

# ALA Information Technology

Strategy & Project Summary of Operating and Capital Investments

ALA Annual Meeting – June 2019

FY19-FY24

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# DelCor ITMM Summary

The American Library Association (ALA) engaged DelCor Technology Solutions (DelCor) in October 2018 to conduct a high-level assessment of the Association's current and planned technology environment/initiatives and overall use of technology to serve members and accomplish business goals.

The goals of the report were to provide insight on 4 key areas with progress to date from the start of the interim CIO on February 5, 2019 and are on the following slides:

- Network Infrastructure
- Data Management
- Digital Presence
- Technology Management

# FY19 ITMM Recommendations and Progress

## High Level Infrastructure Recommendations:

- Adopt “Cloud-First” approach to IT services, avoiding a “forklift” approach.
  - ✓ Allows ALA to host environments offsite through a provider for better security and management and cost savings
- Simplify network and IT services, prioritizing sunseting of legacy services.
  - ✓ Streamline IT services and gain cost savings through eliminating old platforms
- Complete a Cybersecurity Assessment by Connections.
  - ✓ Identifies security issues to be addressed and manages compliance standards

## Progress to Date:

- ALA will proceed with the plan of *temporarily* co-locating the existing servers at an off-site data center.
- The office move plan and budget have been created.
- ALA will decommission the legacy services Novell and Windows 2008 environments.
- A total laptop refresh will be completed by September 2019.
- Knowbe4 Security training will be rolled out annually to all ALA staff.
- The Security Audit was completed and the two most vulnerable servers are scheduled for removal by July 2019.

# FY19 ITMM Recommendations and Progress

## High Level Data Recommendations:

- Establish data leadership.
  - ✓ Provides strategic direction for IT and better overall management of the IT function
- Conduct a data inventory exercise/review data architecture.
  - ✓ Helps ALA understand what data is relevant and provides data definitions and better data usage
- Engage in data governance.
  - ✓ Enhances data policies, procedures and compliance with relevant regulations
- Continue with Salesforce pilot, seek opportunities to streamline.
  - ✓ Focuses on Advocacy enhancements and fundraising enhancements
- Decrease dependency on centralized database (iMIS), re-evaluate integrations.
- Explore data lake/warehouse options for business intelligence.
  - ✓ Increases the ability to pull data from a disparate sources for more flexibility in reporting

## Progress to Date:

- The Salesforce Pilot is scheduled for go live in July 2019. A demo will be provided to the Board.
- IT staffing for a Data Analyst has been completed to start working on enhancing Business Intelligence capabilities.

# FY19 ITMM Recommendations and Progress

## High Level Digital Recommendations:

- Complete digital asset inventory (reduce, consolidate, deprecate).
  - ✓ Helps ALA understand what digital assets are relevant and eliminates outdated sites for increased productivity and a better user experience
- Initiate content audit (again, reduce, consolidate, deprecate).
  - ✓ Streamlines content and enhances the search capabilities
- Develop digital strategy and enforceable supporting policies.
- Continue to assess/refine *ALA Connect*, focusing on core features and functionality while identifying/validating core business requirements.
  - ✓ Continues to provide a better user experience

## Progress to Date:

- We have posted the position and begun interviews for a UX Manager in IT.
- The digital asset audit has been completed. Final count: 265 digital properties (excludes ALA Connect, email marketing, social media)

### Next Steps:

- ✓ Decrease Digital Property Footprint. Goal is to decrease number of sites by 30-40%
- ✓ Develop & Enforce Digital Protocols
- ✓ Enforce standards when creating new properties
- ✓ Enforce archiving protocols around decommissioning sites
- ✓ Start work on Digital/Content Strategy

# FY19 ITMM Recommendations and Progress

## High Level Technology Management Recommendations:

- Fill the technology leadership gap: hire a CIO. Develop overarching technology strategy (org-wide).
  - ✓ Provides strategic leadership in IT
- Identify business owners for key applications.
  - ✓ Creates an environment of two way communication and understanding
- Focus on end-user support: increase technical resources (in the short-term).
  - ✓ Quicker resolution of issues increases productivity and reduces vendor costs
- Augment Business Analyst/Project Management functions.
  - ✓ Increases monitoring of projects so that are on time and on budget

## Progress to Date:

- We have changed the ITTS name to IT.
- An interim CIO is in place from DelCor and a permanent role is in the investment budget for FY20.
- A new IT organizational structure has been recommended.
- A weekly high level project priority list has been created.
- An IT Project Manager is in place to support enterprise IT projects.
- A Training Specialist has been hired.

# ALA IT FY18 Compared to FY24 Snapshot

*Comparing FY18 (prior to investment) to estimated FY24 after the investment dollars have been spent*

**FY18** – Total IT positions 12 FTEs (1 position eliminated 2019)

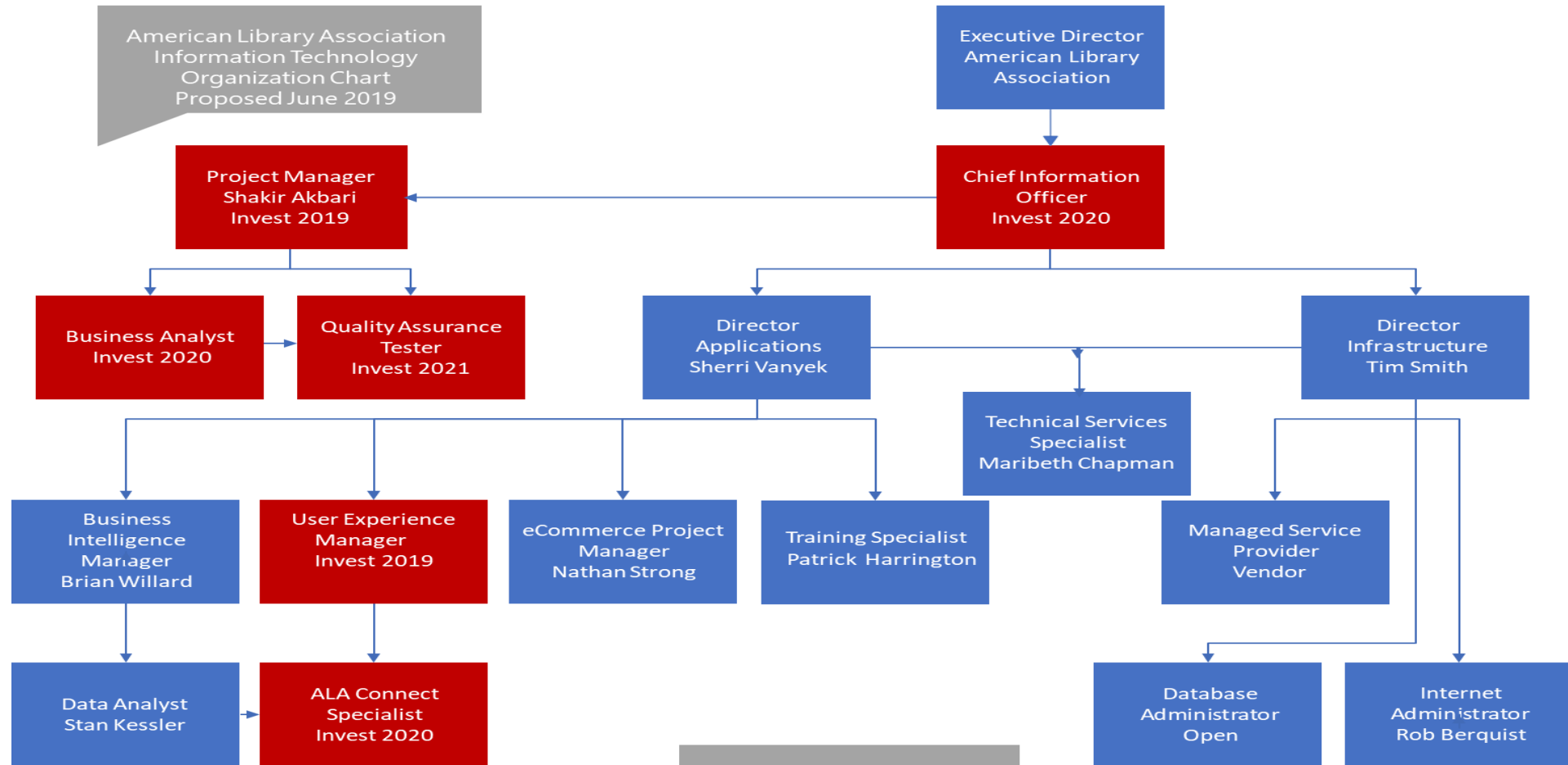
Total Actual Expense            \$3,068,117 capital + operating

**FY24** – Total IT positions 15 FTEs (4 investment positions added)

Total Estimated Budget        \$3,780,000 capital + operating + savings

# Proposed IT Org Chart

American Library Association  
Information Technology  
Organization Chart  
Proposed June 2019



Blue = Current position  
Red = Investment position

Blue = existing position  
Red = Investment position



# FY19 Sample of IT Project Action Plan

Line #	Lead	Name / Description
1	Erick	Laptop Rollout
2	Nathan	Dues and Donations
3	Tim / Rob	Shibboleth Upgrade
4	Shakir	Connect Workspace
5	Shakir	Connect Mentoring
6	Shakir	Connect Redesign
7	Nathan / Shakir	Membership Auto renewal
8	Brian	Informz Migration
9	Brian / Shakir	Informz Drip Campaign
10	Brian	Salesforce
11	Nathan	Ecommerce Upgrades
13	Patrick / Andy / Sherri	KnowBe4: protection from email phishing
14	Dan	Digital Inventory
15	Andy	Co-Location for data center / servers
16	Andy	Track-IT replacement / upgrade
17	Andy / Shakir / Tim	PCI Compliance for all payment processing
18	Shakir	MS Teams
19	Tim / Shakir / Andy / Sherri / Jim	Office move project

IT Project Status Report  
05/27/19

Line#	Lead	Name / Description	Status	Deployment Date	Health
1	Erick	Laptop Rollout	Prepping for phase 3 (40 laptops).		●
2	Nathan	Dues and Donations	Beta 3 – Stakeholders meeting occurred this week and set priority for backlog of requests. Autorenewal came up as priority #1	06/06 (Beta 3)	●
3	Tim / Rob	Shibboleth Upgrade	Testing latest version in progress.		●
4	Shakir	Connect Workspace	Initial pilot phase completed – we are compiling issues and working on resolving / putting them on a roadmap.	Q3	●
5	Shakir	Connect Mentoring	Shakir met with Jim and Sherri to discuss feedback received thus far and analysis on current programs. We will reach out to unit managers and admins to determine how this module can support their programs w/o 5/27	Q3	●
6	Shakir	Connect Redesign	Design mockups received and are being refined.	Q3	●
7	Nathan / Shakir	Membership Auto renewal	Requirements reviewed internally and have been fleshed out. We need to define the current payment processing as a baseline so that we can be specific about the changes to it. This is in progress.		●
8	Brian	Informz Migration	Project plan created. Announcement emails sent to unit managers and people requesting new campaigns.		●
9	Brian / Shakir	Informz Drip Campaign	Dependent on completion on Informz Migration.	Q3/4	●
10	Brian	Salesforce	We have signed off on the Data Mapping demo 3 is scheduled for 5/28	Q3	●
11	Nathan	Ecommerce Upgrades	1.8 is deployed on dev – there are 7 open issues which are being worked through on 1.8 1.92 delivered by Promet ready to deploy to dev 1.92 delivered by Promet on 5.15 A security update successfully was deployed 5-22 afterhours.	5/31 (Hotfix)	●
13	Patrick / Andy	KnowBe4: email phishing	After we confirm settings with KnowBe4 support we'll be ready to turn on campaign	Q2	●
14	Dan	Digital Inventory	Dan presented findings to Mary Ghikas and senior management on 5.21.		●

Project Health Key:
●: Project is within budget, timeline, & expectations.
●: Project is at risk / needs attention. Project is delayed up to 3 days.
●: Project has encountered a major setback, is over budget, or is outside the expected parameters. Project is delayed more than 3 days.

# ALA Technology Investment FY19-FY24

*FY19 – FY24 – Total Investment Budget - \$6,617,764*

## ***Requested Investment Budget:***

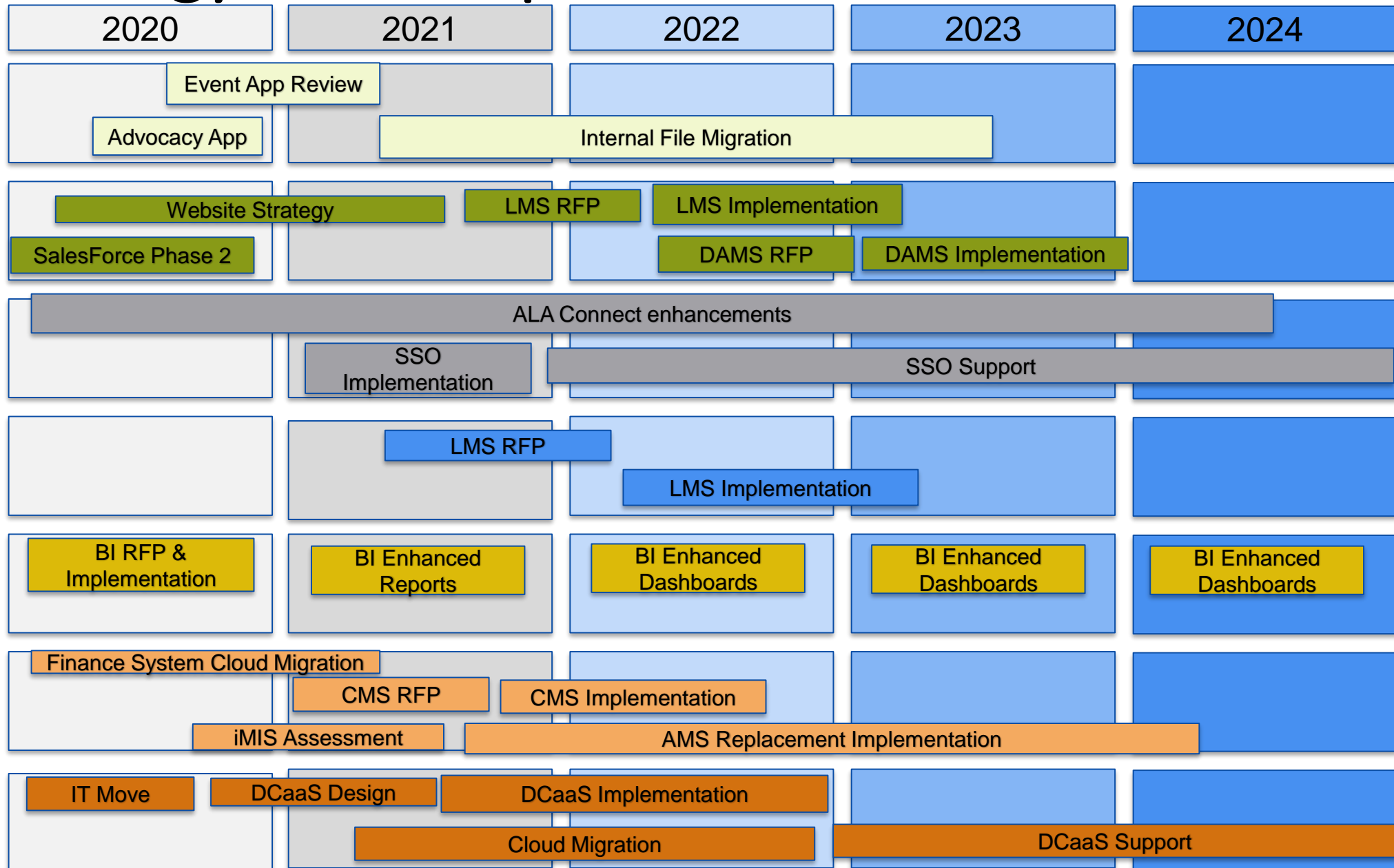
*\$1,360,498 FY19 operating + capital*

*\$5,257,266 \$4,273,800 operating FY20-24*

*\$983,466 capital FY20-24*

*FY20-FY24 Roadmap and projects listed on next slides*

# ALA Technology Roadmap FY20-FY24



# FY20 Overview of Projects Costs

- Move to new location (separate budget) - \$931,000
  - Unified Mgmt. Platform, Co-Location, Cloud, Wireless, Phones, Consulting
- Business Intelligence Software implementation - \$100,000 (capital)
- CRM Salesforce implementation phase 2 - \$127,000 (capital)
- Financial System Cloud Migration - \$50,000 (operating)
  - Migrate Great Plains to the cloud version
- Single Sign-On Support - \$16,000 (operating)
- Data Center Design - \$65,000 (operating)

# FY20-FY21 Overview of Investment Positions

- Chief Information Officer - \$89,422 with benefits (assume April 2020 start)
- Business Analyst - \$90,000 with benefits (assume Sept 2019 start)
- ALA Community Specialist - \$84,500 with benefits (assume Sept 2019 start)
- UX Manager - \$130,000 with benefits (assume Sept 2019 start)
- Quality Assurance Tester - \$84,500 with benefits (assume Sept 2020 start)
  - Assist with QA Testing of all software upgrades and enhancements

# FY20-FY24 Estimated Direct Savings for IT Projects

- Data Center as a Service Project –  
Estimated savings of \$50,000 in reduced cost per year in 2022 – 2024.
- Managed Service Provider –  
Estimated savings of \$60,000 in reduced labor cost in FY2020.  
Estimated savings of \$96,000 in reduced labor cost annually in FY21-24.

Total estimated savings of \$594,000 for FY20-FY24.

# Thank you!

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