TO: ALA Executive Board

RE: ALA ITTS Discussion Document for Building the Next 5 Year Plan for ALA Technology & Project Update

ACTION REQUESTED/INFORMATION/REPORT:

Report

ACTION REQUESTED BY:

Ron Block, Chair of ALA Website Advisory Committee
Sherri Vanyek, Director Information Technology & Telecommunication Services (ITTS)

CONTACT PERSON:

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DRAFT OF MOTION:

None

DATE: 06/13/2017

BACKGROUND:

ALA ITTS Discussion Document for Building the Next 5 Year Plan for ALA Technology & Project Update.

ATTACHMENTS:
DISCUSSION DOCUMENT FOR BUILDING THE NEXT 5 YEAR PLAN FOR ALA TECHNOLOGY - JUNE 2017

“Going forward, IT must be faster and more agile ... more responsive to the business, and ... work not just to enable but to help shape the organization’s broader strategy.” In every sector, innovative new technologies like artificial intelligence, machine learning, augmented, mixed and virtual reality, the data mining of dark analytics, Internet of Things (IoT), cloud-first flexible architectures, Everything-as-a-Service (XaaS), and blockchain are already rewriting the way business is done. Forward thinking CIOs and CEOs “... are sensing and scanning disruptive forces and putting in place deliberate, disciplined innovation responses.”

Staff want to get more from our technologies, learn to use their full capabilities, and thus maximize the value of our technology investments.

As we consider what this means to ALA, we will always align IT planning with organizational priorities, then seek out technologies that provide robust features and a reasonable rate of ROI (Return On Investment).

OBJECTIVES

Our intention is to:

- Support units’ day to day needs and their special initiatives using solutions that provide the best ROI for ALA.
- Enable technologies to support cross-unit teamwork, cross-channel marketing efforts, and the automation of recurring tasks to facilitate productivity.
- Work with senior management, staff and member-leaders to strategize a sustainable restructuring of ALA’s products, services, processes, and workflows to ensure streamlined, cost effective implementations and reduce customizations.
- Mandate the standardized implementation of technology platforms and applications.
- Develop a standardized tiered resources approach to project implementations and subsequent infrastructure maintenance.
- Manage risk; maintain the security of systems, data, and personal information in an increasingly hostile environment.
- Develop business and action plans for using information to make data-driven decisions.

SHORT-TERM (FISCAL 2017-2018)
Member Engagement Tools

- Implement new responsive design for ALA.org.
  - Shift ala.org’s Google Analytics to the shared ALA Store and Join-Renew-Donate eCommerce account to prepare for the creation of channels, funnels and other data collection methods across these applications and develop an action plan for use of this data.
  - Set up Google Search Appliance across all ala.org microsites.
- Develop plan for fully responsive websites and mobile utility: “*Savvy association apps will feature a lightweight front-end presentation layer that ties complex back-end systems together, offering much greater utility.*”
- Implement ALA Connect on the Higher Logic community platform.
  - Explore the possibility of using Higher Logic microsites as the primary application for building grant sites.
- Launch the ALA Store and eCommerce site for eLearning.
- Complete phase 2 of join-renew-donate eCommerce.
- Improve information architecture (menus and navigation devices) of the ALA Support site to facilitate member-volunteer access and staff productivity.

Enterprise Management Tools

- Upgrade iMIS membership system.
  - De-duplicate iMIS membership database and improve data quality.
  - Implement MIS membership system Task Center and other automation tools.
  - Improve iMIS membership system’s report-generation capabilities.
  - Provide web portal for iMIS membership system.
  - Develop data dashboards in the iMIS membership system.
- Install a new phone system with integrated messaging and voice response.
- Utilize the ITTS Advisory Group to review and define to which staff and under what circumstances remote access to business systems can be extended.
  - Set up remote access to business systems.
- Upgrade the finance system.
  - Assist the ALA Finance and Accounting department with a business process review of the payment approval process.
- Improve worker productivity tool usage.
- Investigate single sign-on technologies to enhance our user experience both internally and externally.
- Annual review of ALA technologies in use, environmental scan and plan adjustment.
Dashboard Informatics

- Begin investigating commercial data dashboards with graphic capabilities—staff want to use our data in real time to learn about our members and to be guided in their decision-making.
- Develop dashboards for revenue by member and Recency, Frequency, and Monetary value (RFM) analysis.
- Set up channels and funnels to track ala.org influence on store visit and purchases.
- Organize A/B tests of email effectiveness for donations and store purchases.

Technical Infrastructure

- Implement necessary infrastructure to support association objectives.
- Investigate new platforms, cloud services, APIs and prospective vendors.
- Improve Service Level Agreements (SLAs) for downtime responsiveness and user experience.

Communications, Training & Staff Development

Staff need periodic and on-demand help, including coaching and monitoring to help us stay on track, deliver our strategies and to enable us to effectively manage during transition periods.

- Train staff and member-volunteer groups in the new ALA Connect.
- Develop a training program for staff committee liaisons to champion and promote the use of ALA Connect for collaboration.
- Improve, orient, and maintain staff technical skills sets.
- Hire new staff with technical skill sets.

Resources

- Utilize existing resources to implement association objectives.

MID TO LONG-TERM (FISCAL 2019-2020)

Member Engagement Tools

- Implementation of new projects defined by changes to organizational needs.
- Phase 2 of ALA Connect: Volunteer Central and Mentoring Modules
- Move where appropriate to the cloud; expand modules provided and add personalization.
- Improve user experience for sales transactions through alternate payment methods and digital wallets.
- Look into creating or purchasing mobile fundraising apps powered by mobile wallets.
- Utilize ITTS Advisory Group to explore the feasibility of adopting Volunteer Central and to review and rationalize the various email marketing platforms currently in use within the Association.
- Research, select and implement an association-wide e-Learning platform.
Enterprise Management Tools

- Implementation of new projects defined by changes to organizational needs.
- Alternating years, iMIS or financial system update.
- Investigate possibility of moving internal software applications to the cloud.
- Implement a new Help Desk support system that allows ticketing across ALA units.
  - Create and implement a system of Help Desk support tiers that is quantitative and time-based.
  - Institute mandatory ticketing once the new Help Desk system is installed and launched.
- Develop a digital asset management (DAM) plan and look into possible applications.
- Annual review of technologies in use, environmental scan and plan adjustment.

Dashboard Informatics

- Develop association-wide business analytics and dashboard(s) for staff and member-leaders.
  “Business analytics must become much more real time, much more actionable.”

Technical Infrastructure

- Implement necessary infrastructure to support association objectives.

Communications, Training & Staff Development

- ITTS and HR will look at relocating staff orientation training to HR FY2019.
- Establish schedule for mandatory recurring courses for staff.
- Offer optional training courses for staff.

Resources

- Web Developer: Look at the feasibility of adding this position.
- Content Management System Administrator: Look at the feasibility of adding this position.
- Improve, orient, and maintain staff technical skills sets.
- Look at additional funding for Development Office in FY2019.

LONG TERM (FISCAL 2021-2022)

Member Engagement Tools

- Implementation of new projects defined by changes to organizational needs.
- Implement cross-platform display tools between the ALA Store and ala.org.
- Explore augmented, mixed and virtual reality platforms for onboarding, staff training, and CE for members.

Enterprise Management Tools

- Implementation of new projects defined by changes to organizational needs.
- Alternating years, iMIS or financial system update.
Look into Customer Relationship Management platforms using AI and machine learning to provide first line customer service responses. “Thanks to its powerful simplicity, customers may soon spend more time engaged with a company’s AI than talking to their people.”

When multiple contenders for an application appear viable, implement an early adopter tiered system for exploring options with the intent of ultimately adopting one enterprise-wide solution.


Refresh Disaster Recovery/Business Continuity (DR/BC) plan.

Annual review of technologies in use, environmental scan and plan adjustment.

Dashboard Informatics

Refine data dashboards with graphic capabilities—staff want to use our data in real time to learn about our members and to be guided in their decision-making.

Technical Infrastructure

Implement necessary infrastructure to support association objectives.

Communications, Training & Staff Development

Continue to improve, orient, and maintain staff technical skills sets.

Resources

Investigate resources needed to achieve association goals.

References


1.0 ALA WEB-RELATED

1.1 ECOMMERCE FOR JOIN/RENEW/REJOIN/DONATE

Since January 1, 2017, the system has processed 10,350 dues and 721 donations. We have received several compliments on the new system. The Development Office reports that ALA has seen increased donations in response to their efforts, which are supported by the ease of use of the new system. In general, people seem to really like it. We are continuing to plan for refinements and extensions.

1.2 NEW ESTORE AND ELEARNING ECOMMERCE SYSTEM

Re-integration with ALA Publishing’s fulfillment vendor having been completed, ITTS has been working with our implementation vendor on building a new eStore as quickly as possible. Designs and development are nearing their milestones for completion. Key integrations with fulfillment vendors, Publishing’s eLearning providers, and ALA systems are currently being finalized. Testing, content migration and training will follow once we have achieved sufficient progress with development.

The ALA-wide eLearning portion of the project will be accomplished as phases 2 and 3 of the eStore project—resulting in an integrated store that includes all eLearning events and products, with division offerings displayed both in their own exclusive areas and integrated into topical offerings.

1.3 RESPONSIVE THEME FOR ALA.ORG AND DIVISION WEBSITES

We upgraded the servers and are now working on site migrations for the streamlined ALA information architecture. Staff are filling out the 2017 Redesign Form to get queued up to have their sites rethemed. We hope to have several rethemed sites ready by the time Annual rolls around.

1.4 SEARCH ENGINE

We are close to launching the responsive design. As part of the retheming, we will change out the search box on each site to use the Google Search Appliance. The GSA will provide federated search results, when applicable.

1.5 NEW GENERATION ALA CONNECT

We are thrilled to announce that we have arrived at the testing phase the new ALA Connect. Stakeholders and members of the Website Advisory Committee (WAC) have been sent a Test
Plan. The plan includes credentials, instructions and access to a Bug Tracker to assist us. We are working on the setup of Division and Round table branding. The ALA Executive Board is also going to test the system prior to launch.

The new site includes 2-click navigation to any Division or Round table space in Connect, as well as a robust profile that allows users to update their address and demographic fields in iMIS. Demographics such as Interests, Type of Library and Ethnicity are a few fields now available to help members find common interests. Email notifications will be automatically turned on for all committee and community members, who can easily manage opt-outs, privacy and email frequency.

Upon launch, we plan to reward users who add a photo and complete at least 80% of their profile within the first 30 days’ post launch a chance to win BIG. Details on this promotion will be forth coming.

When we are ready to launch, the current site will be locked down for two weeks to migrate content from the old ALA Connect to the new ALA Connect. Training plans include over thirty (30) opportunities for LIVE training for staff and members (remote and in-person) as well as step-by-step training videos available to all users upon launch. More details about the features, best practices and training schedules will be posted on ALA Connect and sent out soon.

1.6 MOODLE

In Fall 2016, we upgraded the Moodle software to 3.0 and then combined our two Moodle courseware sites as recommended in the IT Review Report. The site is being used by ALA Publishing, the divisions and other units. 323 synchronous and asynchronous courses are currently listed and available to be offered or sold by ALA Online Learning or in the ALA Store.

1.7 ACCESSIBILITY TESTING PROTOCOLS

ITTS worked with a select group of members organized by Mike Marlin to accessibility test Blackboard Collaborate Ultra at the participant and moderator levels for members who use visual and/or auditory assistive devices. Because screen reader users had some trouble figuring out the interface, ITTS is asking Blackboard to help us schedule a test session just for screen reader users. On the whole, participants did think that it has potential for being ALA’s enterprise level, accessible meeting platform. More to come.

1.8 SHIBBOLETH

ITTS is working to install Shibboleth single sign-on software for Digitell and eShow for AASL’s online recordings and National Conference registration systems, respectively.

1.9 SYMPA
As part of our email migration, we changed our outbound mail routing for Sympa. Our minimum of 5,000,000 messages per month limited our choices. We selected MailChannels as a relay host. We’re working with them to refine their spam detection configuration to better suit our requirements.

2.0 HARDWARE & SOFTWARE

2.1 NEW TELEPHONE SYSTEM

The implementation of the new telephone system was moved to the next fiscal year, which starts in September. The installation is planned for the fall of 2017.

2.2 FILR AND FILE MIGRATION

FILR was upgraded and rolled out for staff access to our internal file shares. Over the Memorial Day weekend, we moved network files to a new server with upgraded infrastructure and space for expansion.

2.3 CITRIX

We are replacing our Citrix farm with the current version. This will improve external access to some of our applications and stabilize our internal financial system.

3.0 ITTS ORGANIZATIONAL CHANGES

3.1 STAFFING

I’m pleased to announce that Brian Willard, MBA, CAE has joined the ALA ITTS team in the position of Senior Business Intelligence Analyst/Project Manager in February 2017. He reports to ITTS and ALA Marketing.

Brian will help us improve our business intelligence by interpreting data using a variety of techniques, ranging from simple data aggregation via statistical analysis to complex data mining. Brian will be responsible for equipping staff with information that will allow them to implement more strategic and targeted business strategies and outreach, increasing response rates and revenue while also delivering a more effective member experience. He will work directly with staff to identify analytical requirements. He has knowledge of commonly-used concepts, practices, and procedures within the data marketing field. He will assist staff with data extraction projects from the membership database and present data in a usable format that meets their requirements. He brings many years of experience managing IT projects; we plan also to use these skills and expertise to help manage ITTS projects and Division data mining projects.
We continue to have four ITTS staff members taking intermittent family leave for various reasons. Some of our timelines may have to be adjusted going forward.

3.2 NEW PROPOSED IT ADVISORY COMMITTEE COMPOSITION RECOMMENDATION TO THE COMMITTEE ON ORGANIZATION (COO)

We (the ALA Website Advisory Committee-WAC) met and discussed the comments on committee composition of the new IT Advisory Committee received from the ALA Committee on Organization (COO) for the proposed metamorphosis of WAC into the new IT Advisory committee. COO asked that the WAC consider altering the composition of the new committee to streamline or limit membership. WAC came to the conclusion that the composition of the committee is representative of the various parts of the association. WAC recommends keeping the composition the same. WAC will meet with COO at the Annual conference to justify this recommendation and obtain approval to move forward with the title change, charge change, and composition.