

# Crafting a Governance Plan as a Leadership Team: Project SharePoint 2013

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# Overview

- Historical
- Eight Stages of Large Scale Successful Change  
(Kotter & Cohen, 2002; Kotter & Rathgeber, 2005)
- Building The Bridge As You Walk On It  
(Quinn, 2004)
- Change On Top of Change SP 2010 – SP 2013
- Taking Ownership: Assignments
- Crafting the Document
- Challenges and Pushback (Ben Garcia)
- Editing, Current Status, Evergreen
- Questions?

# Historical

- OIT Running SharePoint 2010 – Numerous Fix it and Training Needed Service Request Calls
- No Ownership or trained support for those service request calls
- One true Infrastructure staff member and creative support staff on the Project Management team
- Creative staff lacked training on technical issues; infrastructure and technical support trying to decide who is truly the solution provider
- QUESTION: Whose role? Infrastructure? Communications and marketing? Customer support? Project management? Human resources and training?
- Plenty of crossover but no *ownership*

# Eight Steps/Stages for Large Scale Successful Change

1. Create a Sense of Urgency
2. Pull Together the Guiding Team  
*Make sure you have the right people on that team.*
3. Develop the Change Vision and Strategy
4. Communicate for Understanding and Buy In
5. Empower Others to Act
6. Produce Short-Term Wins
7. Don't Let Up
8. Create a New Culture  
*We will look at each of these steps along the presentation*

Kotter & Cohen, 2002; Kotter and Rathgeber, 2005



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# Big Changes and the Sense of Urgency

- First Change Boot Camp: 10 trained in-house at UTSA for the equivalent cost of sending 2 out of state for training.
- New Experience for National Training Company
- Thinking outside of the box. Many vendors will change what they normally do to work with a state agency.
- Trendsetters for new model

## **BUT!!!**

- Still had some No No's on team (Kotter & Rathgeber, 2005)
- Our Leader (CIO) alleviated that issue and the website work shifted to ensure every unit now took ownership
- A representative from each unit was required to attend SharePoint training.

# Create a Sense of Urgency (Times 4)

- Lack of a Governance Document created the sense of urgency for us since we were told this was the heart of a good SharePoint site.
- Changes in department staff increased that urgency, we lost several of our Boot Campers to competitors and other state agencies (There is Value in Knowledge)
- The biggest urgency was in the planning for university-wide training (Contractors needed the plan)
- The decision to be one of the first universities to move to Office 365 in the Cloud (this meant SharePoint 2013) meant many governance issues to consider.

# Importance of the Guiding Team

- Boot Camp group reported on their training experience to the full management team.
- As noted earlier:
  - ❖ *Make sure you have the right people on that team*
- Members of Top Two Tiers of management were selected to guide the process.
- Once again, support from CIO (top area manager) is vitally important and we had this from day one.
- Boot Camp team assisted management to begin to layout the plan for managing SharePoint calls university-wide, and thus  
“THE GOVERNANCE DOCUMENT”

# Develop the Change Vision and Strategy

- Some form of **Governance Document** was needed to help shape the Vision and Strategy.
- Informal Governance Policies were in place from the Infrastructure perspective, but no broad based understanding or collaboration with other areas existed.  
(Ben will discuss the importance of this to support services)
- Training of University staff needed, communications and marketing on the tool needed, and ownership for setting up and support of the growing requests for team and individual sites had to be addressed.
- **THE VISION:** Staff trained university-wide on SharePoint to reduce touch service calls to OIT departments and expand usage of SharePoint
- **The STRATEGY:** Involve all OIT areas in crafting the document to create understanding, knowledge, ownership, and expanded use of SharePoint university-wide: Buy-in



# Communicate for Understanding and Buy In

- The entire department was invited to the table to send a representative for Boot Camp Training, and to include input on the Governance Document
- Each Area was given a part of the document, where relevant, to provide input.

## *Working Document on Hand*

- Even areas with no direct relevancy were invited to communicate by asking questions and providing ideas for marketing, communication, and university-wide training.

# Empower Others to Act

- Inviting and communicating with all areas at the table, even those without direct impact
- Involving staff members outside of the core management team to participate in the process. *(Coordinators, PMs, Analyst, etc.)*
- Inviting others who were moving ahead of the department to share their successes in our gatherings.  
*(This empowered and challenged our team, PS and ITAs)*
- *Who is supposed to lead the way?*

# Produce Short-Term Wins

- Boot Camp was the first Short Term Win (STW)
- The base Governance Template from the Boot Camp provided the group a place to start.
- Communications team takes on the leadership role (Sigh of relief heard across campus: OIT departments and HR)
- Assignments giving everyone a chance for involvement and buy-in
- Moving the Base Template from the raw document you see here to something that reflected OIT and UTSA

# Don't Let Up

- Important: We started this process close to 2 years ago.
- We kept our mind on the **Sense of Urgency** issues.
  - ✓ Service calls would continue to come in
  - ✓ SharePoint 2013 in the Cloud was coming with easier functionality and some serious marketing and training
  - ✓ Our staff needed to be knowledgeable about the products we were asking others to use.
  - ✓ Our staff needed to use the products we were asking others to use
  - ✓ Our staff and the university staff needed training
- For all of the above – We needed the **Governance Document!**

# Create a New Culture

- Not an easy step and not always accepted
- Can not complete this step without knowing and understanding your *current reality*, (Tice, 1997)
- Some of the pushback we received was smart thinking and looking ahead for potential problems by those we empowered to act.
  - ✓ Ben Garcia will touch on some this in his section
- The idea of inclusion in a process, which did not directly effect a particular department, was new to the group and made an impact on other projects

# Building the Bridge as You Walk On It

- *When we commit to a vision to do something that has never been done before, there is no way to know how to get there. We simply have to build the bridge as we walk on it. I sometimes refer to this process as ‘walking naked into the land of uncertainty’ or ‘learning how to walk through hell effectively.’*

-Robert E. Quinn, 2004

- Needed document was non-existent
  - ✓ Building new sites during process of plan development
  - ✓ Marketing the tool while in process of plan development
  - ✓ Building training courses while plan was in development
  - ✓ Working on SharePoint 2010 to 2013 conversion
- Change on Top of Change: SharePoint 2010 – 2013

# Change on top of Change

- Office 365 Launch on Campus
- Dependence on Microsoft Cloud Tool performance & upgrades
- Microsoft Evergreen Environment
- Campus PeopleSoft training was prioritized over SharePoint to replace other university software
- Three Important Objectives in the process:
  - ✓ Helping people who are assigned to lead change
  - ✓ Providing a *new language* for people who are already engaged in transformation
  - ✓ Helping individuals to transform themselves and others

Quinn, 2004

# Taking Ownership: Assignments

- If you Talk the Talk then you must Walk the Walk
- Why should I listen to you?
  - ✓ Establishing credibility
  - ✓ *Your actions are always more influential than your words. It doesn't matter how good what you say sounds to others. If it's not in line with your behavior they will eventually see through you. What matters, most of all, is what you do.*
    - Lou Tice: The Pacific Institute, 1997
- Assignments pushed down from managers to staff (Be careful)
- You must regroup as a team to collect needed data in an active role as a manager.



# Taking Ownership: Assignments

- Understanding the limits of hierarchy in this fast past world. (Kotter, 2014)
  - ❖ Networking to get things done
  - ❖ Utilizing a well designed hierarchy
    - ✓ Allowed us to see where we were strong
    - ✓ Allowed us to work on the weak spots
    - ✓ Allowed us to identify strong performers
    - ✓ Allowed us to develop and create new and exciting units to expand in the future

# Crafting the Document as a Team

- Each department manager, at all levels, received a template for review
- A full management meeting devoted to page by page review of template
- Follow up with Communications team over a 45-60 day period for any questions and to provide all initial data for the document
- Documents sent to the assigned communications staff for edit in the restructured template
- Restructured document brought back for comment by full management group
- Questions added by managers, mainly those who did not have direct governance but would serve as End Users and served as the voice of the End User
- Document back to the communications staff for final and Evergreen edits.

# Challenges and Pushback

**Challenge #1: Original Scope & “Buy-In”**

**Challenge #2: “We don’t have the training”**

**Challenge #3: Perception of “No Time”**

**Challenge #4: Governance & Ownership**

**Challenge #5: Sustainment**

# Challenges and Pushback

## Challenge #1: Original Scope & “Buy-In”

- System Implemented “Wide-Open”
- SharePoint 2010 Sites and Content never fully developed
- Team Managers never embraced use of SharePoint
- SharePoint site development and usage found too cumbersome

# Challenges and Pushback

## Challenge #2: “We don’t have the training!”

- Hesitation by Team Members of the “unknown”
- Despite SharePoint promotion as easy to use/setup, Team Members felt unprepared
- Training unavailable
- **Impact:** Hesitation and non-engagement of SharePoint
  - Service offered but unused

# Challenges and Pushback

## Challenge #3: Perception of “No Time”

- Due to no buy-in, it was easy to not consider it a priority compared to other tasks.
- Team Members felt there was no time to spend learning new system and dedicating resources
- Lack of Team Member resources
- **Impact:** No focus on SharePoint – site development and usage delayed

# Challenges and Pushback

## Challenge #4: Governance & Consistency

- Initial rollout of SharePoint 2010 released lacking governance
- No true owner/support/set of standards
- Users feeling “on their own”
- **Impact:** Customer support/service less than desirable

# Challenges and Pushback

## Challenge #5: Sustainment

- Non-existent on initial SharePoint release
- No support documentation provided
- High training and support demand
- **Impact:** Users feeling “on their own”



# Process: Editing, Current Status, Evergreen

- Communications Team took on editing and final formatting
- Getting staff to respond, even managers, proved a challenge
- Can the Writers and Editors write the technical content?
- Getting rid of the irrelevant (Ex. Global for the Present)
- Staff changes (Priority in Workload, Temps, Writer, etc.)
- Current document on display (98% Complete)
- Evergreen format (Needs a quarterly visit for the future)
  - ✓ Define
  - ✓ Microsoft Initiatives

# Summary

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# Documents Available

- Boot Camp Template: Mark Weinstein – ASPE-IT (2010)
- Boot Camp Template with Assignments
- Version One: Overkill!
- Version Two: Defined, Refined and Edited
- Version Three: Re-Edit and Questions
- Version Four: Re-defined Re-refined, Re-Edit, and more Questions
- Version Five: Current Evergreen Document

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