



## **Executive Summary**

In a charge from Chancellor Wells, a Content Management System (CMS) Task Force was assembled, consisting of members from across the development, operations and end-user community to include: Information Technology, Residence Life, Integrated Marketing & Communications, Admissions, Media Services along with end-user representation from Academic Staff and Classified Staff, along with feedback from the faculty that was solicited through the Faculty Senate.

The group was tasked with the evaluation of two content management systems: the CMS currently supported by Information Technology (Plone) and the technology being adopted by several UW schools and UW System (PaperThin's Common Spot), with the goal of outlining the benefits of each system with regard to its ability to meet the business mission, marketing strategy and technology needs of the public-facing University website.

The recommendation to Chancellor's Staff is that the University move forward with a campus-wide rollout of Plone based on the investment IT has made in the technology along with the current campus usage.

The task force has developed a breakdown of resources needed to ensure that Plone:

1. Meets the integrated marketing goals for the public-facing website and the institutional marketing strategy, along with the needed resources to support the redesign project and campus-wide rollout of a CMS
2. Supports future development of an Intranet to support faculty development and administrative resources

## **Background**

The CMS Task Force evaluated both systems at a high level and established that both Plone and Common Spot are able to meet the technology needs of the University. The group primarily focused on the existing resource investment and Plone development skills versus the use of Common Spot, which is being utilized by four campuses in the UW System. The group's focus was: time to implementation, end-user experience, needed resources including the impact on cost, the long-term benefits to the campus community and the technology's ability to support the marketing mission of the University. This document outlines the benefits of each approach along with the needed resources for the external-facing website redesign project and campus-wide CMS rollout to be successful.

## **Development and Implementation Challenges**

The task force identified the primary challenges that need to be addressed in order for the external-facing website redesign project in support of IMC to be successful:

- Building of a team: the current resources available for web development allows the pace of one college and 3 department sites to be developed per year. Dedicated resources along with consulting resources will be necessary to move the project forward more quickly.
- Campus communication: a University Web Committee needs to be established to allow for campus collaboration and project communication to happen throughout the campus community.

### **Benefit(s) of using Plone:**

The argument for the Plone Content Management System (CMS) is based on the current uses of Plone across the UW Oshkosh campus, the years invested in learning and implementing complex features of the product, and the viability of the product for the foreseeable future. There are over 30 web sites out of a total of 300 websites across campus using the Plone CMS (12% of campus sites are built in Plone). Numerous offices are using features of Plone for special projects. Some of these projects include the Oshkosh Student Association online voting system, the nursing appointment scheduling, the College of Business paperless internship system, an online test with accommodations request and approval process, and numerous online surveys.

Plone was first used at UW Oshkosh in 2004 as the CMS to support a collaborative grant project between UW Oshkosh's College of Education and Human Services and the Wisconsin Department of Public Instruction. IT staff gained expertise and insights from this initial implementation of a CMS. The IT staff used Plone to assist colleges and departments looking for ways to easily maintain the currency of web-site content and restrict access to sensitive content. The ease of editing content and the effective dating features in Plone have been important factors in Plone's acceptance across the campus. This collaborative approach to solving common web site content problems also facilitated the acceptance of Plone across the campus. Over the past four years, the IT and MIO staff have developed extensive skills solving difficult problems related to online services and the overall web experience.

In 2006, several UW System campuses were considering the purchase of Common Spot. Two members of the UW Oshkosh IT staff attended a three-day training session at UW-Eau Claire. The evaluation by the IT staff was that Common Spot, like Plone, was a good CMS but did not offer significant features or advantages to warrant its purchase. The 7-page report from the training session is available if needed.

The work of the IT staff has been guided by four factors

1. The 2002 E-Services Consulting Report by Dr. William F. Hogue

The report on E-Services was the impetus for projects such as electronic imaging, e-refunding, e-billing, and on-line degree audits. The workflow capabilities in Plone were used in a pilot project for the Office of International Education (OIE). The complex workflow procedures are being tested by OIE with the expectation of having this new e-service on their web site by August 2008.

2. On-going requests for better web site functionality by departments and colleges

On-going requests by departments and colleges led to the College of Business using Plone to create an e-service to manage their internship program, and to create an Intranet to control access to its "internal-only" content.

3. The 2006 Web Evolution Project report by Oracular

The 2006 report from Oracular and the pending initiatives of the IMC underscore the need to identify the intended audience and look at the end-user experience of the UW Oshkosh "web presence." To prepare for a more consistent end-user experience as people navigate through the UW Oshkosh web sites, IT used Plone to establish a low-level infrastructure to facilitate changes across all UW Oshkosh web sites.

4. The pending initiatives by Integrated Marketing and Communications

Using the Plone CMS, UW Oshkosh has the technical infrastructure to move forward immediately with the IMC initiatives for the campus.

As an open source product, Plone's ongoing development and support are derived from a world-wide community of application developers. The collaboration and sharing of information and ideas are the basis of open source projects. Penn State has mentored the UW Oshkosh development team in its implementation of Plone. The President of the Plone Foundation has been on site for four days to give intensive training to the IT and MIO staff. Plone is a viable product for the foreseeable future.

If Common Spot is selected, it will introduce delays as staff learn and train on the new CMS while managing the transition away from Plone. Converting existing 30 Plone web sites to Common Spot will take one to two years. The least desirable situation for UW Oshkosh is to deploy and manage two content management systems. Selecting Common Spot will create discord across the University and place the campus in a transitional state for an estimated 18 to 24 months.

### **Benefit(s) of using Common Spot:**

Using the premise that time to implementation and end-user experience are critical factors in the selection of a CMS, the benefits of making the change to Common Spot outweigh the current investment by UW Oshkosh in Plone. The following benefits make Common Spot the stronger choice as a campus-wide tool to build an external-facing website:

- **Leverage lessons learned from UW schools:** Four UW Schools along with UW System have implemented Common Spot, allowing UW Oshkosh to leverage lessons learned and piggy-back off development efforts, reducing time to implementation. No other UW schools are using Plone.
- **Ongoing support network – vendor and UW System:** UW-Milwaukee and other UW campuses using Common Spot have formed a collaboration and support network in conjunction with vendor support that consists of all higher-education users (examples: University of Alaska, Cornell, Santa Clara) – regular meetings and conference calls allow knowledge sharing, which will greatly increase development efforts during implementation and for future development.
- **Common Spot meets UW Oshkosh needs:** The work done by other UW campuses has proven the concept that Common Spot has the ability to support the institution's commitment to Integrated Marketing & Communications' (IMC) web branding strategy. UWM has implemented agency-provided graphic design and sophisticated rich-media integration. This has not been done with Plone on campus to date.
- **Use of proven training materials:** Extensive training materials including online documentation, publisher training, administrator training and "train the trainer" materials are available for use from UWM and easily adapted for UW Oshkosh's use. This will greatly improve the end-user experience during a campus-wide rollout and allow UW Oshkosh to quickly establish the necessary support network needed for implementation. This end-user support does not currently exist for Plone.
- **Elegant and easy features for end-users:** Common Spot has sophisticated features needed by UW Oshkosh such as elegant rich-media integration (audio, video, Flash), the ability to build libraries of templates for users to choose from, content expiration and reminders to keep content fresh, and strong ADA compliance features, which put powerful tools in the hands of the end-users.

With an estimated 12%\* of our website currently built in Plone there is a minimal rollout campus-wide, and recent comments from a co-founder of Plone\*\* raises concerns with Plone's ability to integrate elegantly with rich-media and the questionable future of Plone as a web publishing tool. The following excerpts discuss these issues:

*#4: Rich media should be a seamless part of the Plone Experience*

*One of the major growth areas we see in the Ploniverse is the need to handle rich media in a graceful and elegant way. Audio and video data in particular, but also interactive media like Flash.*

*This presents a number of challenges on both the front-end and back-end*

*#14: Realize that web publishing isn't our main arena*

*Another slightly controversial idea. I'm not saying that we should ignore simple web publishing — simply that it's not an area we will ever be a dominant player in — and we're*

*not trying to be. A great static deployment story will help tremendously here, but there are several factors that will always make us more of a fringe player in the brochureware corporate web site / blog arena*

- While the time to implementation will be effected by the lack of Common Spot knowledge on-campus, our IT resources will be able to quickly adapt to the new technology based on existing knowledge of Plone.
- With the shared knowledge from the UW System, in addition to extensive support and training materials, UW Oshkosh will be able to move very quickly toward a campus-wide rollout of Common Spot.
- With the lack of on-campus experience in incorporating sophisticated design and rich-media integration using Plone, the time to implementation and capability is unknown.
- With the extensive collaboration with the other UW schools, UW Oshkosh will have a stronger long-term investment in Common Spot and we can confidently move forward knowing the tool can support the integrated web brand strategy.

\*Information Technology provided: 295 sites currently on campus, with 35 built in Plone.

\*\*Recent article by a co-founder of Plone: <http://limi.net/articles/18-things-i-wish-were-true-about-plone/>

**Benefit(s) of a “hybrid” of both technologies:**

The benefit of moving forward with a hybrid model would allow the campus to maintain a technology (Plone) that has strength as an intranet application as well as sophisticated workflow functionality, while gaining a technology that excels in rich-media integration, and high-end marketing sites (Common Spot).

The concept of utilizing a combination of Plone and Common Spot was discussed in detail by the Task Force. The group agreed that the necessary maintenance of two separate content management systems in addition to the negative impact it would have on end-users needing to use both tools out-weighs the benefits to the institution that a hybrid would provide.