

**TO:** ALA Executive Board

**RE:** Information Technology Report

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

**ACTION REQUESTED BY:**  
None

**CONTACT PERSON:**  
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**DRAFT OF MOTION:**  
None

**DATE:** March 24, 2021

**BACKGROUND:**  
FY2021 and FY2022 Report on IT Resources and Major IT Goals

**ATTACHMENTS:**  
None

## **FY2021 and FY2022 Report on IT Resources and Major IT Goals**

March 24, 2021

### **IT Resources:**

Our current IT staff of seven is focused on keeping operations going and project execution as time allows based on priority. Given the resource constraints, the IT department is struggling to decrease our technology debt. Replacing outdated technology will require investment, time, and additional resources. To address this, IT has requested additional investment dollars in FY2022 to hire a Chief Technology Officer and to fund project work to reduce the technology debt. IT is also currently searching for a Systems Software Engineer to support project execution. These resources are needed in order to meet the association's major goals for FY2021/FY2022 outlined below.

### **Major FY2021 IT Goals**

#### **Goal 1: Upgrading Shibboleth (Single Sign-On software) to the latest version**

Description: Upgrade Shibboleth Single Sign-On software to latest version

#### Deliverables:

- Remove blocker on turning https on the main ala.org website servers
- Work with Continuing Education vendor to add Single Sign-on
- Work with the Election vendor to add Single Sign-on
- Work with Booklist vendor to add Single Sign-on
- Remove a blocker from the iMIS upgrade project

#### Status:

The eCommerce websites are already https. In order for the two main ala.org websites to be configured for https we need work to be performed by Shibboleth consultants.

Our Shibboleth consultants recommended we upgrade to the latest version of Shibboleth before turning on https on the two main ala.org websites. In order to do the upgrade, the consultants need to write a custom login module to work with the iMIS membership database. This new login module is necessary so that members and customers won't have to reenter known profile data in our various website systems. The new login module will also provide member discounts in our various ecommerce website systems and determine membership access to some of our website systems like ALA Connect. The consultants chatted with the Shibboleth founder for alternatives to creating a new login module but found no other options available.

This upgrade affects many systems and member touch points since it impacts the single sign-on logins. The single logins pull iMIS membership profile data into the applications for fourteen websites including the membership dues ecommerce website, donation ecommerce website, eStore ecommerce website, Compusystems ecommerce registration websites, Experient ecommerce registration website, JobLIST ecommerce website, two main ala.org websites, ALA Connect website, conference abstracts website, online journals websites, Digitell recordings website, ALA OCLC website, ALA institutional archives repository website, and almost as many development server test websites. All these sites must be tested with the new version of Shibboleth prior to going live in our production environment and turning https on.

The current estimate for completion of this upgrade is end of May 2021. We are actively recruiting for a staff position to support Shibboleth going forward. Our progress has also been affected by October, December, and March furloughs and spring vacation schedules with staff and consultants.

## **Goal 2: Install https on the main ala.org website servers**

Description: Turn on https on the two main ala.org websites

Deliverables:

- Implement new caching software to support https
- Configure and test

Status:

This goal is dependent on the Shibboleth upgrade in Goal 1 above.

## **Goal 3: Monitor revenue and membership goals**

Description: Build dashboards to monitor the two major Association-wide goals in the Pivot Plan and associated key performance indicators.

Deliverables:

- Identify baseline dates and numbers
- Create dashboards to be able to monitor progress

Status:

A number of Business Intelligence data dashboards have been defined and developed working with the Membership department in Power BI. The next step is to define and develop more dashboards to be rolled out across the association to monitor unit specific goals as well as those articulated by the Pivot strategy. Data dashboards will help units track trends and modify strategies in real time to improve revenue. This project will be completed by the end of the fiscal year.

## **Goal 4: Assist with the new Continuing Education (CE) Learning Management/eCommerce System Implementations**

Description: Implement and integrate a new CE Learning Management/eCommerce System in conjunction with a cross-functional team.

Deliverables:

- Assist with the selection of a new system
- Assist with the implementation
- Set up and test integrations
- Provide training

Status:

A vendor has been selected. This project will be rolled out in June 2021.

## **Goal 5: Implement the eStore/eCommerce integration to the new fulfillment vendor**

Description: Work with the new fulfillment vendor to set up the integration to the eStore/eCommerce System

Deliverables:

- Fulfillment vendor is able to process orders from the eStore/eCommerce system

Status:

A vendor has been selected and the contract is being negotiated. This project will be rolled out in May/June 2021.

## **Goal 6: Update Technology to Advance Membership Communications**

Description: Improve Membership communications by updating the technology

Deliverables:

- Complete Blogs Migration to the Cloud
- Complete the Sympa Migration to ALA Connect
- Complete Informz (Marketing Automation Service) email marketing account merger

Status:

These project deliverables are currently underway. The projects are scheduled to be completed in the summer/fall of 2021.

## **Major FY2022 IT Goals**

### **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 (cloudbased). Due to its size and complexity, replacing the AMS is a multi-year project requiring an assessment, RFP, vendor selection, and implementation.

### **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

**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

**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

**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.

**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 2021, 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.