



Case Study: Sarasota County

SOLUTION: Microsoft SharePoint® Server Portal

Sarasota County Deploys SharePoint to Stimulate Collaboration and Automate

Nestled in the Gulf Coast of Florida, Sarasota is a vibrant county that has been recognized by the media (Forbes and Money Magazine) as a community that has fostered an environment friendly to business and career development. It is also an increasingly desirable destination for those looking for a pleasant retirement. The county consequently has attracted a citizenry that has extremely high expectations of government services. To address these stringent demands, Sarasota County replaced a cumbersome legacy intranet environment with Microsoft Office SharePoint® Server 2007 technology that not only enables collaboration, but has led to reductions in infrastructure cost and complexity.

BUSINESS SITUATION

Keeping up with the latest in enterprise technologies is always tough. But it is particularly difficult to justify frequent technology refresh cycles when you are a county government. Unlike the private sector – where calculating return on investments can be tied directly to new revenue generation or client retention – the metrics for county government technology investments can seem less clear.

But do not try to make this point with Bob Hanson, Sarasota County's CIO. In 2005, Hanson was recognized by Government Technology Magazine as a top "Doer, Dreamer and Driver" for harnessing critical information technology (IT) to address critical county priorities. He has also been recognized as one of the top information officers in the U.S. by Federal Computer Week, for establishing a comprehensive collaborative framework between Sarasota County Government and the Sarasota County School system to improve services while reducing costs.

The two agencies entered into an agreement to share a CIO so both could benefit from his expertise, collaborate on developing technology services, avoid duplication of effort and cultivate efficiencies of common leadership in the technology arena.

It was consequently not a big surprise – when he turned his attention to the legacy intranet system used by Sarasota's 2,500 employees to coordinate their activities – that he determined it was time to make a change. The system that he wanted to replace was a 1990s vintage Application Service Provider (ASP) system that delivered limited functionality and was difficult to use. He thus tasked a team of county technologists to review the county's operational requirements and then re-engineer and replace the system.

"The intranet we were using was really a running list of links that offered a very limited document repository area," says Rick Jardine, one of Sarasota County's web development professionals involved in the cutover. As a result, it did not offer a lot of context or functionality to help county employees find information, share ideas, and coordinate workflow.

In addition, the old technology was complicated. The legacy intranet was in fact made up of several different systems that had been cobbled together over the years."

It was a mish-mash of different applications and technologies that were supported by different groups of people within the IT department," explains Tezra Felix, an online communications specialist for the county. "That meant that if IT staff shifted or moved to another opportunity... whoever was left behind did not have a very good idea of how the coding really worked."

Sarasota County

Building a Better Community

ABOUT SARASOTA COUNTY

Sarasota county is on the Gulf Coast of Florida and is home to a vibrant community that has attracted the business community and fostered opportunities for career development.

BENEFITS

- Better employee collaboration
- Improved service to citizens
- Reduced operational costs
- Optimized use of technology

WHY TRIBRIDGE?

- Proven experience in the state and local government industry
- Solid reputation with Microsoft
- Collaborative approach
- Fast response time
- Local presence

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As the years went by, many of the specific applications were no longer supported by vendors. And in many cases, the internal county expertise associated with maintaining some of the packages were no longer available in the IT department.

“As a result, we had to spend a lot of time re-writing code on the fly to fix things in an ad-hoc manner,” says Bill Derome, the county’s technical lead for architecture.

The biggest challenge, however, was that the old system depended on IT staff to make all edits and updates to the different intranet sites. The maintenance application for adding content and editing information was database-driven. Even the simplest update required users to go through an onerous change request process.

This not only took time, but it discouraged operational use of the intranet resources.

“One of the complaints that we would often receive was that the information on the sites was very stale. This was because it was very difficult to keep information updated,” says Rob Chestnut, an online communications specialist involved with the project.

“We were looking for a way to push the management of the intranet sites to the end-users while providing them – or empowering them – with the ability to extract more value out of these investments in intranet resources,” says Jardine.

SOLUTION

Sarasota County, under Bob Hanson’s leadership, has standardized many of its key applications on Microsoft technology. County officials consequently decided to replace the aging legacy intranet system with Microsoft Office SharePoint Server 2007. The county also selected Gold Certified Microsoft partner Tribridge to assist with the implementation of the advanced features of SharePoint, including InfoPath electronic forms, workflow and data integration.

The solution is an integrated suite of server capabilities that is helping Sarasota County improve organizational effectiveness by integrating content management and enterprise search. The technology is being used to facilitate information-sharing across organizational boundaries within the county. The objective is to use intranet resources to gather meaningful insight into how citizens can be better served in the most cost-effective manner possible.

The collaboration and content management capabilities of the solution implemented by Sarasota County provide IT professionals and developers with a couple of key capabilities. It offers:

- A platform and tool set that can be used to centrally manage server administration, application extensibility, and interoperability.
- Content managers at the county’s operational offices the ability to update, edit or delete intranet content at will.

The county is also using features of the SharePoint technology to extend business processes across the organization. By using forms services-driven applications, Sarasota County can securely and accurately collect information from all the different intranet sites without having to code any custom applications. This information can be integrated into line-of-business systems, stored in document libraries, and used to start workflow processes.

“Moving into SharePoint provided an opportunity to use the intranet as a way to collaborate and work across business centers in a more effective manner by allowing county employees to share documents quickly and safely, while synchronizing calendars and task lists,” says Jardine.

BENEFITS

The early results of the implementation have been very encouraging from both an operational and cost management standpoint.

“We have been able to achieve savings and efficiencies by consolidating the jumble of servers while supporting an enhanced level of service to our end-users,” says Derome. “And by using the InfoPath features within SharePoint, we were able to streamline many processes and automate work flow,” he adds.

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Down the road, he notes, the county expects to see additional consolidation of processes, servers as well as a significant reduction in redundant applications because of SharePoint’s ability to share key information resources.

“Moreover, we have now completely standardized on Microsoft technology...and it has been a good way to keep everybody on the same page from a usability standpoint,” says Chestnut.

The county first rolled out the solution in pilot projects at the Office of Financial Planning and Planning & Development Services departments.

“We spent quite a bit of time with them during the rollout, and we noted that the attention we gave them really paid off. Those pilot groups are really running with the new SharePoint system like crazy and have taken to it nicely,” reports Derome.

LESSONS LEARNED

The county had included in its deployment plans a broad training initiative to support the county-wide rollout of the SharePoint intranet conversion. However, unexpected personnel changes during the project created delays in the development of training materials and programs. This led to some confusion during the cutover to the new system for some of the end-users.

“That was definitely a lesson learned,” says Felix. “It is really important to have an organized and systematic approach to training staff to reduce the initial resistance that comes when you change any system,” she explains.

“This is especially important when you consider that we were replacing a fairly static page of links with a workflow tool and document library system that is task oriented,” adds Chestnut.

The county is currently developing a training manual and is conducting training classes with end-users. But it is a testament to how familiar the Microsoft ‘look and feel’ is, that for the most part, the new SharePoint application has moved forward on pace.

FUTURE PLANS

“Right now we are only using SharePoint for our intranet applications,” says Jardine. “But we do have plans to utilize this technology to integrate our different operational units more closely. Eventually we want to use SharePoint to manage our public facing web site. We want to use this to allow the public to interact and communicate better with county employees using the web site.”