



# UW KNOWLEDGEBASE

## Innovation Fund Final Report

### [Abstract](#)

Final report of the committee to promote cross-institutional use of the UW-Madison KnowledgeBase

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## Executive Summary

Knowledge management across the University of Wisconsin System is challenging, with 26 schools using several different software systems to share knowledge. University of Wisconsin – Madison has used a home-grown tool, our KnowledgeBase, for nearly 20 years to help us share knowledge collaboratively. University of Wisconsin – Milwaukee and University of Wisconsin – Madison, proposed to work together, through an Innovation Fund grant, to pilot implementation of the UW-Madison KnowledgeBase to three UW System institutions that had not used the KnowledgeBase.

We engaged with Extension, Colleges, Superior, Stevens Point, and Whitewater. Due to timing of the Innovation Fund grant occurring over the holiday period, we found it challenging to find three institutions who were interested in a two-year free trial of the KnowledgeBase. We have implemented the system at Extension, Colleges, and have a test instance set up with Superior. Stevens Point and Whitewater asked us to return after the start of the new year as a follow-up.

## Purpose and Objectives

### Solving Information Challenges

All UW System schools utilize the services of the UW Service Center, and many also make use of commercially-provided information technology services such as Office 365, Google collaboration tools, and the like. In some cases, such as with the UW Service Center and Office 365, these services and tools offer documentation to users to enable users to proactively resolve their issues without having to contact the service provider. However, depending on the university or college, it is frequently the case that individual institutions provide their own documentation in support of the service. For example, both UW-Madison and UW Milwaukee use Office 365, and both have expended resources in support of their respective Office 365 implementations.

UW-Madison has produced a knowledge sharing tool called the KnowledgeBase. Presently, several UW System schools contract with UW-Madison to use the KnowledgeBase (Extension, Green Bay, Milwaukee, Parkside, Eau Claire, and Oshkosh). Each of these institutions pays \$2,500 per year for access to a KnowledgeBase instance (and a fraction of that for each sub-site that an institution requests), which affords each institution the ability to share protected knowledge documents with their staff, while sharing public information with their general user population.

While six UW System institutions use the KnowledgeBase, many more do not. With investment from the Innovation Funding, UW-Madison and UW Milwaukee are proposing a “KnowledgeBase Encouragement Fund” that would financially encourage the use of the KnowledgeBase by more system schools by providing a pool of funding to offset the costs of implementing new KnowledgeBase sites, and training new administrators to use the KnowledgeBase. This fund would also be used to help offset the initial costs to set up the KnowledgeBase for an institution (customization and connection to authentication mechanisms). We believe that this would facilitate the extension of this service to all system schools, thus enabling and facilitating knowledge sharing between institutions.

The implementation of the KnowledgeBase across UW System would improve UWS Operations through the use of a unified tool that encourages knowledge sharing across all 26 system schools and UW Extension. This would allow improvements in administrative efficiencies as schools would not necessarily need to recreate information and knowledge that is already available from other KnowledgeBase systems at other campuses; it would also have the potential to enable System schools to repurpose the resources allocated to knowledge generation in the Information Technology space to other needs.

Our goal was to increase knowledge sharing throughout UW System institutions through additional proliferation of the UW Madison KnowledgeBase.

## Organization and Approach

### Our approach to solving the problem

Our recommendation was to give incentive to three schools to use the UW-Madison KnowledgeBase. The incentive was based on the cost to provide training and basic customization of a KnowledgeBase site, and two years free of license fee payments for the institution. This approach embraced the newest cost recovery model implemented by UW-Madison for the KnowledgeBase, which will be used for any institution signing up for KnowledgeBase services in the future.

Where, previously, our model had UW-Madison recovering all costs for the KnowledgeBase from the annual fee, we have now split our charges for implementing as follows:

- Our annual fee - \$2,500 per year for in-state public institutions – covers hosting and maintenance costs of the KnowledgeBase
- We now charge a \$500 up-front fee for training by our staff, which also covers basic customization of the look and feel of the institution’s KnowledgeBase instance
- We now charge a \$500 up-front fee for establishing and connecting the remote institution’s authentication schema to our KnowledgeBase system.

### The Original Task Structure and Results

1. The project would begin on October 7, 2015 - **ACHIEVED**
2. Sean Bossinger (UW Madison) and Beth Schaefer (UW Milwaukee) would be jointly responsible for seeking the schools who would want to join this endeavor. This would be completed by the end of Fall ITMC. - **ACHIEVED**
3. Project design and scheduling would be completed by UW Milwaukee by November 9, 2015. - **ACHIEVED**
4. Sean Bossinger and Beth Schaefer would create Project Report #1 by November 9. - **ACHIEVED**
5. Initial site set-up and authentication configuration would be completed for all three sites by December 9 by UW Madison KnowledgeBase Team – **Site selection was problematic, in the sense that two of our primary targets, UW Stevens Point and UW Whitewater, asked us to return to them after the beginning of the year. We were able to move forward with UW Colleges.**
6. Sean Bossinger and Beth Schaefer would create Project Report #2 by November 9. – **ACHIEVED – Due to the challenges with our primary contacts, we reached out to UW Superior and began engaging them. They presently have a test site up and running, and we are awaiting a decision from them as to whether they will want to move forward.**
7. Web-conference-based KnowledgeBase Administrator Training will be completed by the UW Madison KnowledgeBase Team by January 9. – **PARTIALLY ACHIEVED – UW Colleges went through this training. Due to an inability to engage with UW Stevens Point and UW Whitewater, as well as a pending decision from UW Superior, we were not able to move forward with this training.**
8. Sean Bossinger and Beth Schaefer would create the final Project Presentation and present January 18. – **Due date changed to February 15. Achieved.**

## Why this solution?

The KnowledgeBase is a broadly-used knowledge management tool used by multiple institutions across UW System. The KB allows institutions to separate information that they want to share with the public from information that they want to keep private for specific users. While other commercial knowledge management solutions exist, we consider the KB to be more of a platform through which information sharing amongst a group of schools such as UW System is encouraged and enabled. The solution is customizable (from the point of view that development is collaboratively driven by constituent institutions), and knowledge is sharable at the discretion of the specific institution that “owns” the knowledge.

The KnowledgeBase, however, is not yet a universally-accepted tool across UW System, and is not mandated for use. Our proposal was submitted with the thought that were we to use funds from the Innovation Fund, we could provide incentive for the organizations that did not use the tool to try the tool, and determine whether the tool would be useful to them. This would give them a two-year window that would allow them to examine the tool in detail, use it in practice, and make a decision as to whether to continue the use of the tool.

## Analysis and Findings

### Innovative Approaches

Our approach was to use incentive, as opposed to mandate, to increase the number of institutions who use the UW KnowledgeBase. Additionally, we decided to use services from multiple institutions, with project management being provided by UW Milwaukee, and system implementation and training being provided by UW Madison. We developed a loose project plan to ensure that we were able to work across both UW Madison and UW Milwaukee to give us the best shot at accomplishing our goal of adding three new institutions to the roster of schools using the KnowledgeBase.

### Discoveries and Strategies

The following are discoveries we made throughout the project with associated mitigation strategies:

- Timing is everything – October, November, December, and January, are not the best months of the year to mount what effectively is a sales campaign. Even when you're giving away two free years of software licensing, institutions have much to consider when implementing the KnowledgeBase, and the plethora of vacations and absences that occur during the end of the year made this initiative somewhat of a challenge.
  - We reached out to all UW System institutions that are not yet users of the KnowledgeBase: Superior, Eau Claire, Stevens Point, and Whitewater. Eau Claire has chosen another strategy for their knowledge management needs, Stevens Point is in the midst of implementing a new ITSM solution, Whitewater asked us to come back to them after the new year.
  - We have a demonstration space established with UW Superior, and are currently awaiting to hear from them as to whether they will move forward with a two-year implementation.
- Free software, customization, training, and project management, while factors that are considered by groups as part of the cost of implementation, are not the total cost of implementation. In fact, institutional cost to adopt the KnowledgeBase is likely much higher than these costs combined.

## Conclusions and Recommendations

### Conclusions

From the standpoint that we have signed on one new institution: UW Colleges, and might be close to signing on an additional institution: UW Superior, we would consider our effort to be a qualified success. However, we have also reached the conclusion that additional incentive provided directly to institutions to offset the cost of implementation on the institution side could have been more useful.

A reimagined project of this nature might seek to put the capital incentive in the hands of the institutions themselves, with a qualifier that they must use the funding received to invest in a shared knowledge infrastructure of their choosing. While UW Madison's KnowledgeBase is the most frequently used knowledge management tool throughout state institutions, it is not the only shared knowledge management tool in existence.

The key to remember is that the fundamental goal of the initiative is to increase knowledge sharing throughout UW System.

### Recommended Next Steps

We recommend the following next steps:

- Continue forward with discussions with UW Superior, to determine whether they will decide to sign on with the UW Madison KnowledgeBase
- Reengage with UW Stevens Point and UW Whitewater, to determine if there is interest at these institutions to move forward with a UW Madison KnowledgeBase implementation
- Engage with institutions that have selected alternative knowledge management solutions as we seek a strategic software redesign of the UW Madison KnowledgeBase. These institutions' input would be critical to help us become a more acceptable alternative for their needs.
- Establish regular meetings of the UW Madison Knowledgebase UW System users at the Spring and Fall ITMC meetings.

## Appendices

### Initial Budget

Item Description (person or item)		"Hours and Rate" (if labor) or "Purchase Cost"(if non-labor)	Line Total
1	<i>KnowledgeBase Site Fee - Two Years at \$2,500 per year for three schools</i>	Purchase Cost	\$15,000
2	KnowledgeBase Administrator Training for each of three schools	6 hours at \$70/hour	\$1,260
3	KnowledgeBase Authentication Set up for each of three schools	3 hours at \$100/hour	\$900
4	Project Management for each of three schools	10 hours at \$100/hour	\$3,000
		<b>Total Request:</b>	<b>\$20,160</b>

### Final Budget

Item Description (person or item)		"Hours and Rate" (if labor) or "Purchase Cost"(if non-labor)	Line Total
1	<i>KnowledgeBase Site Fee - Two Years at \$2,500 per year for three schools (UW Extension, UW Colleges, UW Superior)</i>	Purchase Cost	\$15,000
2	KnowledgeBase Administrator Training for each of three schools,	6 hours at \$70/hour	\$1,260
3	KnowledgeBase Authentication Set up for each of three schools	3 hours at \$100/hour	\$900
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