MLA Information Technology Task Force: Initial report to the MLA Board
September 21-23, 2011, Boston, MA

Charge

Responsibility for MLA's information infrastructure is distributed among several different parts of the association: the Web editors, the Web Advisory Group, the Publications Committee, the business office, the Administrative Officer, and archives. The revision of the MLA web site was partially successful in the areas of visual design and organization but lacking in the area of web site functionality. The information infrastructure is not limited to the web site only, but rather the entire information needs of the association including database design, database management, and database integration of the wide variety of MLA's membership, financial, development, and administrative data. To this end a task force will be appointed to write a plan with short and long term goals within the context of the strategic plan for the development of MLA's information infrastructure. The task force will draw upon existing documents including the Web Editors' report and Board minutes (section VII.I) of February 2011. The charge to this task force is:

To study MLA's information infrastructure needs and to write a report to the Board of Directors articulating short and long term goals and outlining a step-by-step plan to address those needs with a proposed timetable for implementation for review by the MLA Board. The study should gather and synthesize suggestions and recommendations from all parts of the organization affected by MLA's information technology and investigate other organizations that have had successful relationships with web design firms (e.g., ARLIS). The study will examine both the technological needs (hardware and software) and the administrative structures needed to manage the infrastructure. A major section of the study will be the examination of the current content management system (Ektron) with a recommendation to either retain it or eventually migrate to another system that is both portable and scalable. The task force should propose a budget for information technology needs for 2011-2012 and 2012-2013.

Should the Board approve the recommendations of the study, the task force will be charged with writing a RFP for a web design firm with a proven record in writing code and a history of working with academic institutions, not-for-profits, and/or membership organizations for review at the fall Board meeting. Following approval of the RFP, the task force will gather and evaluate responses to it in time for review at the winter Board meeting in 2012 with the aim of issuing a contract at the beginning of FY 2012-2013.

Members
Michael Rogan, Chair
Jenny Colvin
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Pat Wall

Comment [MR1]: a recent survey of Tufts' peer institutions discovered a number are migrating off of Ektron: it is irksomely difficult and lacks needed flexibility

Comment [MR2]: probably not the RFP audience; different but equivalent solutions could come from: already developed environments (ALA Connect), identity management firms with add-on capability software familiarity, client-focused small business software firms (zoho, zimba), learning management systems (sakai, moodle). IMPORTANT: the direction chosen does not duplicate other initiatives in MLA – multiple solutions from one investment.

Summary of Process

The approach of the Task Force in tackling its complex, challenging, and multifaceted charge has been to first inquire of important groups within MLA about the information technology they are currently using, as well as technology they don't have but feel would help them accomplish their goals and objectives — whether that might be new technology, or improvements made to existing technology. We asked Committee Chairs [MLAComm-L], Chapter Officers [MLACC-L], the web editors, and the business office. Their responses have been compiled to create this draft of an Ideal Future State, which is circulating for comment and input from the groups above, as well as others (Roundtable Coordinators, Special Officers, etc.).

Concurrently, we have collected the contact information for some similar organizations that have relationships with web design firms to see what sort of information technology needs they have and how well those needs are being met.

After review and feedback by the MLA Board of Directors, the Task Force will use the draft and data compiled to write an RFP detailing short-term and longer-term IT development to submit for Board approval. We hope to bring proposals received to the Dallas Annual Meeting for discussion with the MLA Board.

Current Practices vs. Ideal Future State

Membership

Current Association member information is kept (primarily) in an SQL database hosted on a secure (SSL) server at a local (Wisconsin) ISP. Records contain: contact information, membership status and activity, and payment transaction history for membership and conference registration from 2008 forward. Beginning in June 2011, administrative functionality (data entry, editing, and reporting) is done through Access 2003 forms, queries, and reports, where Access (on desktop PCs) is dynamically linked to the SQL database.

Through a web-based interface, members can renew their membership, update their own profile, edit their own contact and billing information, identify their preferred address and choose whether to display home contact information to the public. However, the member's MLA Administrative Structure Activities must be updated by authorized staff at the MLA Business Office or by the MLA Administrative Officer. Financial records are not available.

[NB: The Administrative Structure is the comprehensive presentation of the government and working organization of the Music Library Association, and includes all officers, committees, their membership, subordinate bodies, other authorized groups, and external liaisons.]

Historical membership information and subscriber data has been maintained in a separate Access 2003 database, said to be largely redundant of data now maintained online.

However not all information is duplicated – areas such as subscriber data, deceased members, and historical activities are not online.

The SQL database has some limited capability to provide the current Administrative Structure from membership activity data. However, the field structure has not been kept up to date with the recent changes to MLA's committee structure, and content data (which must be manually edited by authorized staff) has also not been kept up to date.

The web-based interface to the MLA online directory also provides access for members to conference registration and MLA donation forms. Credit Card transactions at the site are managed by a 3rd-party provider, Authorize.net.

All bookkeeping transactions are recorded in QuickBooks — for the most part, manually. (Web-based transactions can be captured for export and batch importing into QuickBooks.) QuickBooks includes all income (dues, subscriptions, donations, list rentals, advertising, convention registrations, etc.), all expenses (including member reimbursements), all assets account activity (gains, losses, investments, withdrawals, transfers), and all liability account balances and activity. QuickBooks records are the official audited financial records of the Association.

Recommendations
- Consolidate access to all member record information by including historical member data and subscriber data into interface querying the SQL database; allow for suppression of historical and non-current information from general public display, while retaining the ability for the data to be directly queried.
- Accurately reflect the Administrative Structure in the online membership directory and develop a process to automatically update the Administrative Structure on the MLA Website from this data.
- Develop a process by which queries against the Administrative Structure grant users authorization to access MLA content and services. Access should include the ability to set permissions granularly by group (committee chairs, editors) as well as by individual (Special Officers).
- Develop the ability to generate e-mail distribution lists based on the Administrative Structure and the related contact data for each member.

Rationale
Members should have one place to look to see their affiliations, actions, and history. The business office and special officers with membership responsibilities should have a single comprehensive resource for the data they need. The database should be easy to update, to maintain currency. A current, unified, comprehensive identity management interface can become the generative source for authentication data and various access privileges to secured information and member-only services.

Members should be able to edit their own contact information and decide what can be made public. They should be able to view their payment history and current and past affiliations and activities, and request updates/corrections.

Officers should be able to query and generate relationally-organized results listing members by:
- donation
- location
- activity
- affiliation
- position

Other searches should be able to be made for public information.

MLA Website

The MLA Website, www.musiclibraryassoc.org, is managed by a Web Editor, an Assistant Web Editor, and used by others (Placement Officer) who manage subsets of information presented on its pages (Placement Service, Copyright Guide). The content management system used is proprietary Ektron software. The web design firm that we have worked with and now primarily just hosts the site and provides maintenance, is Astrachan, Inc. The relationship between the web design firm and the web editors could be described as tense, at best. Unreasonable "research fees" force the MLA users of the system to seek work-arounds, and seemingly simple display changes can require a frustrating amount of time and energy. We are definitely not able to use the full potential of the system, or take advantage of the creative ideas of our officers and editors. Nonetheless, the MLA Website has become the central repository for information about the history, work of, and services provided by the Association. That role will grow along side of (or perhaps because of) the increasing demands for internal, web-based support for Association members' work. Easy synergy between the external expression of MLA and the interior workings creating MLA's value and professional content must be a priority.

Recommendations
- The web content management system should be well-documented, easily accessible, and readily supported by a firm or user group that is open to communication, creative brainstorming, problem-solving, and developing solutions that are easy to enact by content authors and site administrators.
- Updating, editing, and archiving should be able to be handled easily and continuously, with a reliable and reasonably understandable interface.
- Consider facilitating communication among the communities we serve and the Association (social networking tools).
- Expand the ability to create and edit selected MLA web pages, both public and secure. If deemed necessary or desirable, the ability to set permissions for "page approval" before edited or new pages go live could be part of this process.

- Expand the use of secure pages to facilitate management of Association activities, particularly publications.   Consider an electronic resource management tool or relational database to help manage and share information within MLA and between MLA and its business office about or relating to contracts — vendor contracts, publication contracts, etc.

Rationale
The Music Library Association merits a public-facing information tool that is flexible, versatile, attractive, and easily maintained. Content creation and maintenance should be able to be distributed in a responsible way to expert parties in the Association. Those parties should be able to work collaboratively, share important data, and communicate securely, to create excellent content demonstrating MLA's vital professional role(s).   The functional goals of the website should be smoothly integrated with all services, publications, and support offered by the Association, allowing the website to become a communication nexus for important issues.

Chapters

All the regional MLA chapters have websites, but the approach to creating and maintaining their sites widely varies. Some have also created blogs, wikis, and listservs, usually hosted by a local institution. Social network participation (only 3 out of 11 chapters have Facebook pages) does not seem to be prevalent. Four have their websites hosted by the musiclibraryassoc.org domain: NEMLA, New York State/Ontario, SEMLA, and Texas.

Management of the chapter – membership, finances, document sharing, committee structures, communication, and even research database development – is a dizzyingly diverse patchwork of ad hoc solutions, often created due to the individual expertise or institutional connection of one particular officer, resulting in maintenance issues when that officer rotates off the chapter board (or moves out of the chapter!).

Recommendations
- Provide all chapters with a uniform set of tools and resources, including website hosting. [Several additional chapters have requested that MLA host their website (Midwest, Southern California)]. The objective is not to have all the websites look the same, but to provide equal access to an easy to use content management system and other management tools. Not all chapters might find a blog or a wiki useful, but they should all have the option available, with technical documentation and some basic usability guidelines on what makes for a successful blog or wiki. Identify other tools (Survey Monkey for online voting, Google Docs or Dropbox for sharing files, etc.) and establish an ongoing common support mechanism for chapters who choose to take advantage of these tools.
- Consolidate chapter membership maintenance and dues collection and record keeping with the MLA Business Office. Incorporate chapter membership into the MLA online join/renew/donate website, as well as chapter administrative structure. Allow a member to view (but not edit) their financial information. (Members would

Comment [MR3]: recommended that we name no existing tools but only needed functions in the final RFP

be able to see in one place if they are current with Chapter, National, or IAML dues.) Multiple methods for the management of chapter finances should be able to be offered to chapter boards (two such examples: (1) chapter-managed: dues are collected and turned over to the chapter; (2) contracted service with the MLA Business Office to manage accounts where the chapter board establishes the budget and the chapter treasurer signs the checks but the business office holds the funds in a bank account).

Rationale
Chapter support needs to be strong and uniform if MLA wishes to expand its outreach and value to the profession. Expanding value from a central conference-based presentation to regionally offered opportunities (workshops and other educational/informational events) will require strong communication and support mechanisms able to take positive initiatives in one region and offer them in another. Consolidating all member/participant data will create opportunities for new synergies as the Association expands its programming (regional workshop attendees offered attendance in a content-related webinar program). The possibility of consolidating routine maintenance functions allows chapter energy to be redirected toward programming content and outreach.

Committees

Committees demonstrate a wide range of working practices and consequently have diverse technology needs. Some, like BCC, use a secure wiki environment (BCC has 6 wikis, actually, using PBWorks). Hosting, however, is not consistent: Preservation's wiki is administered by MLA; Legislation's is not. Some committees have developed e-mail distribution lists, but none are managed by MLA (most are through the committee chair's institution and therefore present support and continuity issues with every new chair). Conference calling, for those who have used it, is primarily via Skype, but that is problematic, since some institutions prohibit installation of Skype, and some members are (justifiably) uncomfortable using Skype because of security concerns. A couple of committees mention using some aspect of MLA's Google Apps for My Domain, with help from Jon Haupt – for communication and document sharing, mostly, with results ranging from adequate to "can't MLA do something better?"

Recommendations
- Provide all committees with a uniform set of tools and resources (even to those that profess not to need them). Should one MLA working group develop a project that would benefit from input by another arm of MLA's administrative structure, sharing and collaboration would be greatly facilitated by harmonizing products and support. These tools should include document sharing, e-mail communication, conference calling, and public web-based distribution of information as well as input/feedback mechanisms (for example, wikis, rss feeds, and blogs). Information on the web should be able to have variable levels of controlled access (available to the world, only to MLA members, only to workshop attendees for a set period of time, etc.) A content management system and cascading style sheets should allow for ease of use and Association branding.

- Enable access to secured resources via authentication and authorization based on the web-based membership directory SQL database and the Administrative Structure.

Rationale
As projects become increasingly multidisciplinary (paralleling the profession), committee work will become more distributed. Improved communication tools, joined with shared software expertise, will provide members with the resources necessary to link their work with the work of others, facilitating collaborative contribution. As membership expands beyond those who can justify annual conference attendance, these tools will support those members as increasing amounts of committee and project work are accomplished virtually.

Special Initiatives

Educational Outreach Program
- Currently a Task Force chaired by Veronica Alzalde has been examining various technologies available for the purpose of establishing continuing education opportunities in a virtual environment, and has recommended a combination of Elluminate and Moodle, although the similarities with Adobe Connect and Sakai were noted and in summary "it may come down to the preferences of whoever is setting up the learning management system, and which tool he or she is most comfortable with."

Other Virtual Interests
- Virtual Convention sessions
- Virtual meetings for the MLA Board, potentially other groups within the Administrative Structure
- Shared virtual workspace for groups within the Administrative Structure
- Virtual Learning Environment course in music librarianship with Association-certified content offered jointly with a library school or the WISE consortium

Recommendations and Rationale
Although these areas may be beyond the scope of our immediate charge and delegated to other task forces (current and pending) to investigate, the technologies needed to accomplish virtual presentation and virtual learning could potentially be interrelated to the needs expressed within this report. (Imagine a learning management system wherein "coursesites" are set up for committees to communicate and collaborate.) The Association needs to capitalize on its investments in technology in innovative and economical ways.

Summary Overview of an Ideal Future State for MLA Information Technology

Please keep in mind that at this stage, the Ideal Future State is a listing of desirable capabilities, not specific products.

- All membership and subscriber data is maintained in a single repository managed by the business office: national MLA and IAML members (including institutional members), MLA chapter members, conference registrants, workshop attendees, Notes subscribers, MCB subscribers, etc.

- Through an online interface, individuals can join or renew MLA/IAML membership (including chapter membership), make donations, register for meetings (national and chapter), register for workshops (live or virtual), subscribe to or purchase MLA publications. The interface may be presented as separate web pages if necessary (ex. registration for a chapter meeting or a workshop), but the corresponding data must be centralized. Online interface accessibility should be available across all activities — conference exhibitor registration should be included.

- Through a web-based membership directory accessible through the same online interface, all members can edit their contact data; they can view but not edit their financial data; they can view but not edit their historical membership activity.

- The web-based membership directory provides multiple tiers of data accessibility and data management (view, edit, restructure); for example, membership data that all members can view (but only the individual member can change, such as an e-mail address), member data that can be viewed by authorized officers of the Association as well as the individual member (such as donation history) but not edited, a higher level of access to data so that it can be viewed and edited by the MLA Business Office (such as registration information), and a top administrative level of functionality able to revise the database format and structure.   Staff at the top administrative level would be able to work directly with Special Officers with unique demands to provide them the functionality they need to perform their responsibilities (example: provide the Development Officer with the capability to search and classify donor activity, able to organize and use available data to generate correspondence, identify donor interests, etc.)

- The web-based membership directory is able to generate the current administrative structure; only current positions are visible as the default, however historical activity can be queried (ex. past chairs of BCC) and the results displayed by all members.

- The current administrative structure maintained in the web-based membership directory can provide real-time authentication and authorization for such services as:
  - shared project workspace for committees, etc.
  - listserv communication for designated groups (like chapters, committees, etc.)
  - access to virtual content for members only, editors only, etc.

- The MLA Website is a dynamic environment, continuously presenting updated information about the Association's activities and services. Responsibility for content creation, management, editing, and updating is able to be distributed.

Secure pages (non-public) are available to support the work of committees, editors, etc.

- There exists a uniform suite of software and services that can be provided throughout the Association's units — committees, workshop providers, chapters, etc., that includes:
    - word processing and document sharing
    - spreadsheet program
    - presentation software
    - website hosting
    - online survey/election tool
    - simple relational database
    - communication tools (wiki, blog, rss)
    - conference calling
    - virtual meeting space (webinars)
    - virtual learning environment
    - streaming conference sessions
- Virtual products created by MLA and its members can be archived.