Information Technology Assessment

Prepared for: New Jersey School Boards Association

Presented September 22, 2017
TO: Dr. Lawrence S. Feinsod, Executive Director, NJSBA
FROM: Michael Esolda, Technology Consulting Services, LLC
SUBJECT: Information Technology Assessment
DATE: September 22, 2017

In May of 2017, you commissioned Technology Consulting Services LLC to engage in a Technology Assessment of NJSBA. This study continues to expand on NJSBA goals and objectives where “Technology meets at the corner of New Jersey Future Ready School Boards”.

PROCESS FOR IT ASSESSMENT

Technology Consulting Services’ objective in completing our IT assessment was to address NJSBA’s current state and future needs for IT technology. The vision is to position NJSBA as the technology-ready leader in training, education, advocacy and support for the advancement of public education and student achievement. This assessment and the related recommendations will also provide a road map with the latest cost-effective technologies for NJSBA’s members and staff as a national leader for Future Ready Schools and Future Ready School Boards.

The IT assessment spanned a 4-month period and included data from the following:

- 8 departmental interviews with 35 NJSBA staff members
- NJSBA Board Officers
- Engagements with 6 vendor partners that support NJSBA’s technology platforms
- 2015 – 2017 NJSBA Strategic Plan
- 2017 NJSBA Staff Technology Advisory Committee Report
- 2017 NJSBA Employee Professional Development Survey
- 2018-2020 NJSBA Summary of Membership Survey
- 2017 Report of the Business Plan Committee
- New Jersey’s Future Ready Schools Initiative
- Mercadien’s Network Management Plan (11/24/2015)
- Mercadien's VSA Plan Assessment (8/18/2016)
EXECUTIVE SUMMARY

The enclosed report includes further details on my recommendations, but I have summarized the major findings in this Executive Summary. Technology is infused in every department, with every staff member that impacts our membership, board members and leading to student achievement. These recommendations will expand technology use to staff and how it impacts and improves the use of technology to the organization and members. It is not just a technology plan, but how we need to exist as an effective and relevant organization.

1. Replace End Of Life Technology and Expansion For New Additions
The recent replacement of your switches was a great step toward updating your IT network, but NJSBA still has a significant amount of hardware and software that needs to be replaced or upgraded. A substantial portion of the equipment has reached the end of its useful life. The current IT environment is hampering some of the staff's ability to work efficiently to serve your members, and upgrades will allow members to engage with the staff and other members more productively. NJSBA is steadily increasing its video production - with further increases expected - but much of the work is being completed using the personal equipment of one of the employees. **Recommendation:** The estimate of one-time costs to complete all of the recommended upgrades is $500,000.

2. Personify – Customer Relationship Management System: Upgrade for Replacement
The upgrade or replace recommendation is still under evaluation, but one thing that is clear is that past decisions to not invest in some of Personify's features have significantly contributed to our members’ frustrations. e.g. website access with program registration, multiple steps to complete tasks, lack of mobility and apps, periodic outages due to legacy premise equipment and older versions of software, in-house tailoring of existing core system which has caused multiple data sources not being shared and lack of accuracy in reports due to this duplication. I will soon be completing this evaluation and making a recommendation to ensure that it meets the needs of the Executive Director's 2017 – 2018 goal to complete an evaluation of the CRMS (customer relationship management system). **Recommendation:** Based on recent Personify demo's the system can do what is needed; upgrade to 7.62 (we are 3 releases behind); Personify to produce a workflow/pricing; included in recommended budget recommendations.

3. Technology Governance to Deliver Reliable IT Solutions and Services
The IT Group should be credited for undertaking development projects currently and in the past that have generated significant savings initially, but this has caused long-term problems when issues subsequently arose and the knowledge source has left NJSBA's employment. The internal development of software enhancements should be minimized to utilize vendors’ expertise and to allow the IT department to focus on its core operational responsibilities. Generally, NJSBA's IT needs are not so unique such that a vendor’s standard software solution would not meet most of the Association's needs. **Recommendation:** On-going engagement with TCS to help implement IT Strategic Plan, if approved. This will require: Governance, Policy, Planning and Budgeting. This would include reviewing entire IT Department related to the Strategic Plan and educating staff on what technology can do for the organization and members.

4. Launch New Professional Development Programs
NJSBA make a further investment to enhance its professional development program for members and employees. **Recommendation:** This would include the restoration of the staff computer training center and could include onsite training, video conferencing, distance learning, web-based and fee-based training. Training topics would include core application system training as well as common desktop applications (e.g., Microsoft Suite, Adobe Products, Google GSuite and/or Google Classroom, Microsoft Office 365 and/or Microsoft Classroom, Apple iWork and/or Apple Classroom, Amazon Web Services).
Technology Consulting Services’ objective in completing our IT assessment was to address NJSBA’s current state and future needs for IT technology. The vision is to position NJSBA as the technology-ready leader in training, education, advocacy and support for the advancement of public education and student achievement. This assessment and the related recommendations will also provide a road map with the latest cost-effective technologies for NJSBA’s members and staff as a national leader for Future Ready Schools and Future Ready School Boards.
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Based on the data that was compiled and alignment of core goals and objectives of NJSBA, the following are the key areas of focus for the technology plan:
AREA 1:

REPLACE END OF LIFE TECHNOLOGY AND EXPANSION FOR NEW ADDITIONS

NJSBA positioned as a national leader as the Future Ready School Boards Association utilizing the latest technology for staff, members and collaboration with other entities.
Area 1 Objectives:

- Critical upgrades to end of life equipment will allow NJSBA to better serve members, deliver more effective services and will allow NJSBA Staff to better facilitate members
- Fund replacements for all end of cycle technology equipment ($500,000)*
- Fund expansion of new technologies, consolidation and virtualization*
- Technology refresh annual budget line item, keeping current with end of life equipment/software*
- Leverage state-of-the-art platform technologies will reduce downtime, delays and expedite delivery of services to membership and staff for current and future capabilities readiness
- Deliver NJSBA business, technology and process integrations more effectively. This will allow continuity of services to members and staff
- Follow industry lifecycle refreshment practices for security preparedness and current technology readiness
  » PC refresh every 5 years
  » Server refresh every 5 years
  » Software refresh as dictated by security preparedness
  » Network equipment refresh every 5-7 years
  » Microsoft Office Products

- Broadcast Studio/ Video Field Production / County Activities and Member Outreach Engagement
  » Segregation of budget from IT Department
  » Critical upgrades to broadcast studio and field production equipment*
  » Resource assessment/additions needed based on current workload and associations needs aligned with NJSBA goals of this department

*SEE APPENDIX A
NJSBA evaluation of the customer relationship management system (CRMS) to improve program data and member engagement.
Area 2 Objectives:

• Task Force formed to review current data needs, evaluating current system, explore other CRMS platforms to better support NJSBA’s goals. (Alignment with Executive Director’s recommendations)
• Move away from tailored in-house applications supporting CRMS. This is a core vendor responsibility including new modules and any interfaces to other systems
• Demo completed of Personify 360 Platform/Personify Cloud/ Personify Go demonstrations
• Immediate Findings/Recommendations:
  » Personify is 3 versions behind
  » Current Version 7.52 will go end of life June 2018
  » We will be charged a 25% increase if we do not upgrade
  » Based on demo week of 9/18/2017, new Personify 7.62 upgrade can meet NJSBA’s current and future needs
  » Personify to provide a detailed workflow/pricing, specifically to eliminate all past, current and future tailoring of in-house software development
  » Review pricing and if agreeable recommend to upgrade to 7.62 cloud version/mobile version
• If we choose to look for other software packages: Survey School Boards throughout the country and select the top CRM systems used. Coordinate demonstrations of these systems with the appointed Task Force for assessment.
AREA 3:

TECHNOLOGY GOVERNANCE TO DELIVER RELIABLE IT SOLUTIONS AND SERVICES

NJSBA will be the national leader in new technologies for membership and staff supported by the Information Technology Department.
Area 3 Objectives:

Strong leadership and governance is required to oversee the IT strategy for NJSBA

• Continue engagement with TCS to help implement IT Strategic Plan, if approved
• Develop policies and procedures (computer use and Internet policies, cyber security professional development, penetration testing for security breaches (external and internal-annually), confidentiality, OPRA/document imaging)
• Develop goals and objectives aligned with NJSBA Strategic Plan
• Review of all IT positions aligned to membership / staff support
• Re-direct current IT Staff to other functional areas of support (leverage managed services / core software vendors to do computer maintenance and application development)
• Continue renewal of managed infrastructure and help desk support with vendor Mercadien
• Continue to follow NJSBA Future Ready Schools gears for technology readiness ; IT Certification; Education K-12 job descriptions for all IT staff current and new
AREA 4:

LAUNCH NEW PROFESSIONAL DEVELOPMENT PROGRAMS

NJSBA to expand training opportunities to promote and foster individual and organizational effectiveness; increase efficiency and productivity for NJSBA staff and members.
Area 4 Objectives:

- Immediate outfitting and restoration of the staff computer training center including: PC's, Chromebooks, IPADS, mobile devices. Including Apple TV / Chromecast (Future Ready Training Center)
- Training not limited to core application system training but to include common business desktop applications (Microsoft Suite, Outlook, Adobe Acrobat, Google GSuite and/or Google Classroom, Microsoft Office 365 and/or Microsoft Classroom, Apple iWork and/or Apple Classroom, Amazon Web Services, Dropbox and/or fileshare, upgraded calendaring, fillable forms, e.g. travel expenses)
- Training vehicles (Board Officer's requests) to include onsite classes, video conferencing (partnerships with vendor members to deploy latest technologies free of charge as a demo training center), distance learning, web based, fee based
- Drive improved employee moral through deployment of leadership and personal development programs
- More collaboration between departments through in-house on-going helping members and staff
SUMMARY

Following the recommendations above will position NJSBA as the technology-ready leader in training, education, advocacy and support for advancement in public education and student achievement. This IT Assessment provides the comprehensive and detailed view of IT in NJSBA which has been requested.

Most important, it emphasizes the critical needs from the NJSBA’s administration and staff to better support membership and growth through the Information Technology as the essential prerequisite to achieving significant improvement for the NJSBA’s mission statement.

This IT Assessment recognizes that a strong Information Technology Department and leader occupies a unique and critical position in helping to assure that NJSBA makes steady progress in IT both wisely and cautiously. Thereafter, it presents almost 50 findings and recommendations which have a direct tie to business process, economy and efficiency throughout the NJSBA and its membership.

The phased implementation which this IT Assessment presents give NJSBA a clear, set-by-step roadmap for what needs to be done, including all one-time and annual costs. Finally, NJSBA leadership has a critical role both in launching the implementation of these recommendations successfully and sustaining their fundamental importance in enhancing NJSBA services over the longer term.
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<th>Challenge</th>
<th>Proposed Solution</th>
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<th>Next Steps</th>
<th>Resources</th>
<th>Timeline</th>
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