

MetaVis Case Study: Citizen Schools

Business Overview

Citizen Schools is a leading national educational nonprofit organization that partners with middle schools to expand the learning day for low-income children across the country. At 37 campuses in seven states, serving 4,400 students and engaging 4,000 volunteers, Citizen Schools mobilize a second shift of afternoon educators, who provide academic support, leadership development, and apprenticeships: hands-on projects taught by volunteer experts.

Business/Technical Challenge

In 2006-7, Citizen Schools built an Intranet using SharePoint 2007 for its 500 employees to share and collaborate on materials, documentation and projects. The Intranet was architected according to best practice procedures. Unfortunately, these procedures did not enable the organization to keep pace with increasing technical demands and, more importantly, good document organization and governance. As a result, Citizen Schools required a new environment that could meet collaborative and information-sharing demands of its nationally-distributed staff.

In 2008-2009, Citizen Schools, significantly supported by Accenture's skills-based volunteering effort, developed a new framework and design for their Intranet. By late 2009, it was recognized that Microsoft's SharePoint 2010 could meet Citizen Schools' increased needs for collaboration and document management. SharePoint 2010 provides the organization with a more robust set of authoring tools, social profiles and metadata management than its predecessor, SharePoint 2007, and these functions became central to new redesign.

Key requirements for the project included implementing a robust metadata framework for all content that Citizen Schools had authored to date, and identifying, developing and implementing a plan to reorganize their SharePoint environment than finally migrate 65,000+ documents, data items, scorecards and other materials from its original SharePoint 2007 intranet to its new SharePoint-2010-based intranet. Additionally, to minimize work on the back-end, it was necessary to identify a migration method that would allow metadata to be added to documents as they were moved, rather than after the fact, to save significant time and effort.

“We knew that just upgrading to SharePoint 2010 would not solve our problems. We needed to redesign our environment and reorganize existing content as part of our migration strategy”

Will Nourse, Chief Technology Officer, Citizen Schools

Why MetaVis was chosen

Citizen Schools selected MetaVis from a number of competitors based upon its ability to exactly meet their content migration demands. Competing products provided some, but not all, of the required functionality needed to restructure the content during migration. In addition other products were prohibitively expensive and were not prepared to operate with SharePoint 2010.

Citizen Schools opted to provision several key staff with MetaVis Migrator, and two of its administrators with MetaVis Architect Suite. MetaVis Migrator was easy to use and enabled key staff to manage their own migration of content under their control, and our Administrators could use MetaVis Architect to step in when necessary.

Project Details / Highlights

Intranet content migration is never a simple process, and it was clear that MetaVis was the right choice for Citizen Schools. The first phase of the migration project was to identify all of the content that existed on Citizen Schools SharePoint 2007 environment, and to map content with owners. MetaVis Architect was used to print a site map of the environment – a map long enough to span the length of an entire conference room!

Once content and content owners were identified, migrators used the MetaVis Migrator tool to copy content from the original SharePoint 2007 environment to a SharePoint 2010 Beta 2 pass-through, adding taxonomy and content type metadata during the migration. The pass-through was used to model the taxonomy and content types for the production environment prior to availability of the public SharePoint 2010 release. This provided migration staff with significant ramp-up time (3 months) to migrate content, rather than requiring a last-minute rush.

The third phase began with approximately three weeks before the go-live date. The Migrators, along with Administrators, used the Migration tools (MetaVis Migrator and Architect) to move content from the pass-through to the SharePoint 2010 Production, which required little extra effort.

“MetaVis support for SharePoint 2010 specific features such as Term Store-based metadata and Content Types were instrumental in our migration. It enabled us to more efficiently and easily populate the content as we made our move to 2010. Support for SharePoint 2010 Document Sets enabled us to save time, as we could use MetaVis Migrator’s intuitive and simple interface to organize content, rather than requiring us to use Internet Explorer’s connection to SharePoint.”

Will Nourse, Chief Technology Officer, Citizen Schools

Benefits of Using MetaVis

According to Citizen Schools, the results achieved could not have been accomplished using any other products in the marketplace. The MetaVis Migrator tool surpasses the abilities of other migration tools in the marketplace for its ability to:

- Migrate SharePoint content, including lists, libraries and individual documents, easily from one environment to another;
- Augment content with metadata based upon SharePoint 2010 taxonomy and content types;
- To operate on a per-machine basis with relatively little training;
- To be a cost-effective solution in comparison to other products in the marketplace.

Furthermore, MetaVis excelled in their commitment to supporting high-quality products. Throughout its migration process, the Citizen Schools staff was in constant communication with the MetaVis team, which provided valuable insights into how to get the most from its products.

Ultimately, the Citizen Schools redevelopment process was successful because MetaVis was a partner. Based upon this partnership, Citizen Schools is equipped with a strong Intranet presence capable of helping the organization meet the collaborative and knowledge-sharing demands of a 21st century workforce.

“MetaVis made our move to SharePoint 2010 painless. The tools were easy to install and use and most importantly supported SharePoint 2010 specific features. We plan to continue using MetaVis to help with ongoing management and organization of our SharePoint environment. I would recommend MetaVis to anyone looking to migrate to SharePoint 2010.”

Will Nourse, Chief Technology Officer, Citizen Schools