TO: ALA Executive Board

RE: Major Technology Infrastructure Plans

ACTION REQUESTED/INFORMATION/REPORT: Discussion

REQUESTED BY:
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DATE: April 11, 2016

BACKGROUND:
This report provides an update on ALA’s major technology plans for the remainder of FY2016, project plans for FY2017, and plans for FY2018 and beyond.
ALA Information Technology & Telecommunications made significant changes in its strategic roadmap in mid-2015, in response to changes in the IT environment, to member survey responses (early FY2015).

**Plans for the remainder of FY2016**

1. **Continue the Implementation of the New E-Commerce System for Membership Dues and Donations**
   This project will make it easier for members to join, rejoin, renew, and offer new opportunities for fundraising. User acceptance testing will be completed on April 6th. This project is scheduled to launch in late April or early May 2016.

2. **Implement a New eLearning E-Commerce Platform**
   In collaboration with ALA Publishing, ITTS and an (internal) eLearning Task Force are implementing a new E-Commerce website for ALA continuing education to unify ALA’s online learning opportunities in one place in one shopping cart. The first phase of this project is targeted to launch this summer.

3. **Define Requirements for a New eStore E-commerce Platform**
   In collaboration with ALA Publishing, ITTS and an internal Task Force are implementing an E-Commerce website for a new online store. This new system will integrate publishing products and online learning opportunities in one place in one shopping cart. We are currently developing the requirements for the new site. The first phase of this project will launch in FY2017.

4. **Begin Implementation of a mobile-friendly, responsive/redesigned theme for the ALA and Division/Unit Websites**
   ITTS is implementing a responsive theme on the ALA and Division websites, including significant home-page changes, which will better display across different types of mobile devices. 10% of total ALA website traffic is now coming from mobile devices – and that number is expected to grow rapidly. A responsive theme will also enable implementation of mobile apps in the next 1-2 years.

5. **Improvements to Website Search Engine**
   ITTS is working with consultants to install a new Google Search Appliance to improve search results on the ALA website.

6. **Upgrade or replace ALA’s Moodle Courseware Software**
   We are formally investigating the use of ALA Publishing’s Moodle platform for ALA e-courses. The site is an externally-hosted software platform and will increase support for leadership development.
7. **Implement a Disaster Recovery plan using Disaster Recovery as a Service (DRaaS)**
   After investigating options for updating our Disaster Recovery plans, we’ve selected a vendor. We began implementation in FY2016 and will continue into FY2017. This will allow us to back up our virtual servers in the cloud for disaster recovery so that external versions can be turned on when a service fails. This will allow faster restoration of services in case of an emergency.

8. **Migrate staff to Microsoft Office 365 email system**
   Phase one is the migration to Outlook 365 Email and Sympa list Email routing in FY2016. The software and email archives will be hosted by Microsoft, which will make software maintenance and access to Outlook archives much easier. We plan to move staff to the cloud-based Office 365 service to make remote access to Microsoft Word, Excel, and PowerPoint through any web browser in FY2017.

9. **Upgrade ALA’s Financial Systems**
   We will perform necessary upgrades to stay current with software releases/improvements.

**Plans for FY17**

1. **Replace ALA Connect and profile management with a hosted community software service**
   We have selected a vendor, Higher Logic, and implementation is set to begin in April 2016, when we have the new microsites module that reflects the changes Higher Logic is making to the base code to accommodate ALA’s groups. We hope to launch the new system in early FY2017, although this is dependent on additional interface changes the company is making to the admin side of the software that staff will use. We're continuing to work with the stakeholders as they confirm which groups to migrate, and in March we started a discussion about branding. We remind you that there are content types that will not be available in the new platform, although all existing content designated to be migrated will be moved over and available as archived pdf, text, or jpg files. The content types that will not be available in the new system are collaborative Online Docs, text-based Chat, and Polls. Online collaborative tools have been an area of significant market change during the past six years. The changes being made to these platforms facilitate faster implementation of new features, improve the interface, allow more flexibility for units wanting to customize groups, increase membership marketing opportunities, and offer potential new revenue streams.

2. **Begin the Implementation of a New eStore E-commerce Platform**
   In collaboration with ALA Publishing, ITTS and an internal Task Force are implementing an E-Commerce website for the ALA online store. This new system will integrate publishing products and online learning opportunities in one place in one shopping cart. The first phase of this project will launch in FY2017.
3. **Complete the Implementation of phase II of the new E-Commerce system for membership dues and donations**
   This phase will allow us to take online memberships for corporate, continuing, and life members. It will allow for payment using an auto renew feature.

4. **Complete the Implementation of phase II of the New eLearning E-commerce System**
   This phase will provide integration to webinar software like Adobe Connect and WebEx webinar software.

5. **Complete the Implementation of a mobile-friendly, responsive/redesigned theme for the ALA and Division/Unit Websites**
   ITTS will complete the implementation of a responsive theme on the ALA and Division websites, including significant home-page changes, which will better display across different types of mobile devices. 10% of total ALA website traffic is now coming from mobile devices – and that number is expected to grow rapidly. A responsive theme will also enable implementation of mobile apps in the next 1-2 years.

6. **Investigate Learning Management Platforms to Upgrade or Replace ALA’s Moodle Courseware Software and Webinar Tools**
   We will investigate options for replacing ALA’s Moodle platform and webinar tools used for ALA e-courses to increase support for leadership development.

7. **Complete the migration to Microsoft Office 365**
   We plan to move staff to the cloud-based Office 365 service to make remote access to Microsoft Word, Excel, and PowerPoint available through any web browser. The software will be hosted by Microsoft, which will make document storage and software maintenance much easier.

8. **Replace helpdesk software**
   For similar reasons, we’ll be migrating to a cloud-based helpdesk solution. This will allow all staff from any location to submit and track help requests via a web browser. The software will be maintained and upgraded by the provider and will allow ITTS staff to better manage helpdesk tickets from anywhere.

9. **Upgrade ALA’s iMIS Membership System**
   We will perform necessary upgrades to stay current with software releases/improvements.

10. **Upgrade ALA’s Financial Systems**
    We will perform necessary upgrades to stay current with software releases/improvements.

11. **Implement a new telephone system**
We will replace ALA’s 16 year-old telephone system in FY2017. The new Voice-Over-IP system will also increase staff efficiency by providing integrated access to messages (voice/email).

12. **Implement mobile apps for the ala.org site**
   This will allow members and the public to access information and services through a set of mobile applications, including current membership information, express membership renewals, and our most popular web pages.

**Plans for FY18 and beyond**

1. **Move and/or migrate to new software for the ala.org Website and division/unit Websites**
   We will explore options for moving and/or replacing the software used to maintain the ala.org website into the cloud where it will be maintained by an outside provider. This will reduce the amount of staff time spent on upgrades and security patches.

2. **Move staff who require less robust desktops to cloud-based tablets**
   Once we’ve migrated staff to using Office 365 online and web-based iMIS, we’ll determine which, if any, users can be moved from desktops to cloud-based tablets in order to save on software maintenance and hardware costs. This would enable users requiring only cloud-based services to have a notebook computer that can easily be replaced in the event of a hardware malfunction and reduce the time spent on rolling out software applications and maintaining them on ALA desktops and laptops.

3. **Assess our remote application platform**
   We will investigate possible solutions to replace Citrix for remote access to remaining in-house applications.

4. **Investigate external hosting solutions for our Financial Applications**
   Moving all parts of the financial system to an external host will allow all staff to access it remotely, outsource maintenance of the hardware infrastructure, and accelerate software upgrades.

5. **Reassess Shibboleth to determine appropriate solution**
   We will investigate alternate solutions that might replace our single sign-on technology for all of our web-based resources.

6. **Implement Improved Executive Data Access**
   This project would improve analysis of our existing membership and financial data. Once executive management has decided which metrics should be measured, we can configure and implement iDashboard to provide an executive dashboard, reporting tools, sophisticated charts and grids, pivot tables, decomposition trends, perspective views, performance maps, and key performance indicator measures.
7. **Reassess our iMIS Membership System Procedures, Processes, and Data Structures**

We will explore modifying our processes, procedures, and data structures in our iMIS Association Management System (AMS) used for managing member and customer information.