



**Content Management and Higher Education:
Solutions for Your Institution**

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Spring 2009 CMS Expo  Learning & Business Conference



GIASBEIN-GEA

"I'm a very popular business speaker. I can talk for 90 minutes without actually saying anything. That way, nobody feels guilty or ashamed for not paying attention and that's good for morale."

Introduction

- ✦ In web business for 16 years
- ✦ Commercial and educational sites
- ✦ Education in Computer Science/Networking and Data Communications
- ✦ CEO iConnect Strategies, LLC
- ✦ Director – Web Development Services at Utah Valley University

Most Importantly

- ✦ I have overseen the planning, selection, implementation, training, support, and the “hair pulling, gnashing of teeth, and therapy rehab” of 4 CMS implementations at UVU alone.
- ✦ Many more implementations in several organizations
- ✦ In other words...I have been through many times what I am going to share with you

Ever Felt Like This?



Did You Know...

- ✦ Almost every organization today understands the need for a content management system
- ✦ Every CMS provider understands the market of higher education
- ✦ Very few CM solutions focus on educational unique needs and structure
- ✦ Every educational institution is “unique”
- ✦ If I had a dime for every vendor that has claimed “designed with higher ed in mind” ...

Learning Objectives

- ✦ Overview of CMS systems - Brief
 - 7 categories of CM Products
- ✦ How to choose a CMS for your institution
 - How to conduct a needs assessment
 - How to select technologies based on your needs
- ✦ Unique CMS needs of higher education
- ✦ Most common CMS pitfalls and best practices
- ✦ Ideas to improve existing systems

Web Content Management System


- ✦ You already have one!
- ✦ Business processes, publishing processes, managed by people
- ✦ Make a new system work with what you are already doing

Build Around Existing

- ✦ Work with what you have
- ✦ Work with who you have
- ✦ A new system is to solve problems and improve, not necessarily reinvent
- ✦ New technology/system ≠ bliss and happiness
- ✦ CM package ≠ CM system

How To Categorize CMS

- ✦ By scope of management system
- ✦ By publishing process
- ✦ By pricing and license
- ✦ Hosted vs. on-site vs. SaaS
- ✦ Can you think of any more?



Categorize by Scope


Four Main Types:

- ✦ Enterprise CMS
- ✦ Web CMS
- ✦ Mobile CMS
- ✦ Component CMS



Categorize by Publishing

- ✦ Baking
- ✦ Frying
- ✦ "Parbake"



Baking vs. Frying

Advantages to baking:


- ✦ Great performance
- ✦ Separate production and delivery systems to allow you to implement best-of-breed and distribute loads
- ✦ Pages tend to be more search-engine friendly

Disadvantages

- ✦ No run-time input
- ✦ Bake-time length and rules

Hybrid: "Parbake"

- ✦ Pre-assemble as much of the page as you can to minimize DB calls at run-time



Categorize by Pricing/Licensing

- ✦ Commercial
 - Enterprise
 - Mid-cost
 - Lower-cost
- ✦ Open-Source
 - With or without support system



Categorize by Location

- ✦ On-site
- ✦ Hosted
- ✦ SaaS



How Do We Choose?

Step 1

- ✦ Learn from those who have done it before
- ✦ Identify stakeholders – get buy-in
- ✦ Inventory content, structure and processes
- ✦ **Build and prioritize your requirements**
- ✦ Develop a broad architecture of your system

How Do We Choose?

Step 2

- ✦ Review technology alternatives
- ✦ Develop and issue RFP – “short” list
- ✦ Proof-of-concept
- ✦ Check out the vendor

How Do We Choose?

Step 3

- ✦ Select a package
- ✦ Minimal licensing at first – if possible
- ✦ Train your people ASAP!
- ✦ Build Prototype (your team)
- ✦ Develop a training/support plan and system
- ✦ TEST, TEST, TEST, TEST (and test again)
- ✦ Roll out...what, when, how – already decided

Needs Assessment

- ✦ Do not base it off someone else's
- ✦ Use others for ideas ONLY
- ✦ Build around your existing processes and tools
 - Developers
 - Contributors
 - Skills
 - DB
- ✦ Get this as close to perfect...defining moment

Needs Assessment – Things to Consider

- ✦ Size
- ✦ Complexity
- ✦ Internal support resources
 - Servers
 - Training
 - Development
 - Platform known
- ✦ People – Editors
- ✦ Current tools used by editors
- ✦ Client vs. web based vs. Java
- ✦ Baked, fried, parbaked
- ✦ Hosted, local, SaaS
- ✦ File management
 - Multiple files at a time (move, copy, delete, etc.)
 - Drag and drop
- ✦ Sites within sites
- ✦ Move sites
- ✦ Access control
 - How granular
 - How to manage
 - Predefined or customizable
 - Groups, roles, permissions
- ✦ User friendly for contributors
- ✦ User friendly for admins

Needs Assessment – Things to Consider

- ✦ Accessibilities – 508
- ✦ Handle changes
- ✦ Design
- ✦ Structure
- ✦ Template based
- ✦ Content and structure
- ✦ Separate
- ✦ Reuse
- ✦ Re-purpose
- ✦ Component support
- ✦ Version control
- ✦ Interface to other systems
 - DM
 - DAM
 - Databases
- ✦ Student information systems
- ✦ Courseware systems
- ✦ Ownership
- ✦ Macro abilities for repeat processes
- ✦ Account based

Needs Assessment – Things to Consider

- ✦ Compare feature – versions
- ✦ Approval workflows
 - How
 - Customizable
 - Simple
- ✦ Cost
- ✦ Easy to use vs. feature set
- ✦ Training
- ✦ How is content stored
 - Format
 - Layout
- ✦ Menuing and navigation capabilities
- ✦ Forms capabilities
- ✦ Communication capabilities
- ✦ What technologies to support
 - CSS
 - CSS2
 - XML
 - PHP
 - CFM
 - DOC
 - PDF
 - Includes
 - XHTML (validate)

Needs Assessment – Things to Consider

- ✦ XML?
- ✦ Search and replace
 - Global
 - Site by site
 - Export results
 - Full page or just pieces
- ✦ Migration capabilities
 - To new versions
 - To different system
- ✦ Many, many more issues



Needs Assessment – Summary

- ✦ Take time to decide what you want/need
- ✦ Most important step
- ✦ Most skipped step
- ✦ Do this right, and your system will be closer to perfect 😊

Unique Higher Education Needs

- ✦ Corp. – Top Down Management
- ✦ Education – more collaboration
- ✦ Sites within sites
- ✦ Branding
- ✦ How are you structured now?
- ✦ Independent vs. one entity
- ✦ Approvals vs. freedom

Unique Higher Education Needs

- ✦ Academic freedom
- ✦ Mass contributors
- ✦ Committee based
- ✦ Buy-in is critical to success
- ✦ Shoot for the 90%
- ✦ More like herding cats
- ✦ As far as CMS goes, educational not as structured as corp.
- ✦ Constant change in structure and direction

Choosing CMS for Higher Ed

- ✦ Ensure feature set fits your structure and environment
- ✦ Check out experience of vendor in higher ed world
- ✦ Get testimonials and recommendations from other institutions
- ✦ Know your migration options – in education...things change

Most Common CMS Pitfalls – #1

- ✦ Picking a CMS product BEFORE developing a requirements document or completing a needs assessment

- ✦ Best practice:
 - Why you want to do this
 - What you expect to gain
 - What is it that you truly need

Most Common CMS Pitfalls – #2

- ✦ Trying to start with a complex system all at once

- ✦ Best Practice:
 - Use prototypes, proofs-of-concepts, and a phase in implementation

Most Common CMS Pitfalls – #3


- ✦ Love at first “site”. Choosing a CMS because you like the demo, company, or salesperson

- ✦ Best Practice:
 - Follow a thorough selection process – due diligence

Most Common CMS Pitfalls – #4

- ✦ Not involving key internal and external stakeholders from the beginning


- ✦ Best Practice:
 - Create an interdisciplinary CMS team, and involve content consumers if and when it makes sense
- ✦ Should include (but not limited to)
 - Marketing/customer relations, IT, student services/relations, faculty representation, communications, staff representation, admin representation



Most Common CMS Pitfalls – #5

- ✦ Not budgeting for services – underestimating integration and professional services needed


- ✦ Best Practice:
 - Budget approximately twice the cost for consulting, customization, integration
 - Learn from others...it will be cheaper in the long run



Most Common CMS Pitfalls – #6

- ✦ Leadership Buy-in Void – Not getting clear mandate from the top (difficult)

- ✦ Best Practice:
 - Get buy-in from functional and division leadership
 - Top management promotion throughout process



Most Common CMS Pitfalls – #7

- ✦ No Novocaine For Migration - Are always painful – Don't make it worse

- ✦ Best Practices:
 - Get existing content, updated, cleaned, eliminated, etc.
 - Content inventory
 - Budget for celebration

Summary

- ✦ CMS's come in all shapes, sizes and costs
- ✦ Start with what you need and what you want to accomplish
- ✦ Choose carefully from vendors
- ✦ Most CMS vendors do not understand unique CMS needs of higher education
- ✦ Be excited, but beware of common pitfalls
- ✦ Seek help from those experienced

Questions & Answers

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