

**ALA EXECUTIVE BOARD
SPRING BOARD MEETING**

SUBJECT: ALA IT Update

ACTION REQUESTED: Discussion

DRAFT MOTION: NA

REQUESTED BY: Mary Ghikas, Executive Director
Jim Gibson, Interim Chief Information Office
Sherri Vanyek, Director, ITTS

BACKGROUND:

At the end of FY2018, ALA contracted with DelCor, an IT consultancy focused primarily on associations of all types. Over a six-month period, DelCor completed extensive data gathering, delivering several reports to the ALA Executive Board at its 2019 Midwinter Meeting in Seattle. In January 2019, ALA additionally contracted with DelCor to provide interim, external Chief Information Office services, as well as additional technology consulting services, including an audit of ALA digital assets, now near completion of the initial (data gathering) stage,

Over the last three months, the Interim CIO has worked with ALA IT staff, ALA's Management Group, and other staff and contractors to create a new staffing structure in IT; to reevaluate IT investments planned for FY19, FY20 and beyond; and, to engage both staff and external contractors in the essential work of creating the essential framework for ALA operations and programs.

Planning for a potential headquarters move -- which not only requires significant and complex work from IT but also offers IT some unique opportunities -- had already been begun by ALA IT and moved forward during the past few months.

Two documents are attached:

- ALA Information Technology: Project Summary and Strategy for Implementation of Operating and Capital Investments
- ALA BARC/F&A Investment Report

ALA Information Technology

Project Summary

and

Strategy for Implementation of Operating and Capital Investments

Recap FY19

FY20-FY24

Jim Gibson, ALA Interim CIO

Sherri Vanyek, Director, ITTS



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Original ALA Technology Investment FY19

FY2019 – Investment Budget - \$1,360,498

\$632,200 operating

\$728,298 capital

Approved requests:

Virtualization Server Platform Replacement, \$70,000

eCommerce System Improvements, \$150,000,

SalesForce Advocacy/Development tracking system, \$145,000

IT Project Manager position, \$93,333 (Jan 2019-Aug 2019 includes benefits)

Drupal Web Developer position, \$76,667 (Jan 2019-Aug 2019 includes benefits)

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Revised ALA Technology Investment FY19

FY2019 – Investment Budget - \$1,360,498

\$632,200 operating

\$728,298 capital

Approved requests:

Virtualization Server Platform Replacement, \$70,000

eCommerce System Improvements, \$150,000,

SalesForce Advocacy/Development tracking system, \$145,000

IT Project Manager position, \$93,333 (Jan 2019-Aug 2019 includes benefits)

**Drupal Web Developer position, \$76,667 changed to User Experience Manager position (Jan 2019-Aug 2019 includes benefits)*

* = Change

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FY19 ITMM Recommendation Overview

High Level Infrastructure Recommendations:

- Adopt “Cloud-First” approach to IT services and transition services to Software or Infrastructure as a Service (SaaS or IaaS) platforms, avoiding a “forklift” approach.
- Simplify network and IT services, prioritizing sunseting of legacy services.
- Focus on remote user empowerment, including regular teleworkers and the DC and CHOICE offices.
- Cybersecurity Assessment to verify assessments done by Connection.

Progress to Date:

- ALA will proceed with the plan of *temporarily* co-locating the existing servers at an off-site data center and complete a transition of services to long-term SaaS/IaaS solutions after the office move. A move budget with this plan has been created.
- ALA will decommission legacy services such as its Novell and Windows 2008 server environments. A total laptop refresh will be completed before the move.

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FY19 ITMM Recommendation Overview

High Level Data Recommendations:

- Establish data leadership.
- Conduct a data inventory exercise/review data architecture.
- Engage in data governance.
- Continue with Salesforce pilot, seek opportunities to streamline.
- Decrease dependency on centralized database (iMIS), re-evaluate integrations.
- Explore data lake/warehouse options for business intelligence.

Progress to Date:

- The Salesforce Pilot continues with user testing and the pilot scheduled to go live in June 2019.
- ITTS staffing will be in place in FY19 to start working on enhancing Business Intelligence capabilities.

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FY19 ITMM Recommendation Overview

High Level Digital Recommendations:

- Complete digital asset inventory (reduce, consolidate, deprecate).
- Initiate content audit (again, reduce, consolidate, deprecate).
- Develop digital strategy and enforceable supporting policies.
- Clearly identify roles, responsibilities, and key processes. Transition responsibility for microsites, blogs, wikis out of ITTS. Continue to assess/refine *ALA Connect*, focusing on core features and functionality while identifying/validating core business requirements.

Progress to Date:

- The digital asset inventory is in progress with over 170 responses received from an internal survey. DelCor is conducting the inventory work.
- ITTS staffing will focus on the User Experience and ALA Connect in FY19.

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FY19 ITMM Recommendation Overview

High Level Technology Management Recommendations:

- Fill the technology leadership gap: hire CIO, CDO.
- Develop overarching technology strategy (org-wide). Review business processes.
- Identify business owners for key applications.
- Create/sustain productive, workable settings for technology discussion and decision-making.
- Focus on end-user support: increase technical resources (in the short-term).
- Augment Business Analyst/Project Management functions. Define baseline technology skills/provide contextual training.

Progress to Date:

- An interim CIO is in place from DelCor and a permanent role is in the investment budget for FY20.
- The ITTS organizational structure has been recommended to enhance Business Intelligence, Project Management, Training, Communities, and eLearning capabilities.
- A high level project priority list has been created.

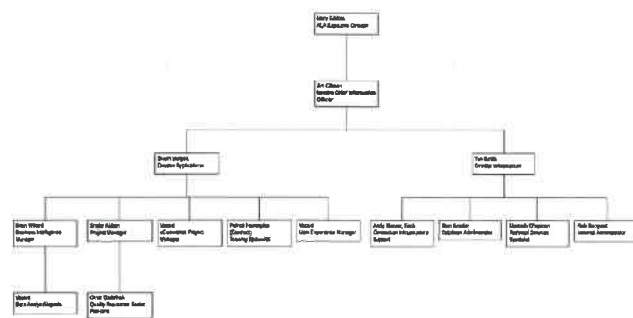
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FY19 Proposed ITTS Org Chart

Proposed FY19 ITTS positions:
 eCommerce Project Manager (replacement),
 Training Specialist (replacement),
 Data Analyst (replacement),
 User Experience Manager (investment \$ of repurposed Drupal Developer position),
 Project Manager investment position filled Jan 2019
 Current: 10.5 positions
 Proposed 11.5 positions



2019 Investment Positions - 11.5 positions
 Data Analyst - (Stan Keeler's old position)
 eCommerce Project Manager - (Oliver Pahl's old position)
 Training Specialist - (Phan Adair's old position)
 User Experience Manager - (Drupal Developer Position + ALA Connect Support Contract with Higher Logic)

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FY19 Overview of Key Project Action Plan

Project Category	Project Name	Priority	Status
E Commerce	Dues & Donations Ecommerce System: Build out lab environment of production	1	Complete
E Commerce	eStore/eLearning Ecommerce System: Testing various components of eLearning with iMIS Integration through ATS Web Services	2	In progress
SSO	Shibboleth/IDP Upgrade: new Java. Dev/Prod	3	In progress
iMIS	iMIS 2017 Upgrade: Dependent upon Shibboleth/IDP Upgrade	4	Not started
Salesforce	Salesforce CRM for Advocacy/Donations Tracking Phase I Pilot	5	In progress
Virtualization	Virtualization Server Platform (EOL Replacement) aka DMZ Replacement	6	Not started
PCI Compliance	Secure credit card processing	7	In progress
ALA Connect	ALA Connect: eConverse Work, Mentor Match, Workspace, Volunteer	8	In progress
Personal Computers	Windows 10 Rollout	9	In progress
Infrastructure	Completion of vSphere 6.5 rollout	10	Not started
Administration	Budgeting: for FY '20	11	In progress

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FY19 Overview of Key Projects and Outcomes

- Laptop and monitor rollout - \$150,000
 - Increase work force mobility and replace Windows 2007
- Virtual Server Platform upgrade - \$70,000
 - Replace end of life hardware
- Managed Services - \$124,000
 - Perform server maintenance and operating system updates
- PC Services – \$26,298
 - Perform workstation maintenance and upgrades

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FY19 Overview of Key Projects and Outcomes (cont.)

- eCommerce System Improvements - \$150,000
 - Add additional features including social sharing, chapter data collection, and division branding.
- Security Audit Remediation - \$75,000
 - Provide implementation of security protocols on systems found to be deficient after yearly security audit.
- Project Manager - \$130,000
 - Assist with completing projects on time and within budget, giving staff tools and resources needed to serve member needs effectively.

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ALA Technology Investment FY20-FY24

FY19 – FY21 – FY Investment Budget - \$6,822,161

Requested Investment Budget FY20-FY24:

\$6,022,466

\$5,039,000 operating

\$983,466 capital

Approved projects listed on next slides

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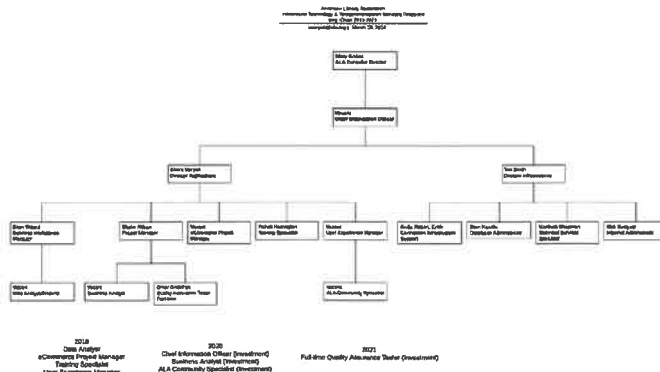
FY20-FY21 Proposed ITTS Org Chart

Proposed FY20 ITTS positions:

- CIO (Investment FY20),
- Business Analyst (Investment FY20),
- ALA Community Specialist (Investment FY20)

Proposed FY21 ITTS positions:

- Quality Assurance Tester (Investment FY21)
- FY19: proposed 11.5 positions
- FY21: proposed 15 positions



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FY20 Overview of Key Projects and Outcomes

- Move to new location - \$931,000
 - Unified Mgmt. Platform, Co-Location, Cloud, Wireless, Phones, Consulting
- Financial System Cloud Migration - \$60,000
 - Migrate Great Plains to the cloud version
- Single Sign-On Support - \$15,000
- Chief Information Officer - \$89,422 with benefits (assume April 2020 start)
 - Strategic leader of the ITTS department
- Business Analyst - \$90,000 with benefits (assume Sept 2019 start)
 - Assist with requirements and project management
- ALA Community Specialist - \$84,500 with benefits (assume Sept 2019 start)
 - Assist with ALA communities and ALAConnect

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FY21 Overview of Key Projects and Outcomes

- Learning Management System (LMS) Licenses - \$50,000
- Financial System Cloud Migration - \$36,000
 - Migrate Great Plains to the cloud version
- Single Sign-On Support - \$16,000
- File Share Migration - \$30,000
 - Select and implement file share solution
- Data Center Design - \$65,000
- iMIS Assessment - \$100,000
 - Potential replacement of iMIS with Salesforce

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FY21 Overview of Key Projects and Outcomes (cont.)

- Content Management System (CMS) Selection - \$20,000
- Quality Assurance Tester - \$84,500 with benefits (assume Sept 2020 start)
 - Assist with QA Testing of all software upgrades and enhancements

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Thank you!

Jim Gibson (jdgibson@delcor.com)
ALA Interim CIO

Sherri Vanyek (svanyek@ala.org)
Director, ALA ITTS



ALA BARC/F&A Investment Report

Date 3/25/2019

INVESTMENT AREA: IT

Investment Description:

What was the total investment amount requested over the three-year period and by year (FY19, FY20, FY21)?

FY2019 – Investment Budget - \$1,360,498

\$632,200 operating

\$728,298 capital

FY19 – FY21 – FY Investment Budget - \$6,822,161

Requested Investment Budget FY20-FY24: \$6,022,466

\$5,039,000 operating

\$983,466 capital

Investment Purpose & Benefits:

How did you plan to use the investment funding and what were the desired benefits at the end of the three- year period? At the end of the first year (FY19)? At the end of the second year (FY20)?

A project manager was added in January 2019, along with a part-time QA tester. Key infrastructure projects include laptop and monitor rollout, virtual server platform upgrade, server operating system upgrades, and security audit remediation. Software Improvements include eCommerce enhancements and an iMIS Membership System Upgrade. For FY2020, three positions were proposed: CIO, Business Analyst, and ALA Community Specialist. Software improvements include moving the financial system to the cloud and single sign-on support. A separate draft move budget was prepared for \$931,000. See attached PowerPoint Presentation to the ALA Executive Board for more details.

Investment Status:

What is the status of your investment plan as of Q2 FY19? Are you on track to expend the investment dollars and attain the desired benefits?

The eStore/eLearning eCommerce system is scheduled to be feature complete in April 2019. The Membership Dues and Donations eCommerce system major releases are back on track with an estimated catch-up of October/November 2019. Two modules will be added to ALA Connect, Mentor Match and Workspace. The Salesforce CRM project is on track for a summer implementation. We are on track to spend all of the investment dollars. We are over budget on depreciation expense due to the eCommerce projects. See attached PowerPoint Presentation to the ALA Executive Board for more details.