser. In short it can be the front-end for all the council's systems.

5.3 By specifying SharePoint, Exchange, Lync, and Microsoft Office we have a tightly-coupled office solution where information is created and accessed using office products staff are familiar with and which need no conversion or third-party intervention. These products were selected specifically to support the council's agile working solution.

5.4 SharePoint provides the ability for staff to work (collaborate) on a document at the same time and provides version control meaning multiple copies of document are no longer needed. This "single version of truth" supports our data protection and Freedom of Information obligations. SharePoint's offline capability further supports our agile working capability.

5.5 SharePoint provides an intranet solution that can be maintained by staff as part of their normal day to day activities removing the need for a static intranet that is invariably out of date and difficult to maintain. This intranet can be "extended" to produce an "extranet" for providing access to authenticated users from the Internet. This is ideal for allowing controlled access to our information to members and third-party partners. Out of the box features include:
- Professional communication tools including:
  o Aggregated latest news stories
  o Blogs
  o Carousels
  o Instant messaging
- A "Google-like" powerful search facility
- Video and Image libraries

- List-driven menu systems
- Content Queries to dynamically display relevant information anywhere it is needed
- Quickly created Team Sites with task management features to manage projects etc
- Task and Calendar features which can be extended by integrating them with powerful tools like MS Project, Visio, Excel and SQL Server.
- Document Libraries with version control
- Robust back-up and restore features. …. Plus many, many more.

6.0   Original Scope of Minerva

6.1   Minerva was implemented to underpin the delivery of the agile project by providing a technical solution for accessing information, developing systems and accessing documents with full audit and version control. This then allows officers to work remotely in the field and / or other locations where connectivity does not exist, and to have the capability to synchronise documents back to our servers at the earliest opportunity.

7.0   Overview of the Site and Existing Functionality

7.1   The Minerva / SharePoint system provides for a broad range of user requirements and is an integrated part of the Council's information delivery, and as such has connections with Active Directory to maintain the staffing records and permissions, online mapping to provide access to spatial information, and to pull out data from other back office systems such as Civica APP (Flare) and Idox. It is also used as a central repository for all the Corporate Governance information, and reports can be easily automated to collate data from various sources and to amalgamate into formal reports.

7.2 The systems current uses are set out below:

- Replacement of existing Intranet which was out of date
  - News items & corporate updates
  - Market Place
  - Systems Access
  - Customer Call Back System
  - Property Issue System
  - Storage of corporate information and policies
  - Alert functionality on all sites
  - Organisation Structure linked to Active Directory
- Creation of Members Extranet to provide:
  - Area based information (weekly lists, localism news, funding, neighbourhood plans, wifi location)
  - Specific mapping sites
  - Links to other sites and information
  - Year book information
 - Committee Papers & access to meetings

- o Training site (videos, presentations, forums)
  - o Customer Services information (call back system, phone lists, exercise caution details,)
- Creation of corporate sites
  - o central repository for communications and documents
  - o Training materials – videos, manuals, user guides
  - o Social Scene, rewards & recognition
  - o Health & Safety
  - o Corporate Systems Group
  - o Corporate Information Governance Group
  - o Equalities
  - o JSCC
- Performance Monitoring Sites and access to data in back office systems
- Polls and Surveys
- Corporate Governance Hub
  - o Boards, and projects, matters arising, forward plan
  - o Projects Office
  - o Audit and governance, risks, ACoPs
  - o Progress and Delivery
  - o Corporate Plan
- Departmental Sites for the migration of network drives
- My Sites to replace personal drives
- A replacement Committee Administration System is also currently under development.

8.0   Usage Reports and Take up – how it's grown

8.1   The graph below shows the take up of Minerva over the last 18 months
        and belies certain anecdotal evidence that tries to suggest that most
        staff do not access it. The graph shows the average number of unique
        users that actively access pages on Minerva in a day (workdays only)
        and shows how powerful Minerva can potentially be as a means for
        communicating corporately.
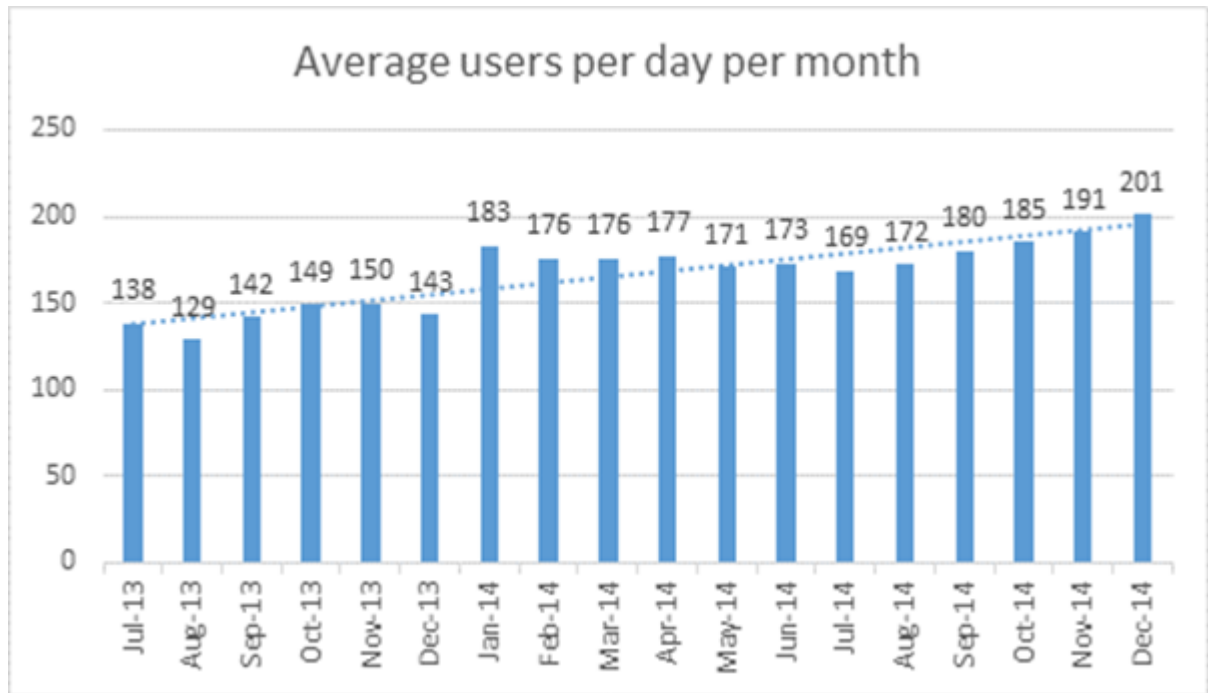
Member usage for the last 12 months. 39 members (including two co-opted
members are included in this anaylsis). 16 members have logged on and
used the site. 21 members have not logged on. Out of the 16 members who
have logged on 11 members attended the training sessions.
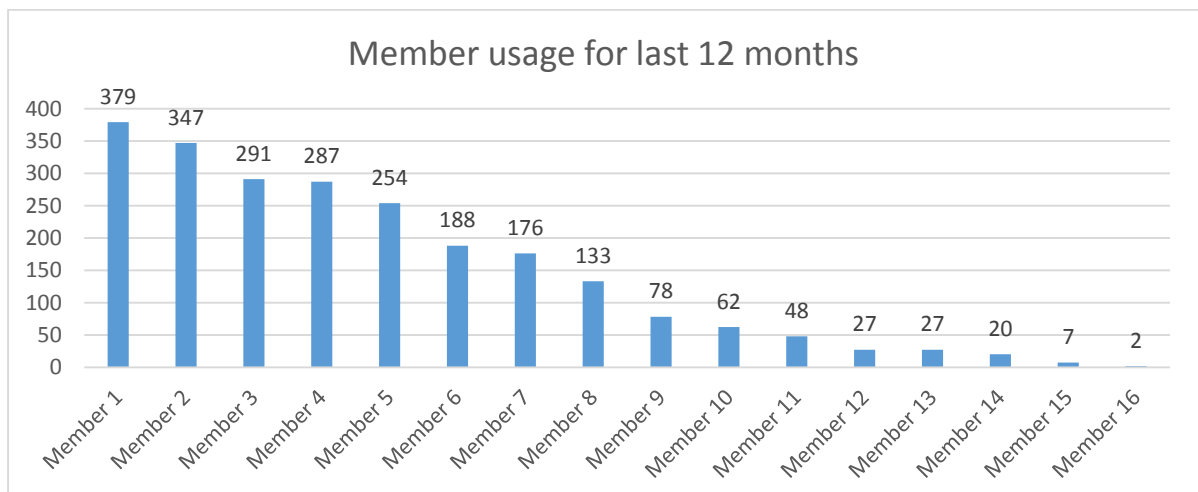
9.0   Alternative Solutions

9.1   For a number of years it has been the strategy of West Lindsey to, wherever possible, rationalise systems where appropriate.

9.2   While the individual elements identified in this report could be provided by commercial or bespoke software (Intranet, Extranet, Network Drive Storage, Committee Admin System to name a few), the cost of these systems individually would certainly exceed the cost of SharePoint software to date, and would not deliver the full scope of what we have achieved so far and what we can achieve in the future.

9.3   The procurement and installation costs of providing a range of commercial/bespoke systems would prove to be significantly more than the single SharePoint system, plus the ongoing management and development of individual systems would have a significant impact on the resourcing levels within the ICT team that help deliver and maintain these systems.

10.0   Next Steps – Future Development

10.1   The immediate road map for future developments is to completely deliver the original 3 objectives:

- To provide a **Primary Corporate Communications System** (and to replace the Intranet) – this is already fully functional across all service areas (for instance, all departments have the capability to create news items). There needs to be an appetite corporately to accept that this is the primary form of communication and to remove other internal media processes. By reducing duplication and unnecessary work for over-stretched teams we will ensure that data is held in the correct place and streamline distribution of information to staff and, ultimately, to the members through their extranet site.

- To deliver a **Corporate Filing System** with (to replace the Shared Drive):
  o Single copies of documents (reducing wasted storage capability caused by duplicate and often outdated copies).
  o Powerful search capability through the SharePoint search engine.
  o full version control - functionality is already present
  o Content types - work has been completed on this with all service areas during the implementation and development of the document management system, this needs to be replicated within Minerva.
  o Content queries - this has only partially been developed as it relies on the content types being available to create the queries.

- o Corporate library – again this has not been developed as it relies on the content types being available to ensure correct indexing of documents.

- To replace the existing laborious **Committee Administration System** with something that is an automated process from Start (Forward Plan) to End (publishing on the Web-site) – this has partly been developed in conjunction with the service area. Lack of skills in house and resources available have caused a delay in completing this area of work.

10.2   If the three objectives are to be delivered successfully, then dedicated resources would need to be identified for the period of development and system testing.

10.3   Other smaller development is planned over the next 1-3 months to meet Change Requests from service areas. This is all part of business as usual and would not require additional resources other than already allocated within the team.

10.4   There are also further opportunities to deliver efficiencies and improvements in working practices which will be taken forward as appropriate. Future development requests should be progressed through the Request for Change process and if necessary discussed at the Corporate Systems Group.

10.5   Whilst the formal project for delivering Minerva and the Extranet has now closed, ongoing requests can be made via the Change Request Form to develop more functionality if requested, or to provide information from Minerva through to our Extranet. Members have an opportunity to request development and enhancements via their extranet site (You Said, We Did tool) and any requests would be welcomed.

11.0 Conclusion

11.1   Minerva / SharePoint is a fundamental part of the council's ICT strategy, and can provide many elements of the council's current ICT requirements in a cost effective way. However, it will only be successful if the current culture for creating and managing our information and documents in the old "office-based" tradition is changed. Any change to this culture can only be achieved by taking a "top-down" approach.

11.2   It is essential that the Corporate Leadership Team endorse and mandate the use of Minerva as the primary corporate system for delivering the above three objectives. Communication of this key message will then be cascaded down from the Senior Leadership Team, through the Transformation Board, Wider Leadership Team and ultimately to each service area team manager and team meetings, to ensure a consistent approach in the use of Minerva. It is important that CLT leads on the changes needed to the corporate culture so we

all embrace the power of Minerva and effectively enhance the way we work and therefore create efficiencies as a matter of course.

11.3   Minerva will form the basis for our future network drives by delivering the Corporate Filing System. The added functionality of the "My Sites" portal (which gives every staff member their own personal site) will allow personal drives to be migrated. Department group drives can be migrated to the department sites in Minerva, with the added advantage of version control and naming conventions being invoked based on the Content Types. Because database storage of documents is extremely space-efficient we will make significant reductions in our requirements for network storage. A well-managed Corporate Filing System is also a critical element in complying with the various information-related legislation.

11.4   By properly assigning content types and metadata to documents we will significantly improve Minerva's search engine and make information much easier to find for staff. We have already started to use SharePoint Server's "Best Bets" feature to ensure that critical information such as the Data Protection Policy and related procedure documents appear first in any search for "data protection" or related search term such as "DPA". By properly assigning content types to documents and libraries we will also be able to easily display documents relevant to the page or the site by using content queries – an extremely powerful and useful SharePoint feature. An example of this would be to create a page in Minerva that automatically displays policy documents or committee papers as soon as they are added to a library.

11.5   As with any IT based system, user awareness and understanding is fundamental to its success and acceptance. Previously, a lack of training has been identified as a barrier to using the system effectively. We have started to address this through a series of activities including regular sessions at the council's wider management team, attendance at team meetings, drop-in training sessions and 'super users' being available to provide support and advice. Members have also received formal training recently both in the chamber and on a one-one basis, and as a result take up has significantly improved.

11.6   However, further training is clearly needed. This was identified in the early scoping exercise and has attracted huge criticism from officers and members of the council because it was not carried out across all areas at the time.

11.7   It is recommended that each service area has a departmental Minerva Champion, as this is a proven approach to ensure each service area has their own expert to deliver and administer their own sites and encourages greater involvement with the ongoing development.