TO: ALA Executive Board

RE: Information Technology and Telecommunication Services (ITTS) Internal Review Report
November 2015

ACTION REQUESTED/INFORMATION/REPORT: Discussion

ACTION REQUESTED BY:
Sherri Vanyek, Director, Information Technology and Telecommunication Services (ITTS)
Ron Block, Chair of the Website Advisory Committee

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DRAFT OF MOTION: None

DATE: 12/14/2015

BACKGROUND: In October and November 2015, an internal review was conducted by Sherri
Vanyek (Director, ITTS) and Keri Cascio (Executive Director, ALCTS). The review consisted of
individual and group discussions of the *ALA Strategic Technology Directions Update: 2016-2017*.

ATTACHMENTS:
ITTS Internal Review Report November 2015

ALA Internal IT Review
November 2015

Introduction

In October and November 2015, an internal review was conducted by Sherri Vanyek (Director, ITTS) and Keri Cascio (Executive Director, ALCTS). The review consisted of individual and group discussions of the *ALA Strategic Technology Directions Update: 2016-2017* (the Report).

An underlying mission of ALA is to serve our members well and efficiently. During the review, staff commented that a focus on member support and engagement tools would allow for advancement of the organization. All systems supported by ITTS affect service to members and other staff in some way.

This internal review focuses on the following themes, and the systems supported by ITTS often weave these multiple internal categories:

- Member support and engagement
- Professional and leadership development
- Productivity and communication
- Systems infrastructure

Member support and engagement

Member support and engagement is the core mission of ALA staff. Many tools are in place with ITTS support to allow staff to interact with members. Systems in this area continue to be a high priority for ITTS and take up a large portion of its staff time for implementation and support.

iMIS/AMS

At the core of ALA member services is iMIS, its Association Management System (AMS). This system stores all transactions with members and offers reports to staff to track member engagement. With the recent upgrade to iMIS, ALA can begin migrating staff to the web-based portal for remote access. In 2017, ALA will begin exploring alternative AMS solutions. Each time a migration has been considered in the past, the conclusion has been that iMIS remains to be the best solution for our AMS needs.

iMIS is a powerful tool, and its use can be improved. Some requests from staff are:

- Use Intelligent Query Analyzer (IQA) to produce membership and demographic reports that can be replicated by staff (many reports are currently only run by ITTS staff)
- Use IQA to produce fundraising reports (e.g. get "gave last year not given yet this year" data, where a donor stands, find an easy way to locate donors)
- Eliminate need for staff to maintain separate Access databases with duplicative data entry on member transactions for reporting purposes
- Clean up older and duplicate records and web-only non-member records

- Capture leads of non-member transactions for marketing purposes

New ALA Connect

The current ALA Connect platform will be replaced with Higher Logic, a leader in community engagement software for associations. To ensure a successful implementation, a Community Engagement Specialist has been hired in ITTS.

The new ALA Connect will offer more options to create customized member profiles. This should lead to better demographic data for staff to use when interacting with members.

There is still a concern that members will continue to use Google Apps to communication with each other and perform their work, and that this will not be stored in ALA Connect for future access. Staff will have to continue to educate members on the tools available within ALA Connect.

Member profiles

Members have consistently requested profile information that shows their activity with ALA, both for volunteerism and for continuing education. With the implementation of Higher Logic, there will be a "My CE" option in member profiles to show courses taken and programs attended. There will also be historical CVs that will show all participation in ALA. Proper integration between iMIS and Higher Logic is key to implementing these tools.

Email discussion lists

A move to Higher Logic could also eliminate the reliance on Sympa email discussion list software. It should be easier to send emails to a committee, and many committee email discussion lists could be eliminated. The email discussion lists take up a tremendous amount of staff time to maintain, as they have to manually add and delete email addresses when there are changes to committee membership. More investigation is needed for the possible migration of lists that consist of ALA members and non-members. There are also concerns about access to committee list archives if they are switched to a new platform without data migration.

New Ecommerce System

A new ecommerce system to replace membership join, renewals, and donations was selected and is on track for a January 2016 rollout. There were multiple requests for improvements to the membership process that could be implemented in the future, including:
- Automate group student memberships with an automated application to upload in iMIS (i.e. 300 students at San Diego State University)
- Add joint chapter student membership application with email invoicing, this is currently a manual process handled by MACS
- Add membership card and invoice print options to My ALA page
- Add a My Chapter feature to My ALA page
- Add the ability to auto-renew membership dues
- Add the ability to set up monthly reoccurring donations and pledges

Some of these requests depend on financial standards and best practices, and more investigation is needed. The ecommerce system for dues and donations will be expanded to include learning events (webinars, web courses, institutes, etc.) in spring of 2016.

In addition to the ecommerce platform upgrades in the ITTS schedule, units have requested implementation of Square or a similar technology for accepting payments off site at conferences and other events. Currently, staff must take an imprint of a credit card and enter the transaction when back in the office. This will also require further investigation with financial tools.

Member Resources

Section 8 of the Report (p. 14-16) lists the systems that have been created with disparate code, interfaces, and servers to support member transactions not captured in iMIS or ALA Connect. There is a possibility to streamline or combine some of these systems, but there is not currently staff time or funding to work on these projects. These resources are all used to different extents, but they all impact service to members. Two systems were highlighted during the internal review: the volunteer system and the awards and grants database.

Volunteer System

A new volunteer application and appointment system is being developed to streamline access by members, appointing officers, and staff. The system should launch in December 2015, and will port all data from the current system prior to launch. It is possible that the Volunteer Manager module of Higher Logic can take over part or all of the volunteer system functions. This will be investigated for a later phase of the Higher Logic implementation.

Awards & Grants

The web interface for the awards and grants database is cumbersome to use for members and for staff. Currently, awards are not stored on the recipient's record in iMIS and therefore cannot be displayed in the proposed historical CV. Staff needs to manually update award winners each year in the database. Many units also maintain their own webpages for award winners, resulting in duplicate work. When there are changes to an award (like sponsorships), there are many steps to complete the task of updating the database which requires assistance by ALA Library staff and ITTS staff.

The award nomination/submission process is not consistent across ALA units. Some use an online application system; others rely on a simple email nominations process. There is a potential to use the conference CadmiumCD or the Public Programs Office software to track award submissions, but this would need to be investigated further.

Website

Plans are in place to implement a new website theme with responsive design. This is expected to occur in February and March 2016, with a staggered rollout for division and unit pages after the main ALA site is completed. The design has been vetted by member focus groups, staff, and the ALA Board.

Accessibility

The ALA Policy Manual requires that ALA publications, correspondence, and websites must conform to the currently accepted guidelines for accessibility. Since this policy was passed in 2001, ALA has tried to conform to accessibility guidelines for other communication channels, such as webinars and community engagement software. Accessibility requirements often affect the selection and implementation of new systems, and eliminate the option of some off the shelf products.

Professional and Leadership Development

Professional and Leadership Development is one of the Key Action Areas in the Strategic Directions adopted by ALA Council in 2015. ALA and its divisions offer high-quality continuing education opportunities to members and non-members alike. ITTS supports this program by supplying enterprise software for webinars and web courses.

Moodle

Moodle needs to be upgraded to the most recent version or be replaced. There are features which are no longer supported which are essential to currently running web courses. Users and instructors would prefer a learning environment that is easier to use. An upgrade is scheduled for the end of FY2016, and it has been requested that staff and instructors have an advanced warning of one to three month notice before moving to a new system.

Web conferencing software

Every week, there's at least one webinar offered by a unit within ALA. This low-cost continuing education option continues to be popular with attendees. ALA ITTS supports an enterprise installation of Adobe Connect, which allows 100 seats at a time for a single session.

Due to the seat restrictions, some units have purchased their own version of Adobe Connect or other web conferencing software like GoToWebinar. This creates additional issues with internal support by ITTS, and units must support their own software installations. It is also difficult to assure that the web conferencing platforms are accessible to assistive technology tools. The assistive technology tools of end users also affect the accessibility of the system.

The eLearning Specialist in ITTS is committed to supporting and training ALA staff on Adobe Connect to ensure a consistent experience for course participants. There is also a group of power users who communicate with each other on best practices. This consistency is lost when multiple products are in use by ALA units.

It would be preferred if ALA could standardize the web conferencing platform across the association with a licensing model that works for all units. The contract with Adobe Connect is in place through August 2016.

Continuing Education Credits

ALA is accredited by the International Association for Continuing Education and Training (IACET) to offer Continuing Education Credits (CEUs), and these are managed by the Office of Human Resource Development and Recruitment (HRDR). The certifying body has a requirement to use a module in iMIS that will track CEUs awarded and make reporting more efficient. Without these reports (which need to be developed by ITTS staff), it will be more difficult for HRDR to be recertified. ITTS has developed the necessary reports after further conversations stemming from this review. This module will also assist with the historical CV project.

Productivity and communication

The Association should make a commitment to increasing staff productivity and channels for communication. Units are pressed thin, and the implementation of productivity or automation tools will allow them to work more efficiently with the staff they have.

Remote Resources

ALA staff travels often for work, and can be away at conferences or other events at any time. ALA also offers staff the option to work from home with a telecommuting policy after approval by their managers. Telecommuting is defined as a remote-access arrangement for at least part of the workweek on a regular basis.

As part of the policy, ALA has established security controls and conditions for use of ALA equipment while telecommuting. All ALA records, files, and documents must be protected from authorized disclosure or damage and returned safely to the official work location immediately upon request. In addition, any computers used for the editing or sending of ALA documents must have up-to-date virus protection active. ITTS is responsible for monitoring (and retrieving as required) Association equipment assigned off-site.

Currently, staff can access certain systems remotely through Citrix. There are a limited number of licenses available for Citrix, and many staff members are not given the option for Citrix access. The Citrix server farm will be upgraded in FY2016. Remote access to internal shared drives is offered to all staff through NetStorage, which is difficult to use.

The planned migration to Office 365 in FY2016 will assist with staff productivity. Staff will be able to access their archived email folders when out of the office (this is not currently an option with Outlook Web Access). They would also be able to access files remotely, and could share online files with members and staff. The Washington Office is also planning a migration to Office 365.

Office 365 could eliminate a reliance on Google Apps when working with members on online documents, which has been problematic. Due to ala.org being claimed on Google for spam filtering purposes, staff must contact ITTS to use their ala.org email address to access Google Drive and other apps.

To keep staff productivity at a high level, ALA must make a commitment to improve remote access to all applications, including Prophix, Microsoft GP Dynamics, SharePoint bill payments processing , time allocation entry, and iMIS. Yet moving to the cloud requires resources for research and vendor selection, and budget dollars for migration of data. Required monthly support costs must be built into the operating budget, since these system expenses can no longer be depreciated over time.

In FY2016, ALA is focused on moving the following services to the cloud: Disaster Recovery as a Service, Outlook 365, and a new ALA Connect platform. As ALA migrates systems onto cloud service platforms, the ITTS support structure will be modified over time.

Email Marketing

ALA has purchased an enterprise solution for the Informz email marketing application. Informz integrates with iMIS and allows for queries to be created for automated emails. Using Informz across the organization can unify member communication preferences, messaging consistency, automated email lists, calendaring for messages, and training.

As with web conferencing software, some units have chosen to use different email marketing software, such as Mail Chimp. These solutions do not integrate with iMIS or allow for an ALA-wide calendar. ALA would like to reduce over communication in general, and compare when mailings are scheduled to go out. Member preferences and updates need to be written back to iMIS to keep opt-out preferences up to date.

The eLearning Specialist in ITTS is committed to supporting and training ALA staff on Informz to ensure a consistent experience with marketing emails for ALA members. This person cannot support all email packages being used by ALA units. There is also a group of power users who communicate with each other on best practices for marketing email communications. The consistency for training and best practices is lost when multiple products are being implemented.

Communication tools

Internal communication tools are needed to track work requests for various units. TrackIT is currently in place for ITTS, but there have been requests from Finance and Facilities to install a work order system for their units to improve service delivery. ITTS will investigate if TrackIT usage could be expanded, or if another system can be implemented for these units.

Installation of a Voiceover IP (VoIP) telephone system is scheduled for early 2017. This will improve communication by allowing for integration of voice calling, voice messaging, text, email, and conferencing capabilities on to a single platform. It will also assist staff with remote access and telecommuting.

Internal systems

There are a number of systems that are not transparent to ALA members which are essential to the operations of the Association. A few of these were considered during the internal review.

Disaster Recovery

The Disaster Recovery as a Service (DRaaS) project is underway and will be completed this spring. This project is not visible to members, but it is an overall high priority. ALA is committed to following best practices for disaster recovery and security.

Finance

The integration between Microsoft GP Dynamics (general ledger) and Prophix (fund budgeting and reports) is very important. Sometimes this integration breaks with upgrades and requires manual intervention for export and import of data. This process will be evaluated for improvements.

ALA staff relies on Prophix to analyze their budgets and funds each month, and produce monthly and yearly reports for their units. Some staff are still using separate Microsoft Access databases to track and analyze restricted funds. This process will be evaluated for improvements.

Finance also has an obligation to report specific financial and operational information to outside agencies such as the Better Business Bureau (BBB). Data about the Association is stored in many different ways across its web presence, and a better way to track and report certain statistics needs to be evaluated.

Human Resources

The current time and attendance system, eTime, needs to be replaced to allow for remote access. The performance appraisal system also needs to be automated. The current manual system requires six approvals levels and the new HR Ultipro system can only handle four levels. There are options currently under consideration, and additional concerns with some of the replacement options.

Privacy

The Office for Intellectual Freedom (OIF) has recommended that all website communication be encrypted within the next five years. There are complications to many of the current web platforms, but pilots are in place to migrate selected microsites to encrypted server platforms.

Facilities

The security system S2 NetBox used by Facilities can only be accessed on site at this time. Allowing for remote access to this system will improve off-hours facility security monitoring by facility personnel, since part of the building is shared with the residential high rise.

Conclusions

Organizational structure

ALA is a complex organization. It's governed by an elected Council and an Executive Board, and has 37 standing committees at the Association or Council level and 2100 committees supported by ALA units. The ALA is also home to 11 membership divisions and 20 round tables. Divisions and round tables have their own additional governance structure of executive boards, sections, and committees.

As mentioned in the Report, whenever ITTS implements new software they must customize it to replicate ALA's pricing rules, nested organizational structure, and unit-based permissions. The internal structure of ALA creates complications to most implementations, and requires an extensive internal discovery process for new systems.

The Association needs to reduce internal complexities wherever possible as outlined in the Report (p. 33). ALA must encourage simplification at all levels if it wants to save money on IT implementations and create better system integrations.

Staffing and capacity

ITTS supports all units of the Association. As outlined in the Report, ITTS is called upon regularly to provide one-on-one assistance for staff working to master new responsibilities or to trouble-shoot existing systems that relate directly to member needs and interactions.

To increase the capacity of ITTS, ALA should consider hiring the four additional full-time staff positions as outlined in the Report (p. 32-33): Project Manager, Server Administrator, Content Management System Administrator, and Senior Web Developer.

Budget

The ITTS operating budget is currently at 5% of the total ALA budget, but is much higher if you exclude the divisions, publishing, and conference services. Yet all of these units rely on ITTS staff and technologies every day. The industry recommendation is 10-17% for an association according to the American Society of Association Executives (ASAE). There are concerns from staff about the commitment to long-term investment in IT systems and staffing, and IT sustainability for the future.

Communication

It became clear during the internal review that some of the issues that were perceived to be ITTS technology issues are actually communication or workflow issues. The process of the internal review opened up new doors to communication between units and ITTS, and these communication channels need to be cultivated.

ITTS has made great strides in communicating their plans, such as with the Report. As they move forward on projects, they should continue to communicate timelines and goals, and set clear expectations of results for members and staff.