



INFORMATION
LEADERSHIP



Leapfrogging into the digital future

Case Study:
Tasman District Council



WINNER

Empowering
Employees

2020

ALGIM

RUNNER UP

Fast-Track
Project

Abel Tasman Te Puketea

Marahau Sea Kayaks

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About Tasman District Council

Tasman District Council [TDC] performs the functions of both a regional council and a city or district council. This includes services and facilities such as rubbish recycling, libraries and pools, dog licensing and water and sewerage systems. This means that TDC has a broad scope of activities, data sets and governing regulations.

Leaping Forward A Decade In Less Than A Year With Microsoft 365

TDC had just embarked on a project to go digital when the COVID-19 lockdown hit. With just a fraction of its people equipped to work from home, TDC stepped on the accelerator.

With tech partner Information Leadership's help, not only were they able to keep essential Council operations going through lockdown, and keep residents of the District safe and supported, they moved forward a couple of decades into the bargain.

The deployment of Microsoft 365 enabled TDC to completely transform its employee experience. The solution has made extensive use of Microsoft Teams, the Power Platform and SharePoint Online. In under 12 months, TDC was able to replace its legacy document management system and file shares with a modern digital workplace.

A role model for other councils

Emma Barrett, Public Sector Director at Microsoft New Zealand says "The TDC experience is a role model for all 77 other district councils. Cloud-based platforms like Microsoft 365...can create major benefits for public sector organisations, allowing for much greater responsiveness, collaboration and efficiency...making it easier for government organisations to focus on delivering better services to New Zealanders."



"We decided we really
needed to **take the plunge**
and jump in boots and all"

- Janine Dowding,
Chief Executive Officer

Challenges

Tasman District Council's aging systems were not meeting the needs of its employees.



Key processes such as resource consents were reliant on paper.



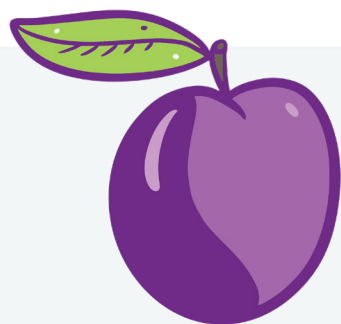
There were high demands on staff time, driven by an increase in Official Information Act requests due to controversial infrastructure projects such as the Waimea Dam and Golden Bay Grandstand.



TDC had a wealth of information, that would be useful to ratepayers, that it was struggling to present in meaningful ways.



When Covid-19 lockdown arrived only one in five staff were equipped to work from home!



Prepare to meet
DORIS!

DORIS is going to help us achieve great things. We're aiming to:

- Lead the way in openness and transparency
- Exemplify best practice information management
- Work more efficiently
- Ensure service improvement
- Foster strong partnerships internally and with our community

Microsoft 365 tools: empowering employees to do a great job



The Power Platform is empowering business analysts to deliver timely, critical, information to ratepayers.

Microsoft 365

Enterprise Search is making it easier for employees to access key information needed in Council processes: resource consents, property files, infrastructure information and contracts.



Provisioning thousands of consistent sites and Teams including autoclassification, powered by Azure based Apps.



Tools such as Planner and Microsoft Forms are providing new and simpler ways of working.



Collaboration and concurrent editing saves time and gets better results.



The legacy – and unloved – document management system has been retired in favour of Microsoft 365. 750,000 documents migrated.



Full training solution using Stream and SharePoint online is helping staff get the most from Microsoft 365.



LGOIMA. Microsoft 365 is making it quicker and easier for TDC to respond to LOGIMA (Official Information Act) and Privacy Act requests.



Lantern Celebration

Tim Cuff - Nelson City Council

Empowering Employees

The Tasman District Council deployment of Microsoft 365 shows how organisations can quickly achieve massive gains in productivity and efficiency. In addition, organisational risk has been reduced and compliance needs are now being met.





Solution 1: Consolidating Information

Giving employees information at their fingertips, no matter where it's stored



Empowering staff. Microsoft 365 provides a single place for employees to access all the information they need to do their jobs. The combined document management system and intranet is affectionately called 'DORIS' which stands for Digital Office Records and Information System. The personality is amplified by a juicy 'Black Doris' plum logo featured on staff t-shirts and posters.

The screenshot shows the DORIS Home page in SharePoint. The top navigation bar includes 'SharePoint', 'Search across sites', and various site links like 'DORIS Home', 'Search', 'Property Docs', etc. The main content area features a 'DORIS Home' header with a plum logo and a 'Private group' status. Below this is a grid of document categories, each with a list of items and a right-pointing arrow. The categories are: Community Facilities, Environmental Management, Internal Operations, Policy and Planning, and Community Wellbeing. A search bar is visible at the top right of the main content area.

Community Facilities	Environmental Management	Internal Operations	Policy and Planning
Cemetery Management >	Air >	Business Unit Support >	Activity Management Plans >
Community Housing >	Biodiversity >	Commercial Activities >	Annual and Long Term Planning >
Community Swimming Pools >	Biosecurity >	Communications >	Bylaws >
Events >	Climate Change >	Contracts and Leases >	Catchment Management Plans >
Facility Management >	Coastal and Marine >	Customer Services >	Council Plans, Policies and Strategies >
Libraries >	Contamination Management >	Executive Leadership >	Environmental Policy and Plans >
Museums >	Environment Apps >	Financial Management >	Performance Reporting >
Parks and Reserves Management >	Environmental Education >	Information Management >	Policy and Planning Apps >
	Environmental Monitoring >	Information Services >	Reserve Management Planning >
	Funding >	Internal Policies and Strategies >	Statutory Reporting >
	Groundwater >	Legal >	s17A Reviews >
	HAIL Sites Contamination Register >	Organisational Improvement >	
	Heritage Protection >	People Management >	
			Regulatory

- Peter Darlington, IS Manager

"It has become the place to go for your work - plus we got extensibility into the mobile workplace too and that's without configuration – it just comes out of the box."

EDRMS & ERP Migration

"We've pushed 750,000 documents out of Silent One [the old EDRMS] into our new system. That's no mean feat. We also store documents in our Magic [ERP] system, and they've had to come across as well to create that one-stop shop that we were aiming for" says Peter Darlington, IS Manager

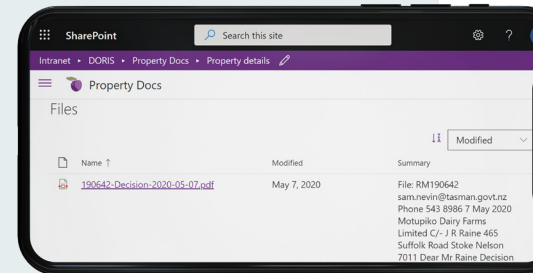
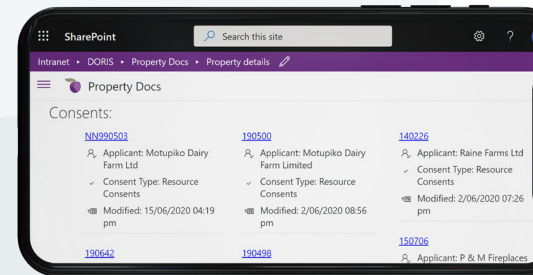
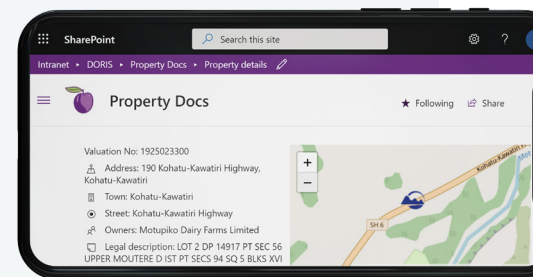
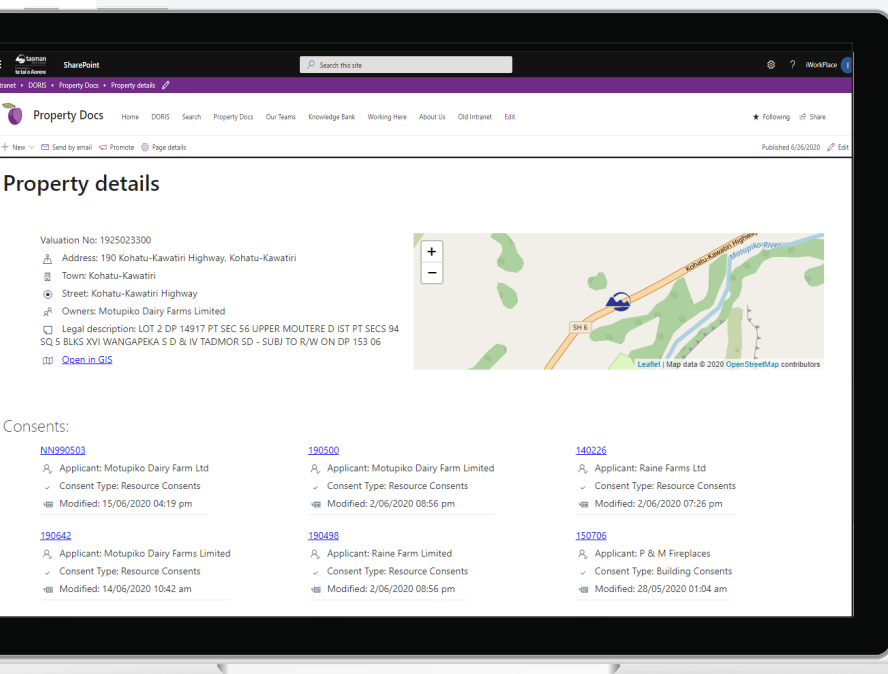
Archive Workspaces

Administration	Assets
Building Assurance	Community Development
Community Safety	Enquiries and Advice
Environmental Management	Environmental Policy
Governance	Governance Democracy
Internal Management	Leisure Heritage

Enterprise Search

“Staff are hitting the top search box and going straight to the folder they need, often surprised at how useful the results are. With a good information structure in place, they can also refine search with keywords, and as if by magic, the document they want is in the top of the queue.”

- Peter Darlington, IS Manager



Live integration with enterprise ERP...

so that case files, property data and consent processing information is available alongside information managed in Microsoft 365. This also allows staff to tag documents with property and customer IDs.

Paperless

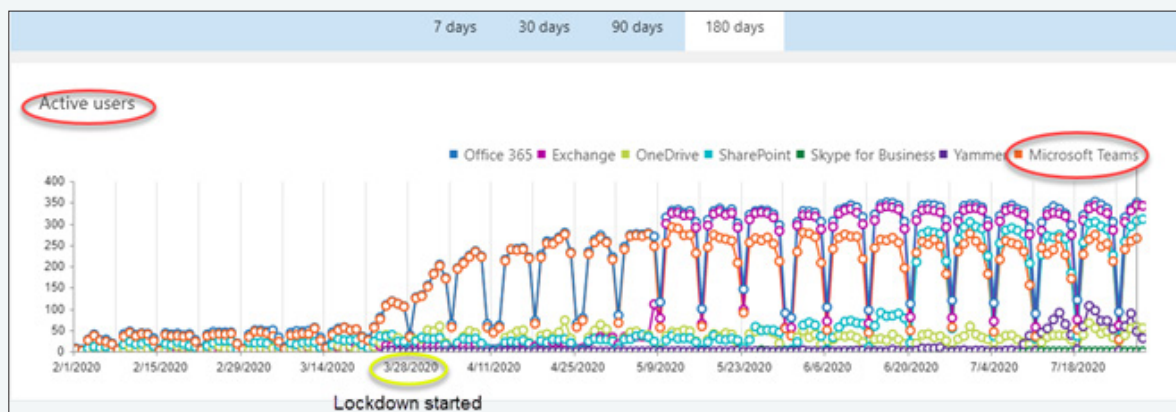
“We’re scanning all personnel files and getting those across into DORIS – we’ll be going paperless. It means we’re going to be able to get rid of about four cabinets out of the room to make room for another desk.”

- Joanna Cranness, Human Resources Manager

Empowering employees with tools that fuel collaboration and productivity

As lockdown hit TDC rapidly deployed Microsoft Teams – with Information Leadership’s Teams Framework. This meant that TDC could enjoy all the benefits of Teams without worrying about its governance and compliance needs.

Rapid adoption of Microsoft Teams by Tasman staff at the start of Covid-19 lock down and sustained use as lock down lifted



– Chris Blythe, Project Manager

“Using the mentors, we rolled Teams out to 300 staff in just 10 ten days.”



“What I’m most proud about is the way my team has taken advantage of how these new technologies can deliver **amazing outcomes for our people.**”

- Steve Manners,
Chief Information Officer

Benefits of Teams governance and collaboration



Compliance-grade document management through the deliberate design of Teams and Channels in conjunction with SharePoint Online functionality



Being able to switch to video and remote working as required for operational and Covid lock down needs



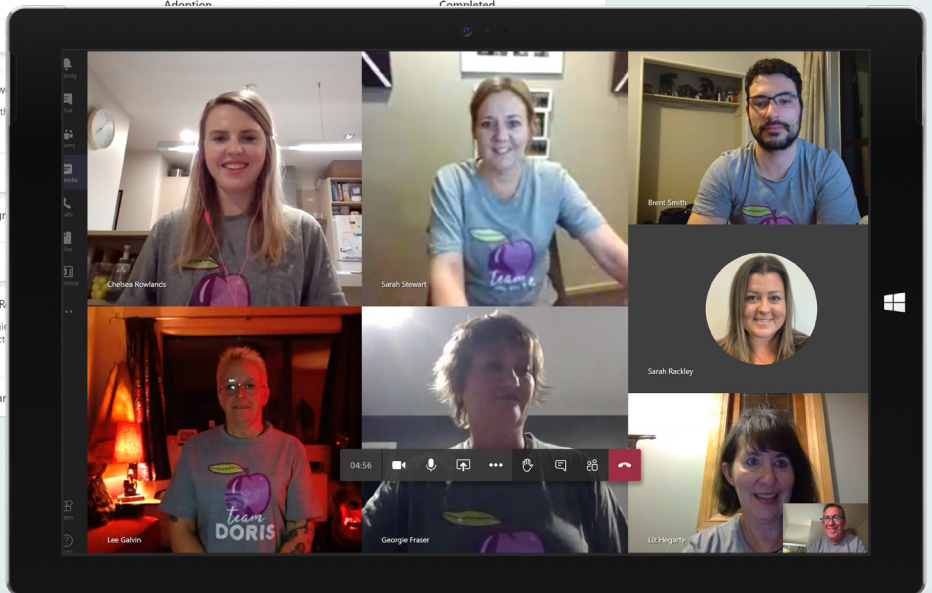
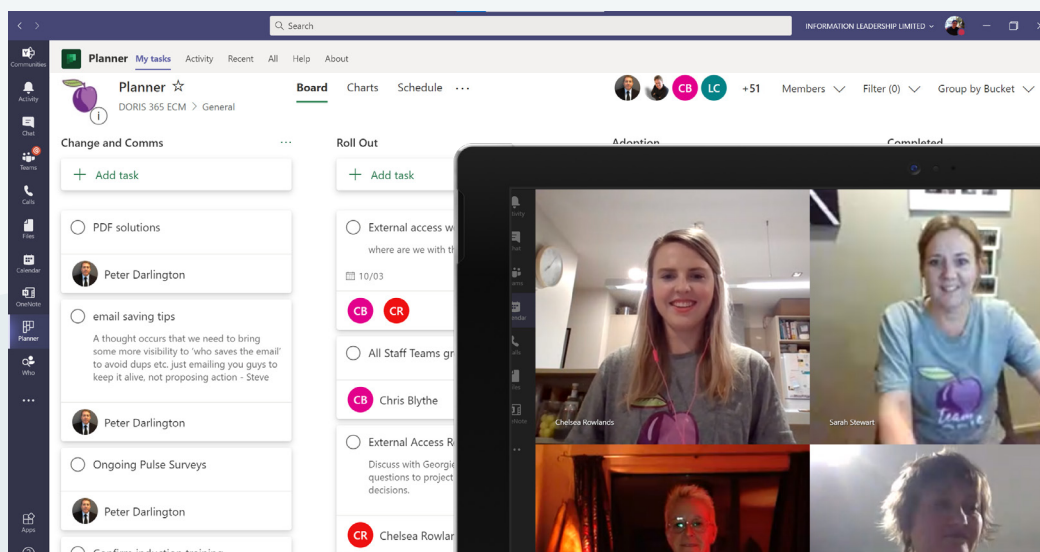
Content easy to find and no confusion about which Team to collaborate in



Content created is available to people outside the Team, as needed for medium-long term queries



Easy to use and powerful task management and coordination with Planner



Teams for +300 staff:

First ever all-staff gatherings...

“we could never do it physically before, we’re spread across 7 offices and hours away from each other. It’s awesome, the chat window is busy, and everybody’s submitting questions, and we’re saying hi to each other. It’s a nice environment. Just a few people who were absolute gif monsters, so it’s always quite funny!...”

- Liz Hegarty, Systems Analyst

Making employees aware of the power and ease of use of their new workspaces. Engaging them in the process for buy-in and growing their digital skills and confidence.

Staff Expo

Gain awareness on the why, gain feedback, increase participation and create momentum.



- Beth Catley, Change Management and Communication

Over 300 staff attended an Expo event: "We had a lot of buy-in from people who knew what we were doing now wasn't working. There was quite a lot of excitement, about the opportunity that moving to some modern tools gave us"



WHAT WILL BE THE SAME?

We will STILL be able to:

- Create and save documents.
- Create letters and templates in MagiQ.
- Access those documents from the MagiQ interface.
- Have a shared team document space.
- Link documents to other programmes.
- Identify public documents for the website.
- Make sensitive documents confidential.
- Automatically import AlphaOne documents.
- Everything you do in SilentOne, you will do in DORIS.

We STILL won't be able to:

- Access paper records digitally.



WHAT WILL BE DIFFERENT?

We will NOW be able to:

- View other people's team document spaces.
- Go back to old versions.
- Work on documents at the same time as others.
- Find documents easily through searching.
- Share documents between departments and contractors.

We NOW won't be able to:

- Have unrestricted ability to create new folders.
- Split records for one thing (like a consent) across MagiQ, network



Nearly everything is a record! If in doubt, treat it as a record (and save it in DORIS).

Use DORIS. Our policies and the Public Records Act require us to manage our info only in approved record-keeping systems - for most stuff, that's DORIS.

Think about what is being done, not who is doing it. That will help you work out where in DORIS to save information - by function not department or team.

Our information is public. There are usually only three reasons to keep information confidential - under LGOIMA, the Privacy Act and legal/commercial/financial sensitivity.

Information management is part of your job. Doing it well starts with all of us.

Choose a meaningful name. Think Who, What, Where, When and be consistent.

Teams chat is discoverable. So are any chats, emails, text messages and social media posts from Council accounts or on Council business.



Change Management Workshop

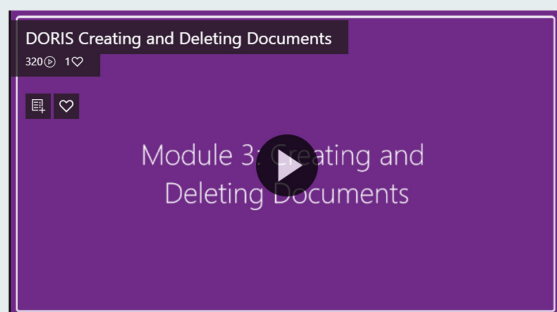
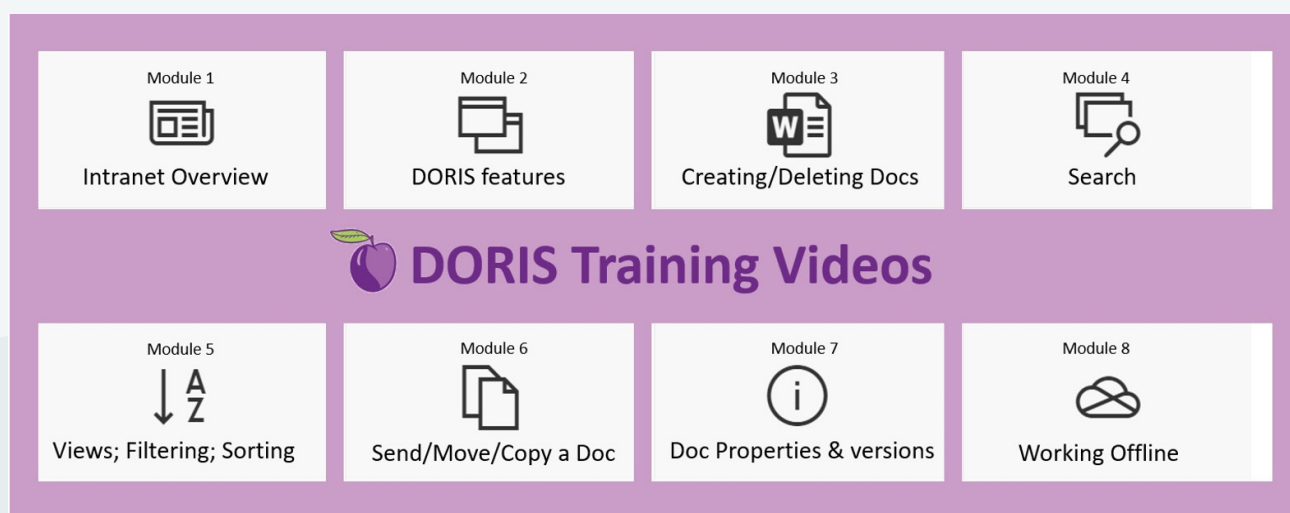
For key stakeholders and staff expected to play leadership roles in the implementation and on to business as usual.

“the workshop was really useful to introduce the concept of change management to a wider group of staff and get them thinking about how this type of project, wasn’t just a system change, it was a way of working change and a behaviour change”

- Beth Catley, Change Management and Communication

Video Training modules

Delivered via Stream/SharePoint for lockdown and beyond.



There are 10 training modules in total – the first five training modules have been accessed on average 600 times. A quiz is completed after completion of all modules to test knowledge gained.

- Janine Gillions, Branch Librarian Motueka Library

“We can access the training when we need to on DORIS, and that’s really cool because you are learning as you go”

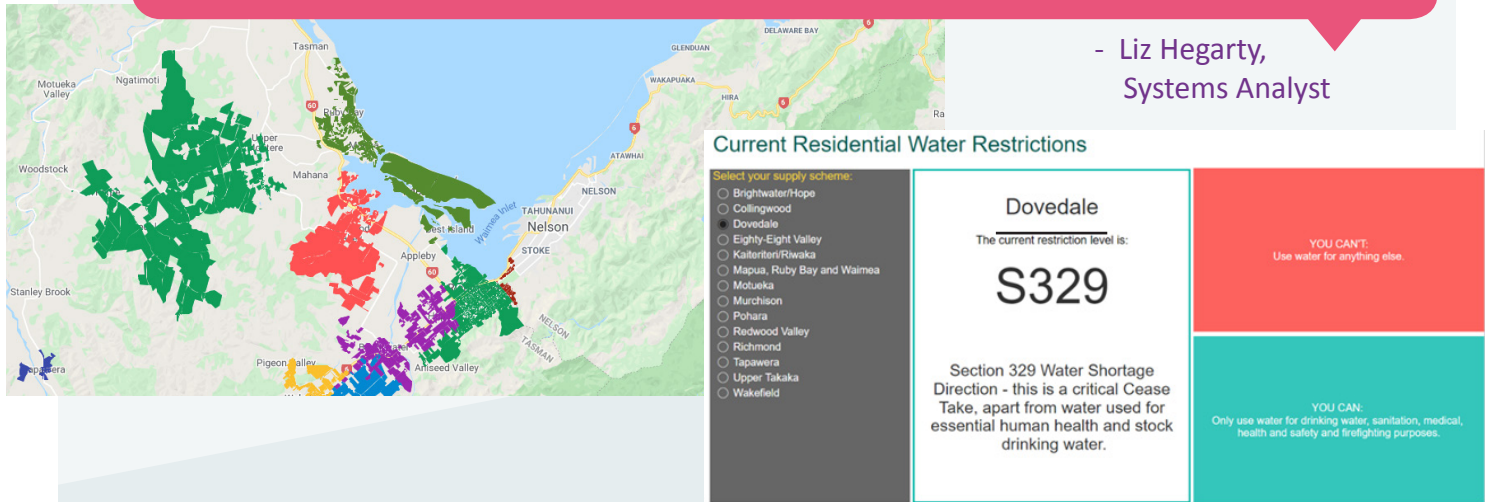
Business Analysts picking up Power Platform skills to solve real problems and allowing customers to visualise and understand community issues.

Example 1: Water Management

The Tasman region is heavily reliant on irrigation for its agricultural production. Power BI is used to provide an interactive map on the TDC website to help with water management and make it easier for residents to know if they are required to restrict water use.

“Power BI just makes life so much better. The tools that let you create channels between the outside world and your internal systems is fantastic. I’m not writing code, I’m not opening ports, I’m just writing some rules and it happens. Plus the ease of interrogation, investigation and analytics is just fun, fun, fun.”

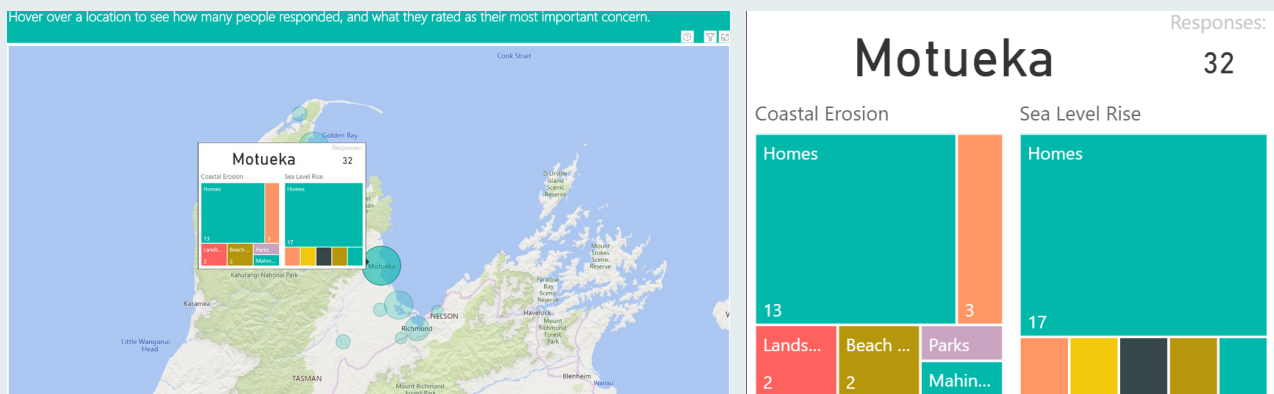
- Liz Hegarty,
Systems Analyst



‘S329’ (pictured above) requires the most restrictive water use and is used during droughts. Residents were told what they could and couldn’t use water for: red box above says “YOU CAN’T:...” and green box says “YOU CAN:...” – powered by Power BI.

Example 2 : Concerns from the community insights

An interactive map on the Tasman website shows what residents are most concerned about due to coastal erosion and sea-level rise. Through this, Power BI is providing greater transparency for Council consultation processes.



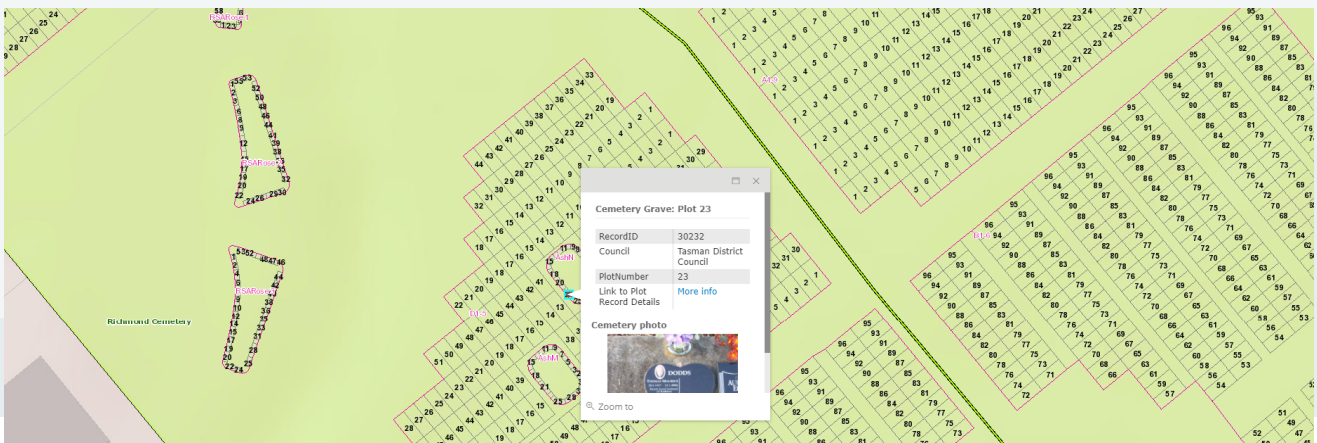
Example 3: In the field

Power Apps has made improvements possible for a range of TDC systems, especially when working in the field. Luke Chignall, Systems & Support Programme Leader recalls “we taught ourselves PowerApps using a book and the internet and built an app for cemetery photos”.

Budding genealogists can now access headstone photographs online. For staff, the app enabled them to select the cemetery they were visiting and the plot, point the device at the headstone and take a photo. At this point the user can sync the file directly to the genealogy database.

“The PowerApp was really a tool to catch up historical and missing photos. Also we could make the app available to the public if they clean up headstones and want to send us a new version.”

- Luke Chignall, Systems & Support Programme Leader



“We leapfrogged a decade, and a couple of decades worth of legacy large on-premise systems, to do something that will stay contemporary because of the way the Microsoft 365 environment is designed.”

- Peter Darlington,
IS Manager





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About Us

Let's make work better

Information Leadership is dedicated to making work better for NZ organisations.

We deliver Microsoft 365 easy & flexible solutions for users, while providing the confidence & control that information is well managed.

We use the iWorkplace[TM] advantage to harness the power of M365 at scale and get work done quicker and easier.

What we deliver for Microsoft 365 & Teams...

Easy & Flexible

ways of working &
collaborating

Confidence & Control

that information
is well managed

200+ NZ Digital Workplaces...

Commerical and utilities

Public sector including
local government

Integrated change
management &
governance

Strategy & tactics to get
the most from M365

Teams Framework
for compliance &
collaboration

Public Records Act
compliance, Retention
& Disposal built in

"We consider Information Leadership a true partner: we partner with organisations where it's a two-way street ... We want the people we select as partners to be part of the team."



James Blair, Head of Information Management & Technology



"Thanks to the whole Information Leadership team for your help and support. We wouldn't have achieved anything like the outcome we have with anyone else but you guys. Truly awesome!"



Steve Manners,
Chief Information Officer



"The partnership we formed with Information Leadership has been collaborative and responsive - where everyone without exception has been willing to 'roll up the sleeves' when needed to get the job done. Information Leadership has both the experience of the Microsoft solution and the local government sector and its unique needs."



Ewen Church,
Chief Information Officer,
Te Poumatua Āpiha Puna Kōrero



"Working with Information Leadership was a great partnership – we were working together on a shared journey, not telling each other what to do. Responsiveness of the IL team is super fantastic... I respected the knowledge IL staff brought into the workspaces."



Naomi Aporo,
Group Programme Manager



"Our Board was extremely impressed with the solution and ease of accessing their Board papers. We got a top class service and solution from Information Leadership which leverages M365 technology perfectly."



Jeremy Clement,
Financial Controller



"Information Leadership exceeded our expectations. They took a "no barriers to delivery" approach, helping us with internal technical issues and working extremely well with a complimentary vendor. Their great people made it easy for us to succeed together."



Justine Auton,
Service Delivery Manager



Our People



“When it comes to moving an organisation, like Tasman, with **serious information management** and transparency needs it’s hard to imagine working with an organisation who’s more on top of it than Information Leadership...

The expertise they’ve got across their staff has been fantastic; the support we’ve had through the DORIS changeover - we **couldn’t have asked for more**.

Between Kristy heading it up, available all hours, all times. We had Chelsea in person, and during lockdown remotely working with us here at Tasman, **we all became like one family**.

It’s been fantastic because I don’t think we’d have got across the line without that kind of **care and attention**.

We’re extremely proud of what we’ve achieved with Information Leadership’s **iWorkplace and the Microsoft 365** application suite through the Covid crisis this year.”

- Peter Darlington, IS Manager, Tasman District Council



Co-creating Each Customer's Microsoft 365 Modern Workplace Future

Usually start with demos and presentations, then moving to scoping documents and roadmaps...

Start Engagement

What we cover

Types of solutions;
customer stories

Show what good looks like

Assess business priorities and givens

Taking into account the customer's needs & situation

Decisions on path forward

Roadmap and tactics

Implement

Support and expand over time



Microsoft Partnership

Microsoft
Partner

Gold Cloud Productivity
Gold Collaboration and Content
Gold Application Development
Silver Project and Portfolio Management
Silver Enterprise Mobility Management



New Zealand's first Content Services Partner

Information Leadership is the only NZ owned Microsoft Partner and have been members of the elite Content Services Partner Program for three years.

Microsoft selects partners in the Content Service program for their proven ability to help customers succeed and achieve more with their content in Microsoft 365.

We're recognised for our proven expertise in implementation and compliance/record management.



"It's exciting to see Information Leadership become a Charter Member of our global Content Services Partner Program. We're seeing Microsoft customers increasingly move to modern approaches to enterprise content management. It's great to know that we have a world-leading content services partner able to assist them."

- Russell Craig, Microsoft New Zealand, National Technology Officer



Empowering Employees Partner of the Year 2020 - Tasman District Council | 2019 - Todd Energy

For a second year in a row, Information Leadership was named Microsoft NZ's Empowering Employees Partner of the Year. Tasman District Council's CIO and IS Manager, Steve Manners and Peter Darlington, joined the IL team at the awards ceremony to celebrate the shared success.

"the award recognises a partner that enabled their customers to work more collaboratively. The customer's specific needs of information management, governance, mobility and collaboration were focused on and it was impressive the way Microsoft 365, Teams and the Power Platform were used to innovate."

900 public sector staff

Colossal effort has been made to share our knowledge on how M365 supports Public Records Act [PRA] compliance in Aotearoa.

This has included 900 public sector staff attending our workshops and webinars, some co-hosted with Microsoft NZ, and a whitepaper published by Microsoft.

White Paper: M365 Supporting PRA Compliance

In January 2021, Microsoft published a whitepaper, co-created with us, that documents an assessment by Information Leadership of the capability of M365 to support organisations in meeting their obligations under the New Zealand Public Records Act 2005. <https://aka.ms/NZPRA>

Supporting New Zealand's
Public Records Act
compliance obligations with
Microsoft 365

Published by Microsoft New Zealand (January 2021)



M365 & Teams NZ Roadshow

The appetite for in person workshops following the publication of Microsoft's whitepaper was huge. Information Leadership ran nine workshops with a particular focus on PRA compliance and the advanced features available in E5.

185 people from 95 public sector organisations attended nine workshops across NZ late 2020/early 2021. Each workshop ran for 3.5 hours and deep dived into aspects of practical aspects of retention and disposal in M365.

Stellar feedback was received from attendees and we received an NPS score of 8.7/10. Workshops were run in Auckland, Christchurch, Hamilton, Tauranga and multiple sessions in Wellington.



Co-hosted webinars

Two webinars on M365 supporting PRA compliance with 550 registered attendees were delivered in March and July 2021. Both webinars are available to users on demand on Microsoft.com. In these webinars, we advise how to get started with **Teams governance & compliance** and how **M365 supports PRA Compliance**.

Using Microsoft 365 in the Public Sector

– What Every CIO and Information Manager Needs to Know

“The Public Records Act focuses on accountability, transparency and governance – it’s not designed to make you do something that you wouldn’t normally do as part of being a well-run organisation”

While many agencies have their own records management systems, virtually all of them also use Microsoft 365, the world’s most widely used productivity and document management system.

Sarah Heal, Director of Information Leadership, says that most of the configuration settings helping public agencies to stay compliant with the Public Records Act are available in Microsoft 365.

“Where the complexity emerges is in actually understanding how to put those pieces together and deliver that across the organisation,” she says.



Sarah Heal, Director
Information Leadership

Information Leadership partnered with Microsoft to release a whitepaper ‘Supporting New Zealand’s Public Records Act compliance obligations with Microsoft 365’, which explains how to deal with compliance obligations under the Act in the public sector.

The whitepaper covers everything from setting up rules for retention and disposal of documents, dealing with metadata, to assigning deletion authority and applying the compliance framework across Microsoft apps such as SharePoint and Teams.

“What we’re seeing is that Teams is increasingly the new interface into SharePoint - it really is the kernel of this new way of working”

The latter, a communications and collaboration platform that incorporates messaging, conferencing and document sharing, saw its usage double to 115 million daily active users worldwide last year as it became a crucial remote working tool.

Abridged – full version available on [Umbrellar.com](https://www.umbrellar.com)
– NZ’s leading news tech platform.

Workshops: Practical Retention & Disposal for Microsoft 365 & Teams

Information Leadership is currently running a series of workshops in main centres around the country covering practical retention and disposal of information for M365 and Teams.

- 3 hour in person deep dive
- 8.7/10 – score by attendees
- 240 attendees from 110 organisations
- 9 workshops across NZ: Auckland, Christchurch, Hamilton, Tauranga and Wellington



What workshop attendees say...

8.7★

average rating



"I found the workshop very useful it gave me confidence in M365 functionality for R&D."

Susan Souren

IS Delivery & Information Manager
Hamilton City Council

"Great overview and discussion of linkages of various components - OneDrive, SharePoint, Teams. Very Practical advice and thought provoking."

Stephen Merrick

Records Manager,
NZ Super Fund

"Really enjoyed the session overall. I liked the demo of set up configuration in the compliance centre and how you explained difficult concepts simply"

Lucy D'Arcy-Young

Business Analyst Information Services,
The Lines Company

"A useful workshop - the overview of Teams, OneDrive and SharePoint R&D will help us build and improve our information management practices within Microsoft 365."

Nathan McLeod

Information Services Manager,
Central Otago District Council

"Awesome advice from great experienced people - I like that Grant and Sarah tell the facts, very straight forward talking."

Robyn Martin

Information Business Analyst,
Earthquake Commission

Next Steps

Digital workplace roadmap

Where customers need to make a business case to get off legacy systems. This includes:

- Migration of content from legacy EDRMS such as HP TRIM, Open Text, Objective
- Microsoft Teams build

New starts

Where customers have no current Enterprise Content Management System and want to embrace new modern ways of working, including Microsoft Teams.

Makeovers and restarts

Customers who have gotten off to an unstructured or poorly structured start with Microsoft 365 and now have a mess and poor findability/usability.

Migration from on-premise

Where customers have significant SharePoint on-premise ECM and wish to move and embrace Microsoft Teams and the full Microsoft 365 modern workplace. Our IP includes a 25 page whitepaper on strategy, tactics and a migration roadmap.



Read the whitepaper:
informationleadership.co.nz/go/whitepaper01

Contact us today

Free phone

0800 001 800

Email

simone@informationleadership.com

Web

informationleadership.com/contactus



 ***let's make work better***



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