

**TO:** ALA Executive Board

**RE:** ALA Information Technology and Telecommunication Services (ITTS) Current Project Summary and Strategy for Implementation of Operating and Capital Investments for FY19-FY21

**ACTION REQUESTED/INFORMATION/REPORT:**  
REPORT

**ACTION REQUESTED BY:**  
None

**CONTACT PERSON:**

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**DRAFT OF MOTION:**  
None

**DATE:** April 4, 2018

**BACKGROUND:**

**ALA STRATEGIC TECHNOLOGY RATIONALE**

User experience is a key factor for ensuring success in recruiting and retaining members and customers and for helping members and stakeholders develop the skills, networking capacity, and vision they need to strengthen libraries and the communities they serve. The proposed technology investments for FY2019 and beyond position us to support the member and customer experience in the following ways:

**Outcomes**

- Promotes ALA's objectives by making it easy for the public to learn about our mission, access information about libraries and advocacy, join ALA, and purchase goods and services.
- Provides the resources to focus the ala.org website on the public and the profession while moving member information, engagement, and resources to a different and more interactive site.
- Creates both an internal and an external site to give us the ability to create strong calls to action focused on the different audiences.
- Uses technology to aggregate and display a personalized "My ALA" view of the most relevant content, recommendations, learning opportunities, networking options, pathways to leadership, and interest-based advocacy for each user.
- Creates a central resource for the profession that coordinates advocacy campaigns, outreach to funders and policymakers, and concrete actions on ALA policy initiatives.

## Current IT Project Summary

- Tracks relationship networks leading to greater support for our work through donations, sponsorships, and partnerships.
- Engages members and stakeholders at all levels to help shape Association directions through meaningful virtual discussions and a suite of online tools for true collaboration to move ideas and projects forward.
- Refocuses ALA work on getting things done rather than working around technology barriers.
- Provides focused learning activities and communities for engaging beyond face-to-face meetings, thereby increasing professional development opportunities and the member value proposition.
- Streamlines systems and processes for donations, registrations, and the purchase of goods and services, making it easier for people to spend money and donate.
- Ensures ALA is able to maintain strict privacy protections for user data, maintain the highest level of security to protect systems, and recover quickly from any physical or virtual technology disasters to restore service with minimal downtime.

### Impact on Staff

- Provides access to real-time member information demographics and data to facilitate data-driven decisions, personalized marketing, and focused services.
- Provides data mining and business intelligence systems to enable predictive analytics that will assist with strategic planning.
- Improves technology resources to make ALA staff more efficient, allows for remote access to critical tools, reduces workflow inefficiencies, moves ALA to paperless processes, ends the need for manual re-entry of data, and integrates disparate systems and data.

At Midwinter, the Board requested both summary and detailed project plans for each of 25+ major projects. As the basis for that work which would be completed by a new project manager, the following summary report organizes the various projects into related clusters, to make it easier to see the purposes and trajectory of the projects. This report provides a brief current project summary overview of the current state, project objectives and articulated next steps for ALA's core systems, single-purpose systems, staff productivity software, and IT infrastructure. The second confidential document (CBD#16) is strategy for implementation for capital and operating investments for fiscal 2019-2021, with a projected timeline. Together, these two documents, combined with the detailed project information held by ITTS, provide the foundation on which the new (FY2019) project manager can build out the necessary tracking and coordination structure.

These documents have been reviewed and endorsed by the ALA Information Technology Advisory Committee (Ron Block, Chair, Tabatha Farney, ACRL, Patrick Gall, ALSC, Stephane Irvin, ASCLA, Theresa Jehlik, PLA, Nancy Jo Lambert. Intern, Elizabeth McKinstry, Intern, Anna Neator, ALCTS, Vandy Pacetti-Donelson, AASL, Jennifer Peter, Member-at-Large, Kelly Sattler, LITA, and Sherri Vanyek, Staff Liaison). These documents have also been reviewed and endorsed by the ALA IT Staff Advisory Group (Keri Cascio, Executive Director ALCTS, Mary Davis Fournier, Deputy Director PPO, Dan Hoppe, AED Human Resources, Ron Jankowski, Director Member Development, James LaRue, Director Intellectual Freedom, Mark Leon, Chief Financial Officer, Alea Navarro, Conference Services, Mary Mackay, AED Publishing, Tim Smith, Deputy Director ITTS, Sherri Vanyek, Director ITTS, Kerry Ward, Executive Director LLAMA), and Jenny Levine (Executive Director LITA).

### ATTACHMENTS:

CORE SYSTEMS			
SYSTEM	CURRENT STATE (FY18)	PROJECT OBJECTIVES	NEXT STEPS
<i>iMIS Association Management System</i>	Stores member (and customer) records, including transaction records (renewals, donations, committee appointments, conference attendance, etc.). Includes 758,357 user records, 9,419,834 activities and is linked to other ALA systems. Heavily customized for ALA member types and structure. Upgrade to version 2017 in FY18 will address many current concerns. Internally maintained. Key system integrations: ALA Connect, ALA eCommerce, conference registration systems, Shibboleth for authentication to ALA web-based resources.	<ul style="list-style-type: none"> <li>De-dupe 150,000+ user records to clean up the database.</li> <li>Standardize fields such as organization name, type of library, etc.</li> <li>Rollout of a web-based staff portal.</li> <li>Enhance use of fund raising capabilities.</li> <li>Enhanced PCI compliance.</li> <li>Stay on current release path; which puts us in a position to access the current functionality.</li> </ul>	<p>Complete project to de-dupe user records.</p> <p>Proceed with iMIS upgrade in FY2018.</p>
<i>Great Plains Financial Management System</i>	Includes General Ledger, Accounts Payable & Fixed Asset, with 22 Fund selections & 799 Unit/Project combinations, 80 separate budgets, grants reporting. Key system integrations: iMIS, Prophix, SharePoint. Upgrading to version 2018 in FY18. Heavily customized for ALA.	<ul style="list-style-type: none"> <li>Get on a current release path—our version GP 2010 becomes unsupported in October of 2020</li> <li>Take advantage of new features in GP 2018.</li> </ul>	<p>Proceed with GP 2018 upgrade in FY2018.</p> <p>Investigate hosted solutions.</p>
<i>ALA Connect (Higher Logic)</i>	Professional collaboration & community site, focused on active member engagement. Higher Logic platform replacing custom-developed platform (Drupal). System support in FY18. Customized to support ALA structure & enhanced accessibility. Will support direct member-to-member communication. Supports robust individual member profile (self)management, e.g. CVs, "My CE," volunteer process, member matching, including for connecting mentor pairs. Uses Shibboleth for authentication.	<p>ALA is upgrading to a new platform powered by Higher Logic. It offers an intuitive, mobile-friendly interface and will give members new features, including:</p> <ul style="list-style-type: none"> <li>A personalized content dashboard;</li> <li>Automated recognition on your member profile;</li> <li>Easy networking options;</li> <li>Granular privacy profile options; and</li> <li>Access to a robust member directory.</li> <li>Implement the volunteer module to replace the 10-year old appointments database.</li> </ul>	<p>Proceed with the implementation and migration to the new ALA Connect in April 2018.</p> <p>Implement the volunteer, mentor, and Workspace modules.</p>

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<i>ALA eCommerce (Drupal eCommerce)</i>	iMIS-linked modules supporting web-based transactions: ALA Store, ALA Dues & Donations; ALA eLearning. ALA Dues/Donations Phase I implemented early FY17; ALA Store Phase I implemented early FY18 with integration to third-party fulfillment vendor; ALA eLearning will implement in late FY18. Uses Shibboleth for authentication.	<ul style="list-style-type: none"> <li>• Increase our security posture by retiring aging platforms.</li> <li>• Enrich findability with enhanced search and enhanced accessibility to enhance member experience.</li> <li>• Use data-driven marketing techniques to improve revenue streams.</li> </ul>	Proceed with Phase II of Dues and Donations, Implement Phase II of the eStore, and launch Phase I of eLearning.
<i>Conference Registration Systems (Experient; CompuSystems and eShow)</i>	Externally-hosted systems supporting major conference registration (ALA, AASL, ACRL, PLA). Link to externally-hosted hotel registration systems (Experient, OnPeak). Integrated with iMIS using web services; Heavily customized for ALA. Fixed term contracts. Use Shibboleth for authentication.	<ul style="list-style-type: none"> <li>• Process registrations for major conferences;</li> <li>• Consolidate to a single platform to enhance the utilization of ITTS resources and focus ALA's accessibility efforts.</li> </ul>	Assess vendor platforms and consolidation options upon contract renewal.
<i>ala.org Website (Drupal-based)</i>	Responsive design implemented FY18. Reviewing feedback to determine next phase options. Uses Shibboleth for authentication.	<ul style="list-style-type: none"> <li>• Accelerate movement toward mobile platforms.</li> <li>• Shift most "inside ALA" activity from ala.org to the new ALA Connect</li> <li>• A simpler, friendlier, more externally focused ala.org that is organized by major focus areas of the Association, not by its structural components.</li> </ul>	<ul style="list-style-type: none"> <li>• Migrate "inside ALA" activity from ala.org to ALA Connect.</li> <li>• Investigate replacement of designer of Awards and Grants application. We are currently rebuilding the Awards and Grants application to use the new responsive design, but we need to look at more robust alternatives soon.</li> </ul>
<i>Informz (Higher Logic)</i>	Used for non-mailing list email communication and marketing from ALA and its units; externally hosted. Integrated with iMIS to help automate messages and respect user communication preferences.	<ul style="list-style-type: none"> <li>• Coordinate and consolidate communications to reduce quantity while increasing quality.</li> </ul>	Assess vendor platforms and consolidation options upon contract renewals.

## SINGLE PURPOSE SYSTEMS

SYSTEM	CURRENT STATE (FY18)	OBJECTIVES	NEXT STEPS
<i>Moodle</i>	Open-source. Externally hosted. Supports ALA courses.	<ul style="list-style-type: none"> <li>• Delivery of eLearning.</li> <li>• Accessible platform.</li> <li>• Integrate with iMIS to automatically generate rosters in the LMS and access to each course.</li> <li>• Integration with Shibboleth so that members and staff can use their existing ALA logins.</li> </ul>	Investigate and acquire a learning management system that integrates with iMIS, ALA Connect, and Shibboleth.
<i>Webinar Delivery Platforms (Adobe Connect, WebEx, GotoWebinar, GotoMeeting; and Zoom)</i>	Used for online content delivery and group meetings. Externally hosted.	<ul style="list-style-type: none"> <li>• Content delivery and meetings.</li> <li>• Accessible platform.</li> <li>• Reduce the amount of money we pay in licensing fees to multiple systems.</li> <li>• Standardize the member experience across the association.</li> </ul>	Assess vendor platforms and consolidation options upon contract renewals.
<i>ala.org Blogs &amp; Wikis</i>	Collaborative content development and delivery.	<ul style="list-style-type: none"> <li>• Content development and delivery.</li> <li>• Implement https and Shibboleth on ALA's blogs and wikis to enhance security and improve member access.</li> </ul>	Maintain current upgrade path. Implement https on blogs and wikis. Implement Shibboleth on blogs and wikis.
<i>CRM (Salesforce)</i>	Supports tracking of interactions with member advocates and elected officials for advocacy, potential donors for development, and future partners to support our programs. Externally hosted.	<ul style="list-style-type: none"> <li>• Assembly of a population of advocates, both key players and broader grassroots.</li> <li>• Improved prospective and current donor, sponsor, and partner tracking for all ALA units.</li> </ul>	License and implement a CRM. Provide access to all units that need the information.
<i>Cadmium</i>	Conference program submission and evaluation application. Provides scheduler and recordings for ALA Midwinter and Annual conferences. Highly customized and externally hosted.	<ul style="list-style-type: none"> <li>• Program planning.</li> <li>• Potential increased revenue from selling conference recordings.</li> </ul>	Maintain current upgrade path.
<i>Vision</i>	Printing and mailing of dues renewal notices; externally hosted.	<ul style="list-style-type: none"> <li>• Member retention.</li> </ul>	Maintain current upgrade path.

STAFF PRODUCTIVITY SOFTWARE (ALA-WIDE)			
SYSTEM	CURRENT STATE (FY18)	OBJECTIVES	NEXT STEPS
<i>Microsoft Office 365, Workstation and Cloud Versions</i>	Office 2016 implemented late FY17; Single most widely used suite of applications; includes the Outlook email client, Office Online (Word and Excel), and OneDrive in the cloud.	<ul style="list-style-type: none"> <li>Provides office productivity software.</li> <li>Maintain current functionality for users</li> </ul>	Continue upgrades when they become available. We may be facing a large cost increase which would require an environmental scan to determine an appropriate direction.
<i>Gravitate Nucleus</i>	Data dashboard system implementation planned in FY19; will significantly facilitate use of iMIS / related data; improve our ability to analyze membership statistics, and provide data visualizations.	<ul style="list-style-type: none"> <li>Better decision making based on real-time data</li> </ul>	Rollout dashboards in FY19
<i>Prophix</i>	Used for financial reporting and budgeting. Current shipping release 12 update 6. Current deployed release is 11.	<ul style="list-style-type: none"> <li>Supports accurate financial reporting and budgeting.</li> </ul>	Upgrade to current release
<i>SharePoint</i>	Used for processing invoices and approvals.	<ul style="list-style-type: none"> <li>Reduce reliance on custom software.</li> <li>Support a mobile workforce.</li> </ul>	<ul style="list-style-type: none"> <li>Explore options for bill payment process in Microsoft Dynamics GP (Great Plains) 2018 for elimination of custom application.</li> <li>Explore options for offsite access.</li> </ul>
<i>Desktop Applications</i>	422 different applications in use.	<ul style="list-style-type: none"> <li>Simplify maintenance and support</li> </ul>	Identify redundant (overlapping) software applications.
<i>Mobile Workforce</i>	Deployment of a remote administration solution to a subset of staff. Deployment of Office 365 online to a subset of staff. Full deployment of remote file access and targeted deployment of remote applications.	<ul style="list-style-type: none"> <li>Allow all staff to work remotely with full access to all services and software</li> </ul>	Evaluate devices and technologies to enable a mobile workforce

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<i>Voice Communication System</i>	Existing voice system meets current requirements while lacking support for emerging modes of communication.	<ul style="list-style-type: none"> <li>Unified communication: integration of voice communications with desktop and mobile applications.</li> </ul>	Evaluate opportunities against costs
<i>Laptop &amp; Monitor Upgrades</i>	Workstation equipment that is at end of life.	<ul style="list-style-type: none"> <li>Enable staff to fulfill mission</li> <li>Enhance staff experience by offering additional mobility options.</li> </ul>	Rollout workstation upgrades

## IT INFRASTRUCTURE

SYSTEM	CURRENT STATE (FY18)	OBJECTIVES	NEXT STEPS
<i>Network Infrastructure</i>	Stable network to support the association's activities—the current office wireless access is degraded. Restore full PCI compliant wireless network. Evaluate regulatory compliance—either requirements or mandates	<ul style="list-style-type: none"> <li>Improve performance and security while maintaining stability.</li> <li>Achieve and maintain regulatory compliance.</li> </ul>	Complete the rollout of the new wireless network following PCI requirements in FY18.
<i>Virtualization Server Platform</i>	Current hardware no longer supports virtualization environment. Must maintain upgrade path.	<ul style="list-style-type: none"> <li>Enable a new virtualized environment for use by members and staff.</li> </ul>	Perform the assessment for the appropriate environment. Rollout upgrade.
<i>File Sharing</i>	Legacy systems include monolithic onsite file shares. Existing remote file access platform has underutilized features.	<ul style="list-style-type: none"> <li>Improve access and accessibility of data.</li> </ul>	Evaluate current and available best of breed solutions for data storage and file sharing that meet ALA accessibility requirements
<i>Single-Sign-On (Shibboleth)</i>	Existing web single-sign-on is stable but times out on users and in some cases doesn't instantly recognize previously authenticated users.	<ul style="list-style-type: none"> <li>Provide a stable and best of breed experience in single-sign-on for ALA members and staff.</li> </ul>	<p>Perform environment scan to determine if other solutions offer broader and more robust integration opportunities.</p> <p>Preserve upgrade path. Explore opportunities for broader federation.</p>