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BOARD DOCUMENT

TO: Board of Directors
FROM: Nancy A. Sansalone, COO and Quan Logan, IT Director
DATE: 10 January 2007
RE: Technology News and Updates

The Technology Review Advisory Group (TRAG) conducted an assessment of SLA's technology-related services and reported their findings to the SLA Chapter and Division Cabinets and the full Board of Directors at their June 2006 meetings. While many of their concerns and suggestions are continually being addressed by SLA Headquarters, their views were extremely productive and have served as a guide for further discussion, investigation, and action by the staff.

SLA strives to provide a seamless experience for its members and volunteer leaders. Staff continue to use the Leadership Center <http://www.sla.org/content/resources/index.cfm>, Leadership Connections (monthly "pushed" communiqué), the Communities of Practice, SLA Connections, and the leadership and governance discussion lists to communicate and promote current and new technologies, open dialogue between and among leaders, members, and staff, and to post policies, procedures, and deadlines.

Following is an update on some of the key areas specifically discussed in the TRAG report, and discussed by the Board of Directors, as well as new features being addressed in the CEO's Goals and Objectives in 2007.

1. Association Management System

TRAG recommendations: As the decision for a new AMS is made, consult with the SLA TRAG. SLA's AMS should, at a minimum include a number of features not currently included in the system. Investigate expanded reporting options for conference planners and unit leadership. SLA should investigate possible solutions (for software installation and upgrades) such as web-based or thin-client software.

Staff efforts: In late 2005, SLA began a search for a new AMS package, one that is user friendly, is fully supported, encompasses the Association's business practices—and which would allow Units access to and use of specific data. In July 2006, staff set up a WebEx application to share the finalist products with the Technology Review Advisory Group; we received no feedback.

We have selected a product and the application is called ClearVantage developed by Euclid Technologies. Euclid Technologies is presenting an overview of the application and how it relates to the Units and, along with staff, conducting a focus group during the Leadership Summit in January. Design begins 1 February 2007 and will proceed at an aggressive pace in the hopes of launching implementation after Annual Conference, and going live for the public in August.

Financial Considerations: The Board of Directors has previously approved the expenditure of USD 450,000 for the purpose of acquisition of a new association management system.

2. Collaboration Tools

TRAG recommendations: Negotiate licenses for popular desktop software tools in addition to Quicken. Provide volunteers with web-based collaborative workspaces.

Staff efforts: Volunteer leaders and TARG requested online tools that ease and enable collaborative work among unit leaders, committees, and task forces. To meet this goal, SLA has signed a comprehensive agreement with WebEx to support multiple collaboration tools for administrative purposes and for membership usage. These services will be introduced in early 2007.

Virtual Meetings – The Web Meetings account is designed for conference calls and/or web interface. We are in the process of gathering input from staff and members at which point we will create a custom collaboration site or extend the capabilities of the CoP. In mid-December, HQ staff were trained on the Meetings application and are experimenting with its capabilities. We are investigating how to leverage this service to other Association activities and developing a plan to extend the service to our Units.

Web Training Center - The Training Center allows SLA to deliver engaging training classes over the Web to anyone, anywhere. The Training Center will give us the ability to provide interactive training to Association entities and members globally. This may be especially useful in training our Units on the new AMS when it goes live.

Event Center - The Event Center gives SLA the ability to stage powerful online events to anyone, anywhere—for any purpose. This will allow the Association the ability to hold webinars, all-hands meetings, press events, or impromptu Board meetings, extending our reach internally and externally.

Sales Center - The Sales Center allows the Association to create dynamic sales presentations and demos to prospects anywhere in real time. The Sales Center will allow us the ability to quickly qualify leads, manage prospects, negotiate contracts, and shorten sales cycles, improve forecasting, and leverage team selling.

Web Support Center – The Support Center allows our IT Director, Quan Logan the ability to diagnose and solve technical support problems remotely. The Support Center will allow him the ability to quickly increase first call resolution of technical issues of our members.

Financial Considerations: Bulk rate pricing with the WebEx contract. We are investigating a scheduling and billing plan for Unit usage.

3. Social Networking Software

President-Elect Abram suggested at the June 2006 Board Strategy Meeting that SLA provide a MySpace-type portal for our membership. Networks can build brand loyalty, strengthen our organization, enhance our site's offerings, drive traffic, and can be an important source of revenue as well. Staff are currently investigating Social Networking Software.

Financial Considerations: To be determined.

4. Web Site

A Web site redesign was launched at SLA 2006. Staff completed work on a graphic “facelift” for the SLA Web site after extensive research with similar organizations, members, and

experts, and launched a series of technical enhancements to the site to boost member and visitor interaction and functionality.

An RSS feed was recently introduced in collaboration with Newsgator, and staff successfully launched the "SLA Feed Reader" to members. As part of the Web redesign, we created a blog RSS feed box that shows the most up-to-date strings of entry for the three blogs listed in the box. This feature is available on each page of the SLA site.

Created News Connections Section of Web site and update it daily.

The Association is in the planning stage of redesigning the *Information Outlook* Online section of the Web site so that it is in HTML format rather than PDF format. The PDF's are provided by the company eBrary, however, members are not able to use the SLA search engine to find information in various articles.

Financial Considerations: \$1,800 for web development time for the IO Online work.

5. Discussion Lists

TRAG recommendation: Permanently expand the Leadership discussion list to include all elected members of each unit.

Staff efforts: Staff created a Governance Discussion list open to all members as the forum for discussing issues related to volunteer leadership.

In December, our previous vendor informed us that it would no longer be supporting Lyris 4.0. We upgraded our level of service to version 9.1 and enhanced features for our discussion lists. The new version will give us faster delivery, greater flexibility, searchable archiving ability, and other enhanced services that members will learn about in the coming months.

6. Click University

TRAG recommendation: Use click U as a platform for volunteer education to improve technology skills and awareness.

Staff efforts: SLA members have access to a growing resource for online learning in Click University – the only online campus created for practicing information professionals, an exclusive benefit of membership.

Last month, we launched the Click University Competitive Intelligence Certificates Program. This marks a key point in the growth of Click U., as our programming has mostly served "need to know now" kinds of programming through Click U. Live! monthly events. The CI Certificates Program was designed by experts in the field and is shaped for info pros who want to stretch their abilities into a key strategic area of practice for most organizations.

SLA has just been recognized as an Authorized Provider by the International Association for Continuing Education and Training. IACET's Criteria and Guidelines, created in 1968, are at the core of thousands of educational programs worldwide. IACET approval is the standard learners seek for quality. That means members can expect educational programming that is high in quality, focused, and structured for effective learning. SLA's Click U. can now award IACET Continuing Education Units for qualifying courses.

In February, Click U. Live! is introducing a new program: "Gary Price: Quarterly Updates." His presentations at Annual Conference are always standing room only and now Click U. will be hosting Gary Price every quarter, right at your workstation. He will cover new topics in searching and what's new on the Web.

Click University is opening its first professional library in partnership with eBrary. Available to SLA members at no cost, it contains 930 titles on leadership and management topics. SLA members will also enjoy deep discounts if they purchase content or subscriptions to eBrary services for their own organizations.

SLA has recently partnered with the University of Toronto's Professional Learning Centre. SLA members now enjoy an 11 percent discount on all Web-based distance learning offered through the University of Toronto's PLC. Courses are practical, interactive whenever possible, and cover topics ranging from information technologies to administration and management issues, client services, and personal development. Taught by recognized leaders in their field, PLC courses are delivered entirely over the Internet. Members can participate on their own time, at their own pace.

7. Blogs and Podcasts

Info-X is the blog established by SLA's CEO in June 2006. This blog includes text and podcast postings. It is attracting steady traffic and staff are exploring ways to increase the number of visitors.

Nearly 20 other blogs are hosted on SLA platforms. Additional units have requested (and received) information on establishing their blogs on SLA's platform, but these sites have not been established.

Additionally, staff has begun to experiment with podcasting and audio blogging. The CEO has posted a few audio blog messages to Info-X, and selected staff is providing updates on new services and offerings through an experimental SLA Podcast Center.

Financial Considerations: There are no financial expenses related to the SLA blogging and podcast efforts.

8. Wiki Collaboration

The Association is currently beta testing a wiki software package called Confluence, per member requests. A wiki is server software that allows users to freely create and edit Web page content using any Web browser. Wiki supports hyperlinks and has a simple text syntax for creating new pages and crosslinks between internal pages on the fly. We currently have a closed beta test and hope to have open testing as soon as possible. Our Wiki will answer member requests by offering simple, moderated, and streamlined Wiki access to our members allowing them the ability to access, collaborate on, and share content, knowledge and files anytime, anywhere.

Financial Considerations: USD 5,000 to cover the costs of the application.