

Technology Review Advisory Group Final Report
Executive Summary with Update from SLA
June 2006

Background

In the fall of 2005, SLA Toronto brought a recommendation to the Board of Directors asking for an investigation into the technology needs of units. The Board of Directors deferred the matter to the Cabinets. Brent Mai, Division Cabinet Chair and Patricia Cia, Chapter Cabinet Chair created the Technology Review Advisory Group, with members representing both chapters and divisions, to investigate. The full report came to the Chapter and Division Cabinet Chairs and to SLA Headquarters on May 18th. Daniel Lee, Chair Technology Review Advisory Group presented the report to a Joint (Chapter and Division) Cabinet meeting in Baltimore on June 13, 2006.

In the few weeks between receiving the report and leaving for Baltimore, SLA Staff took the time to review the full document submitted by the Technology Review Advisory Group. Staff realized that they had already been addressing some issues and also that some of the perceptions of the survey respondents did not reflect current practices. SLA submitted an update on technology improvements under way and clarified some of the misperceptions arising for the Advisory Group report.

The attached document includes the Technology Review Advisory Group summary and the supplementary report from SLA Staff. The full document is available on the Chapter and Division Cabinet Communities of Practice (not for general distribution).

If you have any questions concerning the Technology Review Advisory Group report, please contact one of the following:

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Nancy Sansalone, *SLA Chief Operating Officer/ CFO*

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Thank you,

Patricia Cia, *Chapter Cabinet Chair (2005/06)*

Brent Mai, *Division Cabinet Chair (2005/06)*

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Technology Review Advisory Group Report of findings

Executive Summary

TO: Chapter Cabinet, Division Cabinet
FROM: Technology Review Advisory Group
RE: Report of findings
DATE: May 11, 2006

Background

In the fall of 2005, SLA Toronto brought a recommendation to the Board of Directors asking for an investigation into the technology needs of units. The Board of Directors deferred the matter to the Cabinets. Brent Mai, Division Cabinet Chair and Patricia Cia, Chapter Cabinet Chair created the Technology Review Advisory Group, with members representing both chapters and divisions, to investigate. This report presents the findings of the investigation.

Conclusions

1. The provision of membership data to the units requires significant improvement. 90% of Membership Chairs who responded were **dissatisfied** with SLA's provision of membership data. It is important that the new membership system being considered contains a number of core features that are not currently provided. A new system is not enough, however, without improved processes to provide membership data changes in a timely fashion to unit leaders so they can take timely action.
2. Communications to unit leadership about new technology tools have not been effective. The availability of several existing tools (e.g. conference calling accounts, CoP and blog software) was unknown to many survey respondents.
3. The focus of new technology provided to units recently has been on tools for asynchronous communication among members (e.g. CoP and blog software). What is actually most needed at this time to support units are other types of tools:
 - tools that ease and enable actual collaborative work among unit leaders, committees and task forces;
 - improved administrative functionality, to reduce the time and effort volunteers need to spend to do SLA work, e.g. improved conference planner tool, event scheduling, and online payment;
 - Improved security and access to improved tools for managing unit websites;

Short Term Recommendations

1. Establish a permanent Technology Advisory committee, reporting to the Board of Directors. (p. 11)
2. Review the communications procedures and broaden channels used by SLA staff to promote technologies available to units. (p. 11)
3. As the decision for a new Association Membership System (AMS) is made, consult with the SLA Technology Review Advisory Group. (p. 12)

4. SLA's Association Membership System (AMS) should, at a minimum include a number of features not currently included in the system. (p. 12)
5. Task a staff member at SLA Headquarters (with the assistance of the proposed ongoing Committee in recommendation 1) to develop an IT Strategic Plan for SLA. This plan would serve as a valuable planning tool for decision-making as well as facilitating dialogue between the leadership, members at-large, and Headquarters. (p. 13)
6. Allow for more than one person to access the web server via FTP. The current model of distributing one username and password to the unit webmaster creates a narrowly controlled, "gatekeeper" environment which is inefficient and not easily managed. (p. 13)
7. Solicit and/or compile recommendations from other Task Forces that directly relate to technology. (p. 13)
8. Permanently expand the Leadership Discussion List to include all elected members of each unit. (p. 13)
9. Provide a list of available tools and expected deadlines to any Association-level task force. (p. 13)

Long Term Recommendations

1. Create a task force to investigate SLA's current model for publishing web content by the units. (p. 14)
2. Investigate expanded reporting options for conference planners and unit leadership. (p. 14)
3. Many volunteers feel it is a burden to rely on home or work computers to conduct SLA business, including software installation and software upgrades. This is especially important for volunteers who work in "restricted" environments. SLA should investigate possible solutions to this issue, such as web-based or thin-client software. (p. 14)
4. Negotiate licenses (to which seats could be added through SLA at unit expense if desired) for popular desktop software tools in addition to Quicken (e.g. Dreamweaver and Adobe Acrobat.) (p. 14)
5. Strive to provide a seemingly seamless technology experience for members. (p. 15)
6. Use Click University as a platform for volunteer education to improve technology skills and awareness. (p. 15)
7. Provide volunteers with web-based collaborative workspaces. (p. 15)

Financial Impact Statement

The cost of running the Technology Advisory committee proposed would be minimal and would likely be similar to the cost of running other committees.

Submitted by:

Daniel Lee (Chair), Beth Brown, Stacey Greenwell, Janice Keeler, David Whelan

Updated Information to Supplement Report of Findings

TO: SLA Technology Review Advisory Group
FROM: Nancy A. Sansalone, COO
DATE: 6 June 2006
RE: Updated information to supplement Report of Findings

The Technology Review Advisory Group conducted an assessment of SLA's technology-related services from SLA, and will be reporting on their findings to the SLA Chapter and Division Cabinets in Baltimore. While many of their concerns and suggestions are continually being addressed by SLA Headquarters, their assessment was extremely productive and will serve as a guide for future action.

Here is a summary and update on some of the key areas discussed in the report:

Association Management System

SLA membership and prospect management, financial tracking, and other association services are handled via a special software application. The current system, however, is aging and lacks many capabilities that would give volunteers and staff the freedom and flexibility to transform member services, programs, and events. Historically, we at headquarters and volunteer leaders in chapters and divisions have been limited in our abilities due to the current system we are using. That will change in the next year or so, as we are closing in on acquisition of a new system that will focus on your needs, those of your volunteer leaders, and those of your staff. The AMS application is specifically being chosen based on the functionality it will give unit leaders and staff. It meets all of the concerns noted in the report's Membership System section. It will be a 'thin client' and units will have the capability to run reports, schedule events, assign tasks, send communications via email, track history and make notes, manage unit leadership, and much more.

SLA staff has been working hard over the past year to review proposals for a new association management system that meet these goals.

- During Q3-2005 extensive interviews were conducted with staff to determine the requisite functionality required to conduct SLA business for unit leadership and staff.
- During Q4-2005, staff prioritized the recommendations that were received from Information Technology Advisory Group (ITAG). ITAG developed the recommendations into a RFP and AMS user specification document. The RFP went out to companies that fit our goals for a new AMS
- In Q1-2006, staff met with ITAG representatives to evaluate all proposals received from vendors and moved into the demonstration process. Six vendors, each offering a different application, were interviewed.
- During Q2-2006, staff, in conjunction with our technology consultants, ITAG, conducted on-site visits with two finalist vendors and also visited with two vendor clients.
- In Q3-2006, the staff acquisition team, after consultation with the Technology Review Advisory Group, will make a final selection on an AMS vendor and begin the design phase of the project. Staff will conduct an extensive reference check on both vendors looking at functionality, problems, customer service satisfaction, billing, and customer

relations. Staff are waiting on a second proposal with the additional features we'd like to see and the new costs associated with them. We will also ask for future year costs and recurring costs associated with the new products (this will include hosting v not-hosting, licenses, tool boxes, report writing extras, and upgrades to name a few) to insure costs are covered in future years' budgets to be approved by the Board.

As a side note, the Board of Directors has previously approved the expenditure of USD 450,000 for the purpose of acquisition of a new association management system.

Technology-Based Services

SLA has purchased new servers and upgraded the mail and web servers for better service to members.

A website redesign will be launched at SLA 2006. HQ completed work on a graphic "facelift" for the SLA Website, and launched a series of technical enhancements to the site that will boost member and visitor interaction and functionality (including RSS feeds).

New blogs are being introduced based on unit requests. The CEO's blog will be introduced at SLA 2006.

Staff are working on a Wiki that will focus on the SLA competencies.

In Summary

The concerns and suggestions presented in the Technology Review Advisory Group report address many functions or services offered through HQ. Staff learned that communication or type of communication seems to be at issue. HQ will work with the leaders and members to improve communications and type of communication with the unit leadership to insure all volunteer leaders are aware of the services, programs, venues, and directions/instructions offered through HQ.

Some of the more common services or programs SLA HQ offers to unit leaders to complete their work and communicate with their constituencies include:

- Blogs – communication tool
- CoP – communication and reference tool
- PayPal – online payment tool
- Quicken – accounting software
- Discussion lists – hosted by HQ
- Web site hosting – by HQ
- Web calendar – communication tool
- Webtrends software – by HQ
- E-Bulleting distribution – to distribute newsletters
- Click U. – programming through Click U Live! or course libraries
- Online training for unit leaders – for instructions and polices and procedures
- Leadership Knowledge Center – for training and resources
- Online conference planner – to design individual schedules for annual conference
- Survey Monkey – survey tool
- E-voting – to conduct online voting
- Online Membership Directory – for members to update their membership profile

- Podcasts and Wiki's will be introduced at SLA 2006.

Technological enhancements and new systems are needed to ease the burden for volunteer leaders. There is a huge human and financial cost to SLA to purchase or enhance systems and HQ must seek approval from the SLA Board before making such purchases. In 2005 October, the SLA Board of Directors approved a 2006 budget with increased funding for technology, including a senior IT position (Quan Logan hired 1 May), and the purchase of new servers and software applications for web, mail, and database management.

SLA staff look forward to working with the leaders and members to improve communications and seek out the most helpful and effective technology tools for SLA.

HQ appreciates the opportunity to give the Technology Review Advisory Group this brief update.