

In-Form Consult helps charity transition into brave new world of EDRM in SharePoint

“The Proof of Concept was a great success and we continue to work with IFC on progressing our project. If you are looking to understand the benefits of managing information, how to turn this into practice, and the impact it can have on people, then IFC can definitely help.”

Jo Marsh, RSPB

About the RSPB

The Royal Society for the Protection of Birds (RSPB) is the UK's largest nature conservation charity, protecting threatened birds and wildlife in towns, coast and countryside. The RSPB has 200 nature reserves covering almost 130,000 hectares, more than a million members, a staff of more than 2,000 people and almost 13,000 volunteers.

In the UK, the RSPB's work includes the restoration, creation and enhancement of thousands of hectares of land to benefit people and wildlife, bringing back birds of prey and protecting wildlife across the country – from red squirrels to seabird colonies. Internationally, the RSPB also play a leading role in a worldwide partnership of nature conservation organisations to save the world's most endangered wildlife and special places.

Business Challenge

The RSPB wanted to assess the key assumptions and requirements of their Information Management (IM) Programme via a Proof of Concept that would test the management of information via a SharePoint Online environment. This was to include a corporate taxonomy, search functionality, security model and to be supported by the implementation of key IM policies. Key requirements were also described including a focus on user experience, records management and the use of a portal to navigate multiple locations.

The RSPB sought external specialist advice from In-Form Consult (IFC) and support to design the information and SharePoint architectures, and to deliver the Proof of Concept environment via SharePoint Azure, Office 365 and SharePoint Online.



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IFC Approach

To support RSPB, IFC deployed their SharePoint Information Architecture Methodology (SIAM) which incorporates the key components of successful SharePoint implementations, and is based on IFC's extensive experience supporting and delivering IM projects. The approach is aligned with industry standards such as Designing and Implementing Record Keeping Systems (DIRKS) and ISO15489, and is security consistent with ISO 27001. Prior to commencing the design and build of the proof of concept, IFC performed a detailed analysis of the business drivers and expected outcomes to ensure the solution met requirements and delivered the key business benefits.

The first stage of IFC's approach involved designing the site and library structures, and the development of the security model. Throughout these activities IFC focussed on delivering a solution that was sustainable and that would provide the platform for further deployment. The records management approach was defined including the method of record declaration, content routing of separate records that are no longer active and other requirements such as legal hold.

Governance requirements were considered relating to auditing and reporting, followed by analysis of the requirements for core functionality including content types and metadata, version control and workflows. A strong focus was placed on searching, as the ability to quickly and accurately locate records via a search is a significant factor in user uptake of a new information management solution.

Usability of the solution was key, so IFC ensured the user experience was as consistent as possible and focused on design elements that added tangible benefits to users.

Background

RSPB have a vision to enable staff, volunteers and partners to be part of an information culture where easily accessible accurate information is used and shared securely to support informed decision making and to enhance the delivery of the core objective – to save nature.

To implement the vision, RSPB have initiated an IM Programme which aims to build the foundations of effective information management through the implementation of:

- *Information Access & Collaboration – information is findable, unrestricted where possible, supporting a collaborative culture*
- *Information Technology – implementation of appropriate technology and tools that provide the platform for collaboration and sharing, whilst being robust and increasing compliance*
- *Information Awareness – staff and volunteers understand their responsibilities and the value of effective information management in business operations*
- *Information Governance – the framework of policies, roles and business rules that provide accountability and ownership for information management, followed by integration into working practices*

These activities needed to align to the RSPB IT Strategy which outlined a transition to the use of cloud services and Office 365.

“I knew we needed expert help to introduce some good practices around the creation, storage, retrieval and disposal of information, but it was crucial they fully aligned to our existing SharePoint investment. We were looking for a partner who not only understood that environment, but who also had first-rate specialist knowledge of Information Management best-practices.”

Jo Marsh, Head of Information Management

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The Results

The development of the Proof of Concept site structure and information architecture has enabled the RSPB to confidently move forward with their SharePoint project, armed with significantly increased knowledge of successful Office 365 and SharePoint design, and of how to articulate and demonstrate the benefits the solution will deliver to different business areas. IFC supported the RSPB to develop a Benefits Case that related the cost and impact directly to the benefits provided, and also to develop a Business Charter that supports repeatable and consistent deployment.

RSPB are now equipped to transition to the brave new world of electronic document and records management in SharePoint and to deliver significant benefits encompassing reduced cost and risk, and increased compliance and productivity, to business operations during the deployment enterprise wide.

Why IFC?

IFC is an independent information management consultancy with over 28 years' of experience supporting businesses transform enterprise-wide information into a more powerful corporate asset.

At IFC, our consultants have extensive experience providing objective advice and pragmatic recommendations to clients regarding:

- Information Strategy
- Information Governance
- Information Architecture
- Information Privacy and Security
- Information and Knowledge Management Technology
- Electronic document and records management system (EDRMS) implementations

IFC's solutions, which encompass consultancy, technology, training and resourcing services, support your complete information management needs.

"We contacted In-Form Consult because we felt that their services could support our aims. ... If you are looking to understand the benefits of managing information, how to turn this into practice, and the impact it can have on people, then IFC can definitely help."

Jo Marsh, RSPB

"Whilst we wanted to test a system, we were particularly interested in the impact on people and felt that IFC could support us in understanding this. They can support throughout the cycle of an IM project, from identifying the desired outcomes, to designing and building a system, through to changing the way people work. Although we were starting with a Proof of Concept, we wanted a supplier that could support us through this whole lifecycle."

Jo Marsh, Head of Information Management



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About In-Form Consult (IFC)

We are an independent information management consultancy that helps businesses transform enterprise wide information into a powerful business asset. We take a refreshingly pragmatic approach to helping companies uncover, manage and exploit information, transforming the value of both unstructured and structured content. Our complete solutions - encompassing consultancy, technology, training and resourcing - help to solve your holistic information management needs, help to drive innovation and create new business realities. Our consulting team are industry-leading experts in the areas of Information Management, Information Governance and Records Management; and specialists within Public, Private and Not-for-Profit sectors.