TO: ALA Executive Board

RE: External IT Review

ACTION REQUESTED/INFORMATION/REPORT:
Discussion

ACTION REQUESTED BY:
Sherri Vanyek, Information Technology & Telecommunication Service (ITTS), Director
Ron Block, Chair, Website Advisory Committee

CONTACT PERSON:
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DATE: June 16, 2016

BACKGROUND:
In late fall 2015, ALA Management contracted with two individuals to work together on an
external review of ALA’s ITTS systems: Brian Schottlaender, University Librarian, University of
California-San Diego, and Margo Pecoulas, Director of IT, American Academy of Periodontology.
Together, they brought both knowledge of the association IT environment, including specific
product knowledge, and deep knowledge of ALA – its structure, values and culture.

At the same time, ITTS Director Sherri Vanyek and ALCTS Executive Director Keri Cascio led an
internal review involving meetings with staff. The results of this process, along with internal IT
reports, the ITTS budget and budget trend data were provided to Pecoulas and Schottlaender
for their review prior to onsite meetings.

Onsite interviews with staff were set for January 28-29, 2016. Working with Sherri Vanyek, the
consultants developed an intensive two-day schedule of individual and group staff meetings. In
advance of these face-to-face meetings, the consultants provided a pre-interview
questionnaire, which participating staff were asked to complete and send in advance, enabling
the consultants to move quickly to the issues of most concern to various stakeholders. Careful
notes were taken during the meetings, for later review.

Following this paragraph is a status report on the recommendations from the
consultants’ External IT Review Report (includes an addendum) discussed at the spring ALA
Executive Board meeting. ITTS continues to work on high priority projects outlined in the ALA
Strategic Technology Directions Update: 2016-2017 report and items outlined in the IT External
Review. ITTS has provided a current status report as of June 16th on our major projects.
ATTACHMENTS:

Status of IT External Review Recommendations

1. Do not pursue replacing iMIS in the immediate future. Instead:
   a. keep it updated (routinely);
      ITTS is budgeted and scheduled to upgrade iMIS to its current release in FY2017.
   b. devote resources to de-duplicating the records in it;
      ITTS will work with Member and Customer Service on this effort in FY2017.
   c. devote resources to improving the quality of the data in the remaining, de-duplicated records; and
      ITTS will work with Member and Customer Service on this effort in FY2017.
   d. devote resources to improving its report-generation capabilities.
      ITTS will add a Data/Business Analyst in FY2017 to improve utilization needed for appropriate member engagement.

2. Maintain the plan and timetable for implementing a new, Association-wide e-Commerce platform.
   An ecommerce system for Dues and Donations is scheduled to launch in July 2016. The new eLearning ecommerce system is scheduled to launch in early 2017. The eStore ecommerce system is scheduled to launch in calendar year 2107.

3. Recruit Content Management System Administrator.
   ITTS will look at the feasibility of adding this position in FY2018.

4. Temporarily: migrate e-Learning content from the Association’s Moodle instance to ALA Publishing’s instance.
   ITTS and Publishing met with a consultant to migrate ALA’s Moodle courseware platform to Publishing’s Moodle in late May 2016. We are waiting on a quote for migration from the consultant.
   Longer term: select and implement an Association-wide e-Learning platform.

5. Pursue a phased transition to Office 365.
   ITTS is working on the implementation of Office 365. The project will be divided into two phases. The email migration and outbound routing of Sympa list server email will be the first phase and the installation of Microsoft Office products (Word, Excel, and PowerPoint) will be installed in the second phase. The first phase is scheduled to rollout this summer.

6. Conduct a business process review of the payment approval process in order to identify bottlenecks and to evaluate whether adjustments can be made to the software and/or approval process itself.
   The ALA Finance and Accounting department will conduct a business process review of the payment approval process in FY2017.

7. Commit, explicitly, to building/implementing web assets that are responsive.
   All ITTS web-based projects that are currently underway and planned will be responsive.

8. Implement new responsive design template for ALA.org
ITTS is working on the implementation of a responsive redesign for the main ALA website. The new development server required has been created and our vendor has successfully shifted the database onto it and begun planning and/or making updates to things like the version of PHP and code-repository software used. Once we have a prototype of the ALA.org homepage with the new theme to share, ITTS will be scheduling sessions with division and other stakeholders to share a proposed timeline and discuss the resources required to apply the redesign to each microsite. The current timeline for ALA.org calls for the homepage redesign and theme changes to occur early in fiscal 2017, with rolling changes to all other microsites happening thereafter, as fast as ITTS and the responsible units can prepare them.

9. Convene a working group of ITTS and divisional staff to review and draft guidelines/activities for moving divisional sites to responsive template. Once we have a prototype of the ALA.org homepage with the new theme to share, ITTS will be scheduling sessions with division and other stakeholders to share a proposed timeline and discuss the resources required to apply the redesign to each microsite. The current timeline for ALA.org calls for the homepage redesign and theme changes to occur early in fiscal 2017, with rolling changes to all other microsites happening thereafter, as fast as ITTS and their units can prepare them.

10. Implement ALA Connect on the Higher Logic community platform.

   The Higher Logic implementation is underway. The first iMIS profile data migration has taken place. The project is scheduled to launch in FY2017.

11. Continue to fund community manager staff position and budget for Higher Logic annual educational forum.

   The position is funded and we belong to the annual educational forum.

12. Develop a training program for staff committee liaisons to champion and promote use of the platform for collaboration.

   The plan for this will take place in FY2017, once we are closer to the launch of the new ALA Connect community platform.

13. Utilize ITTS Advisory Committee (see below) to explore the feasibility of adopting Volunteer Central.

   An internal ITTS Advisory Committee will be appointed at the beginning of FY2017.

14. Explore the possibility of using HL microsites as the primary application for building grant sites.

   The plan for this will take place in FY2018, once we have launch of the new ALA Connect community platform with Higher Logic.

15. Replace the telephone system, whether with a VOIP-based system or with some other technology that is fit for contemporary purpose.

   ITTS is scheduled to replace the 16 year-old telephone system in FY2017.

16. Utilize the ITTS Advisory Committee (see below) to review and define to which staff and under what circumstances remote access to business systems can be extended.

   An internal ITTS advisory Committee will be appointed at the beginning of FY2017.
17. Utilize the ITTS Advisory Committee (see below) to review and rationalize the various email marketing platforms currently in use within the Association.
   An internal ITTS advisory Committee will be appointed at the beginning of FY2017.
18. Create an internal ITTS Advisory Committee to facilitate decision-making and communication.
   An internal ITTS advisory Committee will be appointed at the beginning of FY2017.
19. Regularize—and increase the frequency of—implementation updates.
   ITTS will develop a new plan for regular update communications for FY2017.
20. Create and implement a system of Help Desk support tiers that is quantitative and time-based, not narrative.
   ITTS will implement a new Help Desk support system in FY2017.
21. Institute mandatory ticketing.
   ITTS will implement this after the new Help Desk system is installed and launched.
22. Recruit:
   a. A Project Manager.
      ITTS and Publishing will add an eStore Project Manager for an Association-wide eStore. The position will be funded through Publishing (50%) and ITTS (50%) and will report jointly.
   b. A Web Developer.
      ITTS will look at the feasibility of adding this position in FY2018
23. Allocate additional funding to development.
   ITTS will look at additional funding for development in FY2018.
24. Consider relocating some training from ITTS to HR.
   ITTS and HR will look at relocating some training to HR FY2018.

ADDENDUM: CUSTOMIZATION VS. STANDARDIZATION

Recommendations:
1. Mandate standardized implementation of technology platforms and applications, to the maximum extent possible.
   ITTS will work with the new (beginning FY2017) ITTS Advisory Committee and with ALA Management to increase standardization, to both improve the overall user experience and to increase efficient use of resources. Work on the current eCommerce modules (Dues/Donations, eLearning, eStore) have involved collaborative processes and will provide a strong base for future improvement.
2. Require that any decision(s) to go off baseline are vetted with ITTS so that the full impact of any customization is understood by the unit/division requesting it, by ITTS, and by management.
   ITTS is currently working with ALA Management to bring together into a consolidated Operational Practice, for internal discussion, both ALA policies (e.g. ALA Policy B.3.2 – Library Services for People with Disabilities Policy) and ALA operational rules (e.g. ITTS policies, Finance policies). This practice is intended to provide a consistent framework for future decision-making about IT and IT-related projects by all ALA units. The costs of both customization and unit-level outsourcing will be part of this discussion. ITTS review is included in the draft practice.