Sample Intranet Governance Plan (Excerpt)

Developed by:

Abstract
This Plan is designed to provide your company with a standard Governance policy outline. The audiences for this guide are governance committee members, business application specialists, line-of-business specialists, IT generalists, program managers, and infrastructure specialists who are deploying a solution based on SharePoint Server 2010.
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Introduction
Purpose
This document provides a comprehensive overview of your company’s enterprise SharePoint governance plan. It is intended to serve as a core artifact to formalize guidelines and policies for the management, usage, and maintenance of your company’s SharePoint 2010 platform.

Scope
The SharePoint governance plan and information included in this document will contain guidelines, policies, and procedures for all areas of your company’s SharePoint platform, including global platform considerations as well as those for publishing spaces, collaboration spaces, applications, and social spaces of your company’s SharePoint environment.

SharePoint Governance
This SharePoint Governance Plan and associated Governance committee(s) will serve to provide a unified, centrally-governed approach to SharePoint within your company. This plan is to be core authority for all architectural, implementation, process, and policy decisions. This plan also identifies lines of ownership for your company’s business and technical teams and identifies who is responsible for which areas of the SharePoint system. The plan also establishes rules for appropriate use of the SharePoint environments.

This governance plan seeks to ensure that the SharePoint platform grows in a managed and sustainable fashion, consistent with your company’s business and operational goals and priorities. Managing this enterprise-wide system involves both a strategic and business-minded board to craft goals, procedures, and policies for the use of the system and also a tactical, technically-competent team to manage the routine operational tasks that keep the system running.

Intranet Vision
Your company’s corporate intranet will support the organization’s information management needs and provide a business framework for all business units by enabling the creation, management, and sharing of information and content - both web and document-based.

The corporate intranet will also provide application and solution services to support automation of processes and other management activities related to the company’s information and content.

Core Governance Goals
Below are several key goals for this governance plan:

- Ensure that the corporate intranet services are aligned with business objectives so that it continuously delivers business value
- Establish and enforce policies, standards, and processes necessary to ensure managed operations and growth
- Ensure adequate resource and management support for platform operation and growth
- Ensure content quality and usefulness and maintained for the life of content by enforcing quality content management structures and policies
- Establish clear decision-making authority so policy violations are managed and conflicts are resolved on a timely basis
- Provide frameworks for driving platform value and advanced solutions into organization
Core Governance Risks

The following are risks to an effective governance plan:

- Inadequate support from the business leaders to enforce proper governance
- Administrators or users refusing to abide by the given policies in this plan
- Insufficient support and resources including budget
- Return to past — deficient standards, organization, and management of content leading to reduced usefulness and business value

Governance: Committee

Guidelines for Governance Participation

Employees will be able to volunteer their services to join the governance committee if desired. Employees can contact any of the Governance Committee members directly to do so.

Qualities of volunteers for the Governance Committee:

- Strong interest in business operational improvement through SharePoint.
- Some direct SharePoint experience.
- Willingness to thoroughly consider and participate in guiding the direction of SharePoint within your company.

Committee Members

<table>
<thead>
<tr>
<th>Individual Name</th>
<th>Role</th>
<th>Email</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>ShareSquared, Inc.</td>
<td>Social; Global; Portal</td>
<td><a href="mailto:Info@ShareSquared.com">Info@ShareSquared.com</a></td>
<td>800.445.1279</td>
</tr>
</tbody>
</table>

Committee Responsibilities

- Contribute, Consider, Decide, and articulate the policies and guidelines contained in this plan
- Ensure continuing and right-sized platform support, including budgets and resources
- Regular participation in review and modifications to this plan
- Participate in platform publicity and adoption
- High-Level business needs/opportunity and identification
Governance: Standards, Guidelines, and Configurations

Global Governance
Global governance addresses designs, policies, and procedures that are of a global and platform wide scope within your company’s SharePoint environment.

Operational Management
Operational management encompasses traditional project management concerns as well as those concerns which may be more formally described as operational management - they refer to the ongoing management of the platform and not to the project management associated with the initial construction. This section is concerned with operational items which need early decision-support to promote manageability.

Direction and Decisions
All decisions about direction and involvement will be specifically governed by the governance committee.

Core Platform Goals
- Organized, Useful, Findable Corporate and Departmental Content Publishing that provides effective access to key public information
- Organized, Flexible, Effective Group and Team Collaboration Services and Spaces that improve operational efficiencies and quality
- Organized, Findable, Effective Knowledge Management services and spaces that improves product and services delivery efficiency and quality
- Effective Enterprise Social Computing Services that improve corporate communication, knowledge, and collaboration

With the possibility of a split decision based on number of individuals in the committee it is important to have one person that will have the ability to be the tiebreaker for the group. In the case of a tie over a specific issue, a person designated with a weighted vote will facilitate a tie breaker.

Communication
Communication of governance standards and polices, platform projects and direction and other strategic guidance will adhere to the following communications framework:

- Content
  - Published Governance Plan policy and standards abstracts will exist for each content area
  - Governance Announcements: up to date changes to policies and initiatives
  - Published complete Governance Plan – Portals area
- Format
  - Plan abstracts will be web page content placed within Portals and Key areas of collaboration
  - Announcements will be an announcements list in corporate portal
  - Complete plan will be Word document and HTML pages on the corporate portal
- Timing
  - Announcements will be updated twice monthly or immediately upon need
  - Plan components will be updated as plan changes
- Who
  - The Farm Content Administrator is responsible for producing and updating the governance communication
Roles and Responsibilities

See Appendix A, Roles and Responsibilities

Global Services

Restricted Services

To ensure stable and managed growth and proper alignment of organizational competencies to platform services and capabilities, use of the advanced platform services are restricted according to the following policies and guidelines:

- Out-of-Box Workflows, Advanced Web Parts, Advanced ECM
  - Initiation and configuration is limited to area content managers
  - In order to utilize workflows, Content managers must either a.) demonstrate workflow knowledge and competency to the Farm Content Administrator or b.) consume provided training/materials and verify to Farm Content Administrator
- InfoPath Forms – prohibited at this time; service will be made available Content Managers and Power Users as platform usage and governance stabilize
- Excel Services – prohibited at this time; service will be made available Content Managers and Power Users as platform usage and governance stabilize
- Business Data Connectivity Service - prohibited at this time; service will be made available Content Managers and Power Users as platform usage and governance stabilize
- Word Automation/Document Conversions Service - prohibited at this time; service will be made available Content Managers and Power Users as platform usage and governance stabilize
- Information Rights Management - prohibited at this time; service will be made available to Content Managers and Power Users as platform usage and governance stabilize

Search/Find-Ability

Following are the general guidelines for search and find-ability. Specific search designs and solutions will likely be needed in conjunction with specific content areas and goals as they develop.

Base Services

- Entry Points
  - Search Center in Corporate Portal; Center base results and capabilities
  - Global search control with results from application page
- Scopes
  - 4 base scopes will be available – all from global search controls
    - Farm Scope – All SharePoint based content across all content divisions
    - Site Scope – Content within the current site
    - List/Library Scope – Content within the current list or library (assumes list/library home)
    - People – Will search Profile store to locate people
  - All base scopes will be contained on 1 Display Group; drop down
  - Additional Scopes may be created at Site Collection levels per the collection administrators
  - The Site Scope will be the default scope.
- Results
  - Results will not be customized at this time. Results formatting and customization may occur later and in specific solutions
  - Portal Search Center results will appear within the center.
  - All other results will appear in site relative applications pages
- People Search
  - People Search will be provided as a selectable scope in the global scope
People results will be provided in an application page

Keywords & Best Bets
- Keywords and Best bets will be applied as content collections are migrated and find-ability issues are reported

Base Configurations
- Search Federation:
  - No federation will be implemented at this time, but may be as corporate search strategies evolve
- Content Sources
  - Only SharePoint farm content will be indexed at this time
- File Types
  - In addition to standard MS Office files, the following will also be indexed
  - PDF – provided by Adobe or FoxIT iFilter
- Crawl Schedules
  - A single crawl schedule crawling during nighttime hours will be implemented
  - Full crawls will be done on as needed basis;
  - Regular nightly crawls will be incremental
- Crawler Impact Rules
  - None at this time

Multilingual/Variations
Multilingual capabilities will be supported with the following configurations and standards:
- French language pack installed in farm
- Portal variations
  - Source variation at Company Portal
  - Manual replication from Sources to Variation Sites
  - Content translation process will need:
    - Owners/Translators
    - Reporting/Notifications of source updates

Global Security
Core Security Approaches and Standards are as follows
- Role-based security will govern access control and permissions.
- Publish to meet the “need to know” standards: no more, no less
- By default, permission levels will be granted by SharePoint Security groups; permissions to resources will not be granted to individuals; a group of one may be necessary
- Active Directory groups will be required for compliance reasons for some business unit areas (HR, Finance, Legal)
- Custom SharePoint security groups will follow the naming approach of out-of-box SharePoint groups – the name of the Site will be followed by the name of the group adequately describing the group’s security role (e.g. Upgrade Site Members, Upgrade Site Non-Department Members, Project Site Power Members)

Education and Training
Education and training are critical to success with SharePoint. Training gives various different users the ability to work with the platform efficiently and will increase the rate of acceptance throughout the organization...
For more information on developing your governance plan, please contact us at Info@ShareSquared.com or 800.445.1279