

TO: ALA Executive Board

RE: ALA ITTS update on progress made on priority projects

ACTION REQUESTED/INFORMATION/REPORT:

Report

ACTION REQUESTED BY:

Sherri Vanyek, Director Information Technology & Telecommunication Services (ITTS)

CONTACT PERSON:

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DRAFT OF MOTION:

None

DATE: 03/22/2017

BACKGROUND:

ITTS update on progress made on top priority projects and the ALA IT External Review Recommendations.

ATTACHMENTS:

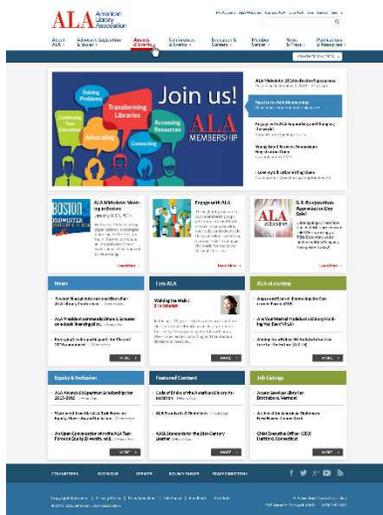
RESPONSIVE REDESIGN PROGRESS REPORT

We're closing in on the completion of the retheming of ala.org and all associated microsites, including all the division microsites on ala.org. The responsive nature of the redesign ensures that the sites will resize to display appropriately on cell phones, tablets and desktop computers. It will also bump us up in mobile search results.

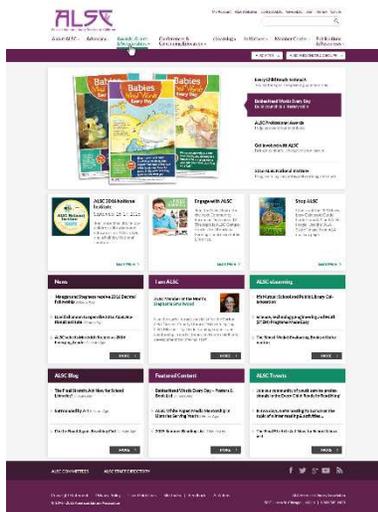
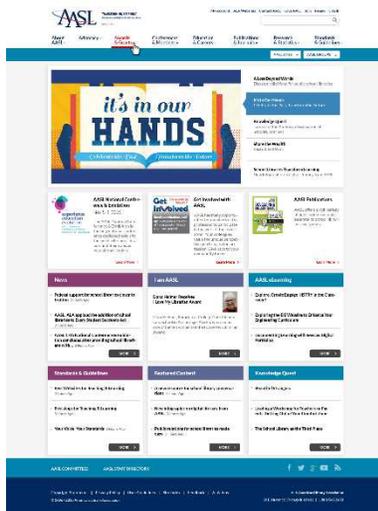
ITTS used the retheming as an opportunity to make essential infrastructure upgrades to servers that include new set-ups of development, quality assurance and production web servers. Once the servers are ready, behind the scenes site migrations required to streamline ALA's information architecture will take place. The changes to the information architecture reduce the number of ALA microsites by about half and will also reduce the time required to make site back-ups and to perform updates.

Retheming of microsites will commence following the site migrations. ITTS expects retheming to happen relatively quickly thanks to information sessions held with site stakeholders and the creation of a webform for them to communicate their final design choices.

We are accommodating units' preferences for holding off their retheming based on event schedules, but expect to have all sites completed this spring.



Look at the paper design mock-ups to get an idea of what the sites will look like. *(The global menus will have dropdowns, just like the current site, although an example hasn't been shown in the mockups.)* [Download the full size images on the ITTS blog.](#)



NEW ALA CONNECT UPDATE

1. PROJECT SUMMARY

ALA Connect is an online community where members, staff, and supporters of ALA gather virtually to do the work of the Association, collaborate in communities of practice and other groups, find cooperative and innovative colleagues, discuss library-related topics and issues, share ideas, and discover other ways to engage and participate.

What follows is an update on the forthcoming upgrade to ALA Connect, designed above all to support ALA members through a user-friendly platform that meets their needs, providing easy paths to share input, learn, and engage with ALA and its divisions, offices, and other units in multiple ways.

The new ALA Connect system is on track for a summer 2017 rollout. Three different vendors making a concerted effort with us to implement 33 different microsities with over 2,500 groups/communities, as well as to train users so the user experience is the best and most useful it can be.

2. WHERE WE ARE

Below is a list of high-level project milestones highlighting the work accomplished so far in coordination with the three vendors:

1. Higher Logic (host of the new ALA Connect site)
2. eConverse Social Media (designer of the interface for the new ALA Connect)
3. Urban Insight (host of the current Connect site in Drupal)

Project Milestones

Milestones	Completed
Tagging Hierarchy feature added. Alterations to base code to accommodate our extensive need for tagging.	5/2016
Nested Communities created. Alterations to base code to accommodate the hierarchy and search function across unit sites. ALA identified and negotiated for 33 microsities to accommodate the Divisions, Round Tables, and the ALA-APA (Allied Professional Association).	5/2016
Membership Data Sync. Modifications to the system to import our membership data directly from ALA's Membership database iMIS, with which ALA Connect will communicate directly.	8/2016
Interface Designer hired. The eConverse Social Media team began discovery with ALA.	10/2016
New Connect Logo designed. Stakeholders collaboratively selected a new logo created by the ALA Production Services department.	12/2016
New Connect Interface drafted. The first round of interface designs was delivered for review.	2/2017
Current Connect Groups review. ITTS started work with the administrators of 2,500+ groups and communities to document what content needed migrating into the new Connect system, so everyone will have full access to the content they identified for migration.	2/2017
Profile work begins. Work has begun to develop new ALA Connect profile pages so users can update their contact and demographic information there, and it will then automatically update in ALA's Membership database.	3/2017

3. LAUNCHING THE NEW ALA CONNECT

As the proposed launch date would have been too close to the ALA Annual Conference, a soft launch is planned for late July/early August. The full implementation is scheduled for September 2017. This will allow time to develop and communicate best practices for working with all groups in the new system. It will also allow time for ALA staff to conduct thorough training for all users during the summer months. The Connect URL (connect.ala.org) and user credentials will remain the same in the new version of Connect. Since it is not possible to have both systems running at the same time, **the old system will not be available once the soft launch begins.**

4. TRAINING PLAN TO SUPPORT ALL USERS

We are investigating the possibility of creating a sandbox copy to use for training during the final migration, in which case we will offer 90-minute in-person and remote training sessions at multiple times and dates to accommodate different time zones. Recorded sessions and learning videos will also be available. We are planning sessions by user role, but also seek user feedback on tasks that are critical, so we can include them in the training.

Training by Roles

- ALA Connect for Members and logged-in users
- ALA Connect for ALA Staff
- ALA Connect for Community Admin
- ALA Connect for Testers/Early-Adopters
- Others as identified

Best Practices

- Contribute to/Start a discussion
- Add files to a Library
- Find your groups; Explore navigation; Understand “nesting”
- Understand/Review best practices for handling Private groups/public posts
- Understand best practice on how to post governance documents

ESTORE/ELEARNING ECOMMERCE PROJECT UPDATE

ITTS has been working with Publishing and ALA eLearning stakeholders to keep the ALA Store/eLearning project moving swiftly forward. This project will create a consolidated shopping venue for all ALA products, reduce the technical and financial risks of an antiquated ALA Store eCommerce infrastructure, improve internal product management and marketing capabilities, and significantly increase customer engagement. We have completed the approval process for wireframes for the store, and are currently combining those with the approved wireframes and requirements for the ALA eLearning registration site

into a single design. Our implementation partner Promet is currently working on this design. Data and content migration analysis as well as architecture and infrastructure planning are also underway.

When the new store launches in July, it will feature all the products currently offered in the ALA Store with an improved integration to our webinar vendor and a more secure, up-to-date integration with our fulfillment provider, PBD. We will also have implemented a new Drupal-based back office system for the management of products, customers and orders put in place the technological architecture for future improvements, and begun capturing member and non-member customer data in iMIS for enhanced business intelligence. The plan is for the new store to become the single registration site for all ALA eLearning products in August, and in September, for it to accommodate small in-person events.

STATUS OF IT EXTERNAL REVIEW RECOMMENDATIONS

1. Do not pursue replacing iMIS in the immediate future. Instead:
 - a. keep it updated (routinely);
ITTS is budgeted and scheduled to upgrade iMIS to its current release in FY2018.
 - b. devote resources to de-duplicating the records in it;
ITTS will work with Member and Customer Service on this effort in FY2017-FY2018.
 - c. devote resources to improving the quality of the data in the remaining, de-duplicated records; and
ITTS will work with Member and Customer Service on this effort in FY2017-FY2018.
 - d. devote resources to improving its report-generation capabilities.
ITTS added a Senior Business Intelligence Analyst/Project Manager in February 2017 to improve utilization needed for appropriate member engagement.
2. Maintain the plan and timetable for implementing a new, Association-wide e-Commerce platform.
An ecommerce system for Dues and Donations was launched in the October 2016. The eStore and Publishing's elearning ecommerce system is scheduled to launch in July 2017. The new ALA-wide eLearning ecommerce system is scheduled to launch in August 2017 with small face-face events in September 2017.
3. Recruit Content Management System Administrator.
ITTS will look at the feasibility of adding this position in FY2019.
4. Temporarily: migrate e-Learning content from the Association's Moodle instance to ALA Publishing's instance.
ITTS and Publishing launched a combined ALA Moodle courseware platform in November 2016.
Longer term: select and implement an Association-wide e-Learning platform.
5. Pursue a phased transition to Office 365.

ITTS is completed implementation of Office 365 in September 2016. The project was divided into two phases. The email migration and outbound routing of Sympa list server email was the first phase and the installation of Microsoft Office products (Word, Excel, and PowerPoint) was installed in the second phase.

6. Conduct a business process review of the payment approval process in order to identify bottlenecks and to evaluate whether adjustments can be made to the software and/or approval process itself.

The ALA Finance and Accounting department will conduct a business process review of the payment approval process in FY2018.

7. Commit, explicitly, to building/implementing web assets that are responsive.
All ITTS web-based projects that are currently underway and planned will be responsive.
8. Implement new responsive design template for ALA.org
ITTS has been scheduling sessions with division and other stakeholders to share a proposed timeline and discuss the resources required to apply the redesign to each microsite. The current timeline for ALA.org calls for the homepage redesign and theme changes to occur in the spring 2017, with rolling changes to all other microsites happening thereafter, as fast as ITTS and the responsible units can prepare them.
9. Convene a working group of ITTS and divisional staff to review and draft guidelines/activities for moving divisional sites to responsive template.
ITTS has been scheduling sessions with division and other stakeholders to share a proposed timeline and discuss the resources required to apply the redesign to each microsite. The current timeline for ALA.org calls for the homepage redesign and theme changes to occur in the spring 2017, with rolling changes to all other microsites happening thereafter, as fast as ITTS and the responsible units can prepare them.
10. Implement ALA Connect on the Higher Logic community platform.
The Higher Logic implementation is underway. The project is scheduled to launch in late July/early August 2017.
11. Continue to fund community manager staff position and budget for Higher Logic annual educational forum.
The position is funded and Pam Akins, our community engagement specialist, has been attending the annual educational forum.
12. Develop a training program for staff committee liaisons to champion and promote use of the platform for collaboration.
The plan for this will take place in April/May 2017, once we are closer to the launch of the new ALA Connect community platform.
13. Utilize ITTS Advisory Committee (see below) to explore the feasibility of adopting Volunteer Central.

An internal ITTS Advisory Committee has been appointed and began meeting in January 2017.

14. Explore the possibility of using HL microsites as the primary application for building grant sites.

The plan for this will take place in FY2018, once we have launch of the new ALA Connect community platform with Higher Logic.

15. Replace the telephone system, whether with a VOIP-based system or with some other technology that is fit for contemporary purpose.

ITTS is scheduled to replace the 17 year-old telephone system in FY2018.

16. Utilize the ITTS Advisory Committee (see below) to review and define to which staff and under what circumstances remote access to business systems can be extended.

An internal ITTS advisory Committee was appointed in January 2017. Remote access to all systems in the ITTS budget for FY2018.

17. Utilize the ITTS Advisory Committee (see below) to review and rationalize the various email marketing platforms currently in use within the Association.

An internal ITTS advisory Committee was appointed in January 2017 and will address this issue later this year.

18. Create an internal ITTS Advisory Committee to facilitate decision-making and communication.

An internal ITTS advisory Committee was appointed in January 2017.

19. Regularize—and increase the frequency of—implementation updates.

ITTS will develop a new plan for regular update communications for FY2017-2018.

20. Create and implement a system of Help Desk support tiers that is quantitative and time-based, not narrative.

ITTS will implement a new Help Desk support system in FY2019.

21. Institute mandatory ticketing.

ITTS will implement this after the new Help Desk system is installed and launched.

22. Recruit:

- a. A Project Manager.

ITTS and Publishing added an eStore Project Manager for an Association-wide eStore/eLearning eCommerce system. The position was funded by Publishing (50%) and ITTS (50%) and reports jointly.

- b. A Web Developer.

ITTS will look at the feasibility of adding this position in FY2019.

23. Allocate additional funding to development.

ITTS will look at additional funding for development in FY2019.

24. Consider relocating some training from ITTS to HR.

ITTS and HR will look at relocating some training to HR FY2019.

ADDENDUM: CUSTOMIZATION VS. STANDARDIZATION

Recommendations:

1. Mandate standardized implementation of technology platforms and applications, to the maximum extent possible.

ITTS will work with the new (beginning FY2017) ITTS Advisory Committee and with ALA Management to increase standardization, to both improve the overall user experience and to increase efficient use of resources. Work on the current eCommerce modules (Dues/Donations, eLearning, eStore) have involved collaborative processes and will provide a strong base for future improvement.

2. Require that any decision(s) to go off baseline are vetted with ITTS so that the full impact of any customization is understood by the unit/division requesting it, by ITTS, and by management.

ITTS is currently working with ALA Management to bring together into a consolidated Operational Practice, for internal discussion, both ALA policies (e.g. *ALA Policy B.3.2 – Library Services for People with Disabilities Policy*) and ALA operational rules (e.g. ITTS policies, Finance policies). This practice is intended to provide a consistent framework for future decision-making about IT and IT-related projects by all ALA units. The costs of both customization and unit-level outsourcing will be part of this discussion. ITTS review is included in the draft practice.

We have completed items: 1d,4,5,9,11,18, and 22a or 23% of the recommendations.