TO: ALA Executive Board

RE: Information Technology Report

ACTION REQUESTED/INFORMATION/REPORT:
Report

ACTION REQUESTED BY:
None

CONTACT PERSON:
Gina Seymour, ITAC Chair, 516-220-7285, seymourgina@gmail.com
Sherri Vanyek, 312-735-2597, svanyek@ala.org

DRAFT OF MOTION:
None

DATE: October 11, 2021

BACKGROUND:
Update on FY2021 projects continued in FY22, FY22 budget, and major IT goals for FY22 and beyond

ATTACHMENTS:
None
ALA Technology FY21 Projects Continued

• Assist with the New Continuing Education Learning Management/eCommerce System Implementations
• Continue to upgrade Shibboleth Single Sign-On Software to the remaining websites
• Continue with the final phase of implementation of eStore shopping cart integration with the new fulfillment Vendor Chicago Distribution Center (CDC)
• Continue the migration of 75 of 100+ blogs to the cloud
• Continue to monitor revenue and membership goals by creating new dashboards
ALÀ Technology FY21/FY22 Budget

FY21 Operating Budget $3,162,709
FY22 Operating Budget $3,578,368

Represents a total increase of $415,659 for:

• Hiring a new Chief Information Technology Officer
• Licensing for the new CE Learning Management/eCommerce Systems
• Consulting for the iMIS Membership System Upgrade
• Consulting for the Data Center As a Service Design
• Consulting for a new Website Strategy
• Clean up data in the iMIS membership database
• Drupal Web Content Management System Upgrades
FY22 Overview of Proposed Project Costs

- Learning Management/eCommerce System - $50,000 (operating)+$150,000 (capital)
- iMIS Membership System Upgrade - $50,000 (operating)
- iMIS Database Cleanup - $27,000
- Data Center as a Service (DCaas) Design - $63,000 (operating)
- Drupal/PHP/Linux System Upgrades - $100,000 (capital)
- Web Content Management/Web Strategy Assessment - $20,000 (operating)
Goal 1: iMIS Upgrade

Description: Upgrade our iMIS Association Management System

Deliverables:
• Implement web-based access to the iMIS Association Management System
• Provide additional dashboards

Detailed Description: iMIS is our current Association Management System (AMS) for our membership database which contains dues, donations, subscriptions, orders, and committee volunteer activity records. An iMIS upgrade in FY 2022 provides us with additional time to figure out the best long term AMS solution. It also provides us the opportunity to simplify our complex business rules (i.e. New Membership Dues Model implementation). The iMIS system is heavily integrated with approximately 25 other systems. These systems exist both in our internal and external infrastructure (cloud-based). Due to its size and complexity, replacing the AMS is a multi-year project requiring an assessment, RFP, vendor selection, and implementation.

Check primary Pivot Stream: ☒ Conference and Events; ☒ Continuing Education; ☒ Contributed Revenue; ☒ Data and Research; ☒ Membership; ☒ Publishing
Goal 2: Clean up data in the iMIS membership database

Description: Remove erroneous or redundant data from iMIS membership database

Deliverables:
• Identify attributes in the iMIS membership that need to be removed
• Examine records for inconsistencies
• Define and develop the merge routine
• Train MRS on how to merge duplicate records

Check primary Pivot Stream:
☒ Conference and Events; ☒ Continuing Education; ☒ Contributed Revenue; ☐ Data and Research; ☒ Membership; ☒ Publishing
Goal 3: Work with all revenue generating units to identify and establish new revenue products or services

Description: Create technology products to sell

Possible Deliverables to explore:
• Data trackers for programs to sell (work with PPO)
• OverDrive – build a program to stream the best programs
• Put content behind a pay wall – create channels for data streams going in and out.
• Track what libraries need and deliver paid subscriptions to data
• Place advertising on websites
• Repackage content to sell

Check primary Pivot Stream:
☒ Conference and Events; ☒ Continuing Education; ☒ Contributed Revenue; ☒ Data and Research; ☒ Membership; ☒ Publishing
Goal 4: Continue to monitor revenue and membership goals

Description: Build more dashboards to monitor the major Association-wide goals in the Pivot Plan

Deliverables:
• Identify baseline dates and numbers
• Create dashboards to be able to monitor progress

Check primary Pivot Stream:
☒ Conference and Events; ☒ Continuing Education; ☒ Contributed Revenue; ☒ Data and Research; ☒ Membership; ☒ Publishing
**Goal 5: Adopt Data Center as a Service Design model**

**Description:** Contract with a consulting firm to perform Data Center as a Service (DCaaS) design to prepare to move offsite data services to the cloud.

**Deliverables:**
- Develop a plan to move all offsite data services to the cloud.

**Detailed Description:**
When we moved to the new headquarters office, we anticipated moving most of our infrastructure to the cloud. However, there was not enough time, resources, or money to move approximately 140 virtual servers and infrastructure to the cloud for the move. Instead it was decided to reduce the footprint at the new headquarters office and contract with a co-location facility for approximately two years to house our internal infrastructure. This DCaaS design project in FY 2022 will lay out the plan to move the co-location services to the cloud as originally planned. Moving to the cloud will reduce the likelihood of network and server outages, will enable us to host our servers and network infrastructure offsite instead of paying for and maintaining our own, will provide 24/7/365 support without requiring costly overtime charges from consultants, will free up IT staff time for projects, and will allow staff to access the datacenter, view their dashboards, and run reports from anywhere at any time.

**Check primary Pivot Stream:**
- ☒ Conference and Events; ☒ Continuing Education; ☒ Contributed Revenue; ☐ Data and Research;
- ☒ Membership; ☒ Publishing
Goal 6: Website Strategy Consulting

Description: Contract with a consulting firm to explore our future Website Strategy

Deliverables:
• Develop a plan for future websites

Detailed Description:
Our support for our version of Drupal (our Web Content Management System) for the main ala.org website and Drupal commerce sites ends in November 2022, which is FY 2022 for ALA. These upgrades will buy us time to move or replace these applications going forward and are necessary to provide security updates so the systems will not be breached.

Our Content Management System (CMS) and Website Strategy Assessment in FY2022 will guide us in replacing or upgrading our main ala.org Drupal Web Content Management System to create the ability to organize content by topic with a focus on our external audience instead of organizing content by ALA's internal structure.

Check primary Pivot Stream:
☒ Conference and Events; ☒ Continuing Education; ☒ Contributed Revenue;
☐ Data and Research; ☒ Membership; ☒ Publishing
IT Dept Scorecard

**Tracklt**
- 9/1/2020 – 8/31/2021 (Last FY)
  - Opened: 2463 | Closed: 2262 | Still Open: 201
- 9/1/2021 – 9/30/2021 (Sept. 2021)
  - Opened: 269 | Closed: 208 | Still Open: 61

**ALA.org**
- 9/1/2020 – 8/31/2021 (Last FY)
  - Page Views: 18,577,412
- 9/1/2021 – 9/30/2021 (Sept. 2021)
  - Page Views: 1,938,122

**Connect**
- 9/1/2020 – 8/31/2021 (Last FY)
  - Posts Created: 35,164
- 9/1/2021 – 9/30/2021 (Sept. 2021)
  - Posts Created: 4,170

**Dues & Donations eStore**
- 9/1/2020 – 8/31/2021 (Last FY)
  - Page Views: 2,025,113
- 9/1/2021 – 9/30/2021 (Sept. 2021)
  - Page Views: 179,054

**KnowBe4**
- American Library Association
  - Phish-prone Level: 2.1%
- Other Organizations
  - Phish-prone Level: 16.9%
**Example of an ALA Business Intelligence Dashboard**

### ALA Membership Dashboard - Current

<table>
<thead>
<tr>
<th>Category</th>
<th>Current</th>
<th>Grace</th>
<th>Active Members</th>
<th>Post Grace</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>41,427</td>
<td>12,401</td>
<td>53,828</td>
<td>2,870</td>
<td>56,698</td>
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<tr>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>$1,303,267</td>
<td></td>
<td></td>
<td>$337,950</td>
<td></td>
</tr>
</tbody>
</table>

### Member Types

- Regular Member
- Life Member (LD, LN, L)
- Libraries (L1-L5)
- Retired Member
- Prospective Org
- Non-Salaried Libr
- Support Staff Member
- Trustee Member
- Associate Member
- Internatl Library
- Non-Profit Org
- Friends of ALA

### Length of Membership

- Number of Members vs Years of Membership

### Top 5 States

<table>
<thead>
<tr>
<th>State</th>
<th>Number of Members</th>
</tr>
</thead>
<tbody>
<tr>
<td>CA</td>
<td>4652</td>
</tr>
<tr>
<td>TX</td>
<td>3749</td>
</tr>
<tr>
<td>IL</td>
<td>3722</td>
</tr>
<tr>
<td>NY</td>
<td>3706</td>
</tr>
<tr>
<td>PA</td>
<td>1987</td>
</tr>
</tbody>
</table>

### Top 5 Countries

<table>
<thead>
<tr>
<th>Country</th>
<th>Number of Members</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA</td>
<td>52168</td>
</tr>
<tr>
<td>Canada</td>
<td>973</td>
</tr>
<tr>
<td>Australia</td>
<td>66</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>43</td>
</tr>
<tr>
<td>Japan</td>
<td>41</td>
</tr>
</tbody>
</table>
Thank you!

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