

**TO:** ALA Executive Board

**RE:** Information Technology Report

**ACTION REQUESTED/INFORMATION/REPORT:**  
Report

**ACTION REQUESTED BY:**  
None

**CONTACT PERSON:**  
Sherri Vanyek, 312-735-2597, svanyek@ala.org

**DRAFT OF MOTION:**  
None

**DATE:** January 7, 2021

**BACKGROUND:**  
Information Technology Strategy & Project Summary of Operating and Capital Investments

**ATTACHMENTS:**  
Information Technology Strategy & Project Summary of Operating and Capital Investments  
EBD#12.19  
Investment Spreadsheet FY22-FY26 EBD#12.19a  
ALA BARC/F&A FY19-FY26 IT Investment Update EBD#12.19b



# ALA Information Technology

Strategy & Project Summary of Operating and Capital Investments

ALA Executive Board January 2021 Meeting

FY21-FY26

Sherri Vanyek, Director IT

EBD #12.19

# 2020 IT Projects Review

DUES AND DONATIONS - CERTIFICATES AND RECEIPTS

RINGCENTRAL - CUSTOMER CENTER

DATA STORAGE SYSTEMS

CONNECT - MENU STANDARDIZATION

DATA CENTER CO-LOCATION

DOCUSIGN VS ADOBE SIGN

RINGCENTRAL - CONFERENCE ROOM PHONES

OFFICE MOVE

BUSINESS INTELLIGENCE / POWER BI

DUES AND DONATIONS - THRESHOLD INSTALLMENTS

AIRTABLE

CONNECT - SITE REDESIGN

CONTRACTSAFE

CONNECT - PRONOUN FIELD

PROJECT FACT SHEET

ASGCLA DISSOLUTION

CONNECT - MEMBERSHIP EXPIRATION WARNING

LAPTOP REIMAGING

OFFICE MOVE - STATE OF THE ART CONFERENCE ROOMS

NEW PRINTERS SCANNERS AND COPIERS

SYMPA TRANSITION

CORE MERGER

RINGCENTRAL - OFFICE PHONES

DIVISIONAL MEMBER PRICING CLOUD DNS ULTI PRO RECRUITMENT UPGRADE

MS TEAMS

BLOG HOSTING MIGRATION

SHAREFILE

TRIBUTE DATA INTEGRATED TO IMIS

# Reduction of IT Infrastructure Debt

- Replaced 7 DMZ virtual server hosts with 3 new hosts (used for external services)
- Replaced 2 internal storage systems with newer technology
- Retired 3 physical servers
- Replaced 24 wireless access points with newer technology
- Replaced all old network switches with newer technology
- Replaced phone switch with new VOIP Telephone System
- Upgraded 11 Virtualization Technology Systems
- Upgraded Active Directory Servers
- Removed 40 printers and replaced with 15 new shared printers

# Reduction in IT Infrastructure Debt (Continued)

- Installed new AV equipment in 25 conference rooms:  
7 medium/small, 3 webinar, 5 team/webinar, boardroom, 10 team rooms with speakerphones
- Installed equipment in new training room
- Installed new digital signage for reception & café
- Expanded the Citrix remote communication services
- Currently migrating Sympa List Servers to ALA Connect
- Currently migrating WordPress blogs offsite
- Scheduled to replace Citrix with a new VPN in January 2021

# ALA Technology Investment FY19-FY26

**FY19 – FY26** – Total Investment Budget - \$4,603,280 (savings of \$2,014,484 over original budget of \$6,617,764)

***Requested Investment Budget:***

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

*\$654,069 FY20 operating + capital*

*\$312,447 FY21 operating + capital*

*\$2,276,266 FY22-FY26 operating + capital*

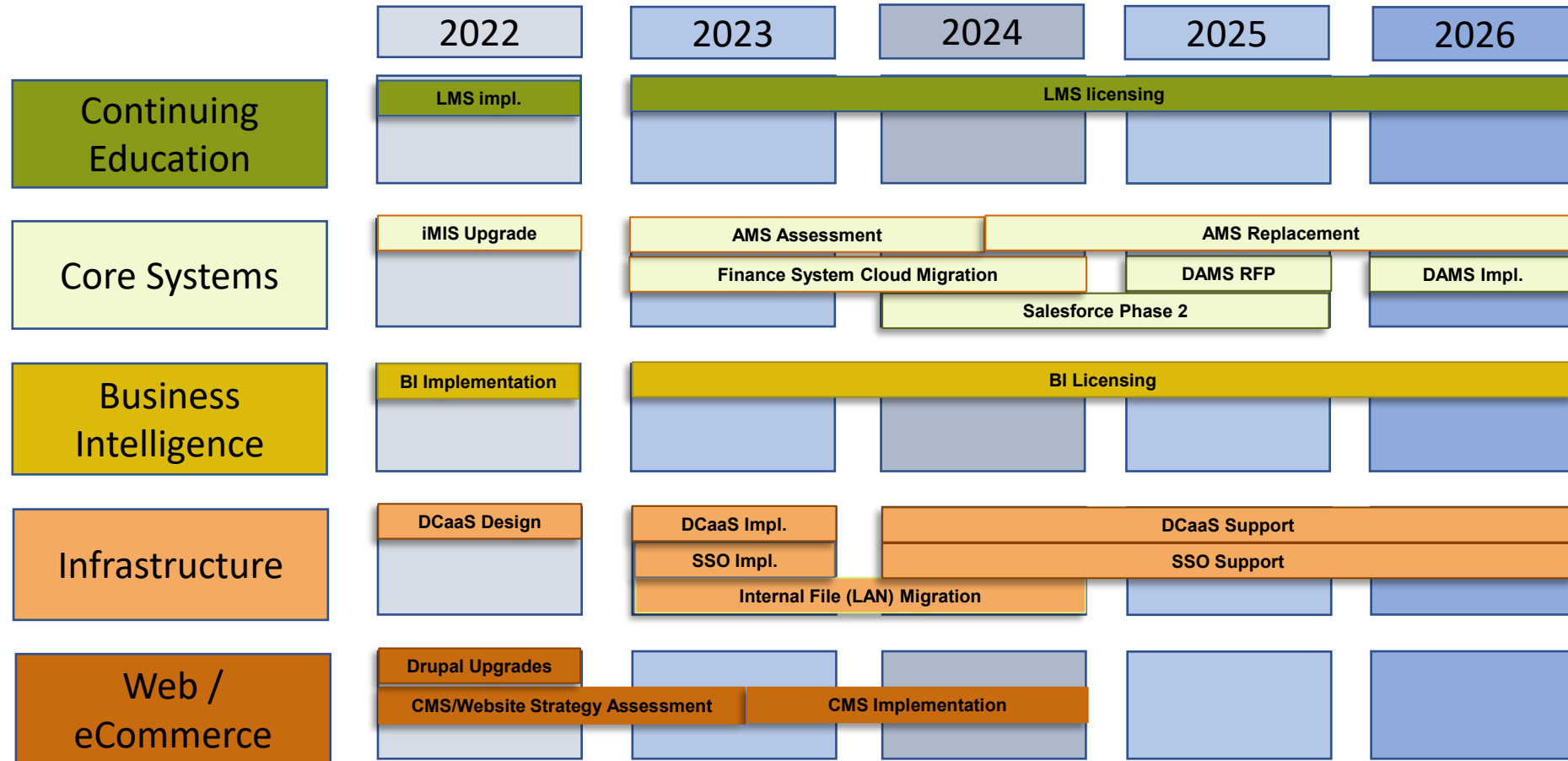
*FY22-FY26 Roadmap and projects listed on next slides*

# FY22 Overview of Proposed Project Costs

- Learning Management/eCommerce System - \$50,000 (operating)+\$150,000 (capital)
- iMIS Upgrade - \$50,000 (operating)
- Data Center as a Service (DCaaS) Design - \$63,000 (operating)
- Drupal/PHP/Linux System Upgrades - \$100,000 (capital)
- Business Intelligence Software - \$25,000 (operating)
- Web Content Management/Web Strategy Assessment - \$20,000 (operating)

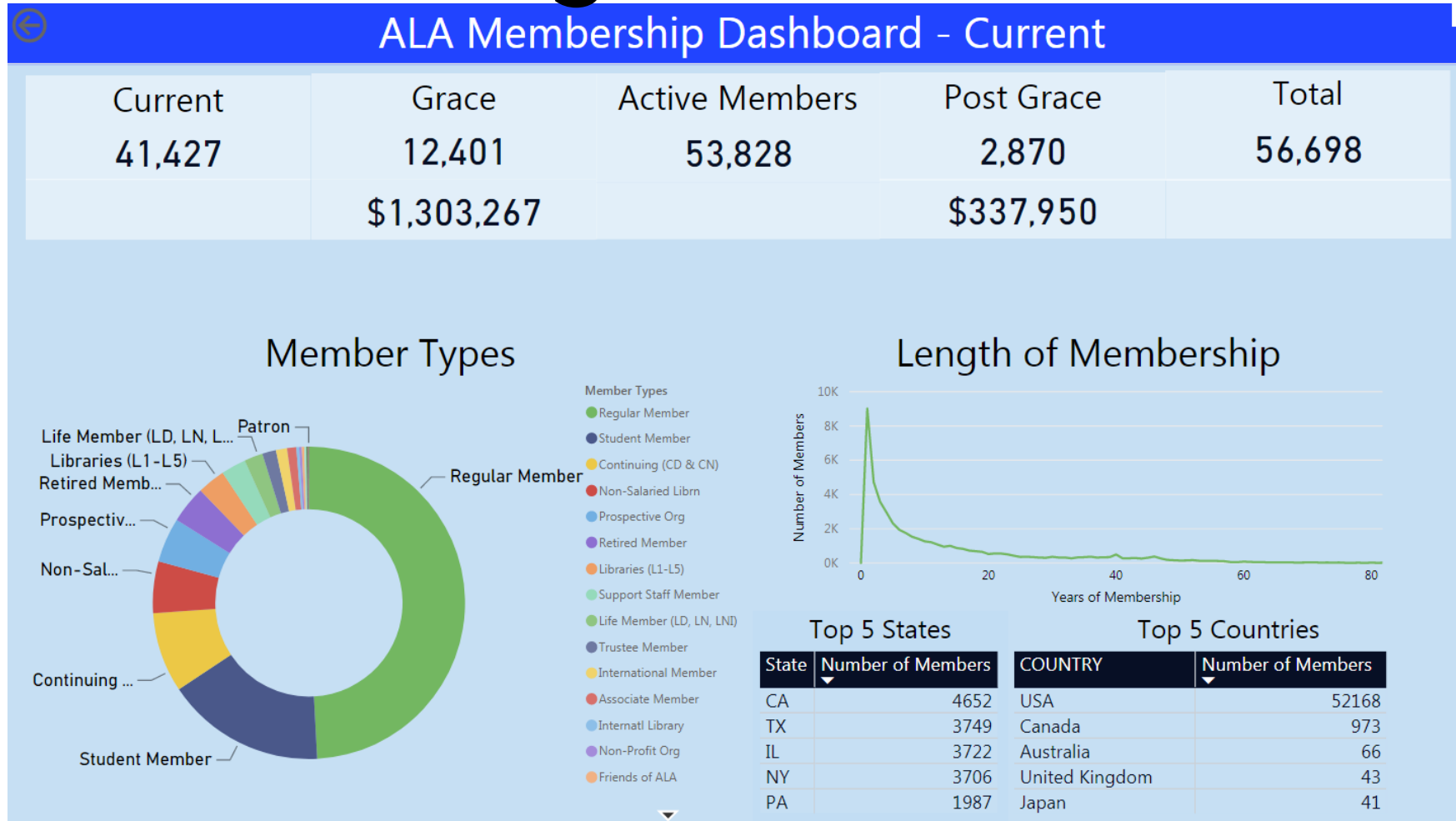


# ALA Technology Roadmap FY22-FY26





# Example of an ALA Business Intelligence Dashboard



# FY23-FY26 Summary of Projects

- The priorities for FY2023-2026 include the possibility of: replacing the AMS iMIS solution, moving the ~140 virtual server co-location facility infrastructure to the cloud, replacing our Drupal website technology, replacing our single Sign-On software, and the investigation and implementation of a new Digital Asset Management System (DAMS).

The descriptions, benefits, and metrics can be found in the Technology Investment Plan spreadsheet.

# Proposed resources needed to implement the above solutions:

- AMS Administrator (FTE)
- Systems Software Engineer (FTE)
- System Integration Specialist (FTE or Contractor)
- Business Analyst (FTE or Contractor)

Our current IT staff is focused on keeping operations going and project execution as time allows based on priority. This has resulted in very slow response times on projects. Many deadlines are being missed on almost every project implementation. Replacing outdated technology will require investment, time, and additional resources.

# https on ala.org Main Websites Update

- IT has made steady progress towards turning https (SSL) on at the [ala.org](https://ala.org) main websites. Resources needed to support the day-to-day operations, lack of availability of maintenance windows (due to events in the association), and other IT initiatives have delayed this work.

## Current Status:

- https (SSL) works when activated on the shared [ala.org](https://ala.org) main website servers but the login to the website does not function properly. IT has engaged the Shibboleth consultants to assist in resolving this. IT is in the process of getting an estimate to complete this work.



# Thank you!

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

### Detail 5 Year Investment Plan

Item/Description	Category	2022	2023	2024	2025	2026	Benefits	Metrics
<b>LMS License</b> - This licensing provides user access to the LMS above.	Operating	50,000	50,000	50,000	50,000	50,000	Enhance delivery and variety of learning options. Provides user friendly customer integration such as tracking courses and payment options.  Increase learning revenue by approx 1-3% annually.	Enhance customer experience understood by conducting surveys, greater use of webinars and courses provided by ALA.
<b>LMS (Learning Management Software) Implementation</b> - This software will provide a standard way to delivery and track eLearning throughout organization.	Capital	150,000					Enhance delivery and variety of learning options. Provides user friendly customer integration such as tracking courses and payment options.  Increase learning revenue by approx 1-3% annually.	Enhance customer experience understood by conducting surveys, greater use of webinars and courses provided by ALA.
<b>Business Intelligence Software Implementation</b> - This is software that will enable all units to make better decisions on real-time data.	Capital	25,000	25,000	25,000	25,000	25,000	Provides the ability to collect data from multiple systems into a central location and extract comprehensive and interactive reports.  Reduce labor cost by approx 1% annually (assume 50 users). Increase potential revenue by creating data products.	Creation of required number of standard reports, reduction of time to create reports and dashboards
<b>IMIS Upgrade</b> - This upgrade will allow for a browser based interface and additional reporting with dashboards.	Operating	50,000					New features include more functions and integrations, better user experience design, and cloud-based access, storage and pricing.	
<b>Data Center as a Service (DCaaS) Design</b> - This project is to allow us to hire a consultant to do the design portion of the DCaaS implementation below.	Operating	63,000					Reduces the likelihood of network and server outages, allows us to host our servers and network infrastructure offsite instead of paying for and maintaining our own, gives us 24/7/365 support without requiring costly overtime charges from consultants, frees up IT staff time for projects, allows staff to access the datacenter, view their dashboards, and run reports from anywhere at any time.	Reduction in server maintenance and support costs. Increase uptime of major systems.
<b>Drupal/PHP/Linux OS Upgrades</b> - Updates to eCommerce systems and ala.org	Capital	100,000					Our current systems will become unsupported at the end of Calendar year 2021. To maintain functionality and supportable systems.  A better website user experience for members and the public.	
<b>Content Management System (CMS) Assessment to Replace ala.org Drupal</b> - Creates the opportunity to organize content by topic with a focus on our external audience instead of organizing content by ALA's internal structure.	Operating	20,000						Increased usage of the website.
<b>Internal File (LAN) migration</b> - This migration changes the technology requirements for remote access software and allows for greater collaboration between staff and ALA locations and offsite or travelling staff members.	Operating		30,000	30,000	30,000	30,000	Increases and simplifies information sharing between staff and members, reduces our need for remote access software, allows for greater collaboration between staff at remote ALA locations and staff at ALA HQ in Chicago.  Reduces labor cost by approx 5% annually (assume 240 staff)	Increases staff collaboration on productivity, budget savings on remote access software,
<b>IMIS Assessment</b> - This assessment is needed to see if our IMIS Membership System still meets our requirements.	Operating		40,000				Work with Consultant to do assessment of AMS (Association Management Systems) to determine the best solution long term for ALA.	AMS selection process and scorecard.
<b>Financial System cloud migration</b> - This migration changes the technology requirements for remote access software.	Operating		50,000	50,000	36,000	36,000	Upgrades taken care of by the cloud vendor. Reduces our need for remote access software.  Reduces labor cost by approx .5% in Finance annually.	Increased efficiencies in accessing the Finance system
<b>Single Sign-On (SSO) Implementation</b> - A different SSO system will allow users to stay logged in longer which means personalized templates and content are immediately visible when members return to ALA Connect, online courses in a new LMS, conference schedulers, and other ALA sites	Capital		100,000				Allows users to have personalized templates and content which are immediately visible when members return to ALA Connect, reduces time spent re-entering data in forms and content on sites if the authentication times out.  Reduce labor cost by approx 1% annually (assume 240 staff).	Reduction in abandoned sites, increased customer and staff satisfaction thru surveys
<b>DCaaS Implementation</b> - This implementation allows us to host our servers and network infrastructure offsite at a physical data center using the resources of the DCaaS provider instead of paying for and maintaining our own. It allows IT staff to focus on data analysis, project implementation, improving services, and increasing efficiency rather than maintaining software and hardware. It will improve security of our members' data and shifts liability to the hosting center	Capital		200,000				Staff productivity increases, reduces the likelihood of network and server outages, allows us to host our servers and network infrastructure offsite instead of paying for and maintaining our own, reduces on-premise space, electric, physical security, and cooling requirements, gives us 24/7/365 support without requiring costly overtime charges from consultants, frees up ITTS staff time to work on projects, allows staff to access the datacenter, view their dashboards, and run reports from anywhere at any time.  Reduces labor costs by approx 3% annually (assume 240 staff) Reduces consultant budget by approx 2% annually (Managed Service Providers)	

### Detail 5 Year Investment Plan

Item/Description	Category	2022	2023	2024	2025	2026	Benefits	Metrics
<b>DCaaS Support</b> - These monies are needed for support.			300,000	715,000	715,000	715,000		
<b>CRM Salesforce Phase II Implementation &amp; iMIS Integration-</b> Phase II will add additional tracking for Advocacy, Development, and look at other areas to benefit from the software.	Capital			63,633	63,633	63,633	Enhanced ability to mobilize members on Advocacy issues. Reduces member touch points for Fundraising. Improves the ability to track relationships for Advocacy and Fundraising initiatives.  Increase fund raising revenue by approx 2% annually.	Increased participation on Advocacy issues, Increase in donations, Reduced time to get information out on advocacy issues.
<b>Possible iMIS Replacement</b> - Either begin the work to migrate to a new AMS or implement all necessary modules to make iMIS work the way we need it to.	Operating			250,000	300,000	750,000	New features include more functions and integrations, better user experience design, and cloud-based access, storage and pricing.  Reduces labor cost by approx 1% annually (Assume 145 staff)	Monitor cloud storage reduction, Staff surveys on satisfaction of system.
<b>CMS Implementation</b> - See above.	Operating			250,000				
<b>Investigate and implement a Digital Asset Management Service (DAMS)</b> A DAMS provide a collaborative environment so that ALA's media library can be shared with members and others to coordinate advocacy campaigns and calls-to-action. It allows staff to easily locate and repurpose digital assets. It makes ALA's branding and advocacy messages more consistent and unified in appearance.	Capital				100,000	100,000	Provides a collaborative environment so that ALA's media library can be shared with members and others to coordinate advocacy campaigns and calls-to-action, allows staff to easily locate and repurpose digital assets, embeds digital rights, copyright, and contact information on every image or file, supports compliance with copyright information and licensing terms.  Reduces labor cost by approx 1% annually (assume 240 staff) Potentially reduces legal fees for compliance violations	Increased Call to Action participation, maintain digital asset footprint, meet compliance audit standards
<b>Operating Total</b>		<b>183,000</b>	<b>170,000</b>	<b>630,000</b>	<b>416,000</b>	<b>866,000</b>		
<b>Capital Total</b>		<b>275,000</b>	<b>325,000</b>	<b>88,633</b>	<b>188,633</b>	<b>188,633</b>		
<b>Grand Total</b>		<b>458,000</b>	<b>495,000</b>	<b>718,633</b>	<b>604,633</b>	<b>1,054,633</b>		

<b>Total</b>
<b>Capital &amp; Operating</b>
<b>FY2021-FY2025</b>
<b>2,276,266</b>



## 2022 Capital Budget

### Fiscal Year 2021 Capital Requests

	IT:	(\$) Cost Life (Years)		(\$) Depreciation to FY22 operating Budget	
CEA#1	Learning Management System Software Implementation	150,000	5	15,000	
CEA#2	Drupal/PHP/Linux OS Upgrades	100,000	5	10,000	
CEA#3	Managed Services and PC Services	225,447	5	22,545	
CEA#5	Business Intelligence Software Implementation	50,000	5	5,000	
CEA#6	Security Audit Remediation	70,000	5	7,000	
CEA#7	Tape Attrition	1,000	5	100	
		<u>\$ 596,447</u>		<u>\$ 59,645</u>	
<b>Fiscal Year 2022 Totals</b>		<u>\$ 596,447</u>		<u>\$ 59,645</u>	

Note:

# ALA BARC/F&A FY19-FY26 Investment Update

Date 1/7/2021

## Investment Area: IT

### FY22-FY26 Strategic and Operational Priorities and Investments

*What are your strategic and operational priorities in light of the five years' (FY22-FY26)? **Purchase and Implement a new Learning Management System; Perform an iMIS Membership Association Management System Upgrade; Perform Data Center as a Service (DCaaS) Design; Perform Drupal/PHP/Linux System Upgrades; Purchase and Implement Business Intelligence Software; Perform Web Content Management Solution/Web Strategy Assessment***

**Original FY19 – FY25 – Total Investment Budget - \$6,617,764**

**Requested Investment Budget:**

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

*\$764,713 FY20 Operating + Capital (additional positions, UX Manager investment and DBA replacement).*

*\$312,447 FY21 operating + capital*

**Current FY19 – FY26 – Total Investment Budget - \$4,603,280**

**Requested Investment Budget:**

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

*\$654,069 FY20 operating + capital (additional positions, UX Manager investment and DBA replacement).*

*\$312,447 FY21 operating +capital*

*\$2,276,266 FY22-FY26 operating + capital **Savings \$2,014,484 (achieved from reductions in investment costs and moving investments to future years).***

**FY20 Revised Total Estimated Move Budget: \$672,144 (separate budget from building sale)**

**Actual Spent: \$410,670.73**

### **FY20 IT Budget**

As of April 2020, the YTD Actual was \$2,453,587 and IT expenses were 1% or \$34,792 over budget. In April 2020, we were asked to reduce expenses to cover the increased depreciation expense needed to amortize the capital overages for 2018 and 2019. We identified savings in IT of \$159,850 which included savings of \$18,750 in managed services, \$50,000 in delay of moving the financial system to the cloud, \$9,000 by not adding Salesforce additional licenses, \$65,100 in Office 365 charity pricing discounts, \$15,000 in delay of enhancements to enterprise search, and \$2,000 in Data Center as a Service design consulting.

### **FY21 IT Budget**

For FY21 we were asked to reduce operating and capital expenses by 5% or \$187,682. In addition, the CIO IT investment position, Director of Infrastructure, User Experience Manager, and the Internet Administrator positions were not filled due to the hiring freeze. This resulted in the IT salaries budget being reduced by \$527,303 to \$3,162,709.

### **FY22 – FY26 IT Investment Priorities**

*What are your top initiatives that your department plans to undertake in light of those priorities? What outcomes constitute success?*

**Purchase and implement a new Learning Management System** – Increased efficiencies in delivery methods and tracking abilities for members, customers, and staff.

**Perform an iMIS Membership Association Management System Upgrade** - New features include more functions and integrations, better user experience design, and cloud-based access.

**Perform Data Center as a Service (DCAas) Design** - Reduction in server maintenance and support costs. Increase uptime of major systems.

**Drupal/PHP/Linux System Upgrades** – Our current systems will become unsupported at the end of Calendar year 2021. To maintain functionality and supportable systems.

**Purchase Business Intelligence Software and Implement** - Creation of dashboards to make data-driven decisions. Reduce time to create reports and dashboards.

**Perform Web Content Management Solution/Web Strategy Assessment** - Creates the opportunity to organize content by topic with a focus on our external audience instead of organizing content by ALA's internal structure. Provides a better website user experience for members and the public.

### **Key Assumptions/Risks/Opportunities**

*What assumptions are inherent in your plan? What risks are you watching in light of those assumptions? What additional opportunities do you anticipate may appear that may impact your plan?*

The ALA financial constraints have impacted the IT investment budget. We have prioritized investment projects assuming the current reduced budget. Further budget reductions may result in deferred implementation of some parts of the plan. Also, ALA's pivot strategy will impact IT priorities.

Adding additional FTEs and contractor resources are necessary to implement the plan. Our current IT staff is focused on keeping operations going and project execution as time allows based on priorities. This has resulted in very slow response times on projects. Many deadlines are being missed on almost every project implementation. Replacing outdated technology will require investment, time, and additional resources.