

Rolling out Plone to a Campus

A Grass-Roots Effort

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UW Oshkosh

- 12,700 students
- 3rd largest campus in University of Wisconsin System
- About 400 web sites of varying size, currency, aesthetics
- Decentralized authority: 5 colleges
- Very small centralized IT

Major Plone Milestones at UW Oshkosh

- Feb. - Sept. 2004: 1st Plone site (WIDA) development, goes live
- 2005: WIDA support, twisting arms
- Spring 2006: online voting site, PloneSurvey site
- Summer 2006: handful of department sites; campus “integrated marketing” initiative; web site inventory
- Fall 2006: we get bootcamped!
- 2007: several department & residence sites, formation of Integrated Marketing, committee work

Milestones (cont'd)

- Early 2008: hiring of web brand manager, College of Business intranet
- Summer 2008: formal decision to go with Plone, funding
- Fall 2008: formation of web leadership team, some hiring
- Late Fall 2008: design chosen, skin product development, Dec. 19 /home goes live
- 2009: prioritization of sites, division of internal vs. external sites, control issues, intranet task force, self-service option

Before

- Hand coded HTML, Dreamweaver, Contribute
- Lots of content out of date
- Hard to navigate, hard to search
- Inconsistent appearance, often not pretty
- Could do better at drawing in prospective students

After (Early Stages)

- Content is easy to update
- Easy to navigate (more consistent), easy to search
- Aesthetically more pleasing and consistent
- Speaks to external audiences much better
- Easy news, events, RSS capabilities
- Several workflow apps (custom content types & custom workflows)
- Intranet use at college & department levels

Future

- Full rollout of a campus intranet
 - Primary audience: current students, faculty, and staff
 - More quick/easy access to information
 - Organized/customized work processes
 - Online forms, more workflow apps
- Integration with other campus systems: PeopleSoft, contact management

Who at UW Oshkosh

- IT (programming & Zope monkeying: 1-2 full time, 1 student; servers: 1 part time; skinning: 1 full time, 1-2 students; training: 1 part time; support: shared)
- Integrated Marketing (web branding & project management: 1 full time; research & copywriting: 1 full time; site structuring, visuals, skinning: 1 full time)
- Residence Management Information Office (programming, servers, skinning: 2 students, graphic design: 1 part time)
- Reeve student life center (programming & skinning/visuals: 2-3 students)
- Our clients across the campus (part time, full time, students)

Overall Recommendations

- Use grass roots marketing to get early adoption and support for Plone
- Sell standard CMS features, and/or upsell with workflow apps
- Get executive interest, sponsorship, and funding via ROI or “transformative” pitch; address the politics
- Remember you are there to help
- Treat internal and external sites separately

Overall Recommendations (cont'd)

- Establish management groups that will act as a forum, handle competing needs, prioritize, make decisions, get buy-in from all stakeholders
- Establish a clear reporting structure
- Incremental rollout of features (evolving model); controlling good and bad expectations
- Communication strategy: open process; inform all stakeholders regularly of milestones and progress; push decisions out to stakeholders where possible

Recommendations for External Sites

- At UW Oshkosh: leadership team & management committee
- Focus on drawing in prospective students, staff, faculty, parents, alumni, donors, community engagement
- Have team members dedicated to this aspect (text, visuals, writing style, audience knowledge)
- Research marketing, functionality, usability of other similar institutions' sites
- For skin designs: use focus groups; require a minimal standard; give freedom to units for everything else (forcing a corporate identity potentially very political)

Recommendations for Internal Sites

- At UW Oshkosh: Intranet Task Force
- Consider the needs of your current students, staff, faculty
- Functionally driven, less so by the visuals
- What information do they look up or use regularly?
- Killer apps: central descriptions of business processes, forms, workflow apps, collaborative workspaces
- Harness the power of user contributed content

Recommendations for Infrastructure

- Server setup and tuning
 - Lots of memory, cacheing; reduce write contention (write-heavy sites)
- Site provisioning
 - Productize skins; automate as much as possible; track your sites systematically (products, owners, versions)
- Server, Zope, Plone, product, site upgrades
 - Keep the number of Plone versions down

Recommendations for Support

- Training sessions
- Documentation: user guides
- Support for users, developers, site owners:
 - email lists
 - chat room
 - “Slow Jogs” - monthly meetings (presentations, Q & A, free form collab work)

Site Deployment Models

- “One massive Zope”
- “One virtual server per Plone site”
- At UW Oshkosh: “A few large Zopes”, each running 20-50 Plone sites
 - 2-5 ZEO servers, 2 ZEO clients
 - pound, squid, apache, LDAP

Funding Models

- “No funding” (in your spare time)
- “Client pays”, or chargebacks
- General IT funding
- At UW Oshkosh: general IT plus web migration project funding; no chargebacks

Known Unresolved Issues

- What about content that is for both internal and external audiences?
- Organizational structure: who calls the shots?
- Project management: coordination, project communication; obtain and use input from all affected parties
- Control vs freedom: how different can a site look, who can write the content
- Queues: be honest about wait times and resource constraints; ways of reducing wait times

Questions?

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