

# Evaluation of the Australian Men's Shed Association

## **PART 5 IT SYSTEMS REVIEW**

Final Report

**31 AUGUST, 2016**



**.SIGGINS MILLER**



## Contents

Preamble .....	4
Main Messages.....	4
Recommendations.....	4
Evaluation Question 5 A. ....	5
Current IT Infrastructure .....	5
Current Application Suite .....	6
Information Resources .....	6
Evaluation Question 5 B. ....	7
Proposed Application Suite .....	7
Application Interoperability .....	8
Outcome of the review.....	9
ATTACHMENT 1 .....	11
Online Grant Manager Functional Specifications.....	11
Overview.....	11
Roles .....	11
Software Functional Capabilities .....	11
Other Software .....	12

## Preamble

Siggins Miller's subcontractor Managed Solutions undertook a review of Information Technology (IT) at the Australian Men's Shed Association (AMSA). This review was undertaken on the 17<sup>th</sup> and 18<sup>th</sup> of May 2016 at AMSA's office in Newcastle. During the review the following people were interviewed:

- AMSA Office Staff
- ICT Manager, Catholic Care (IT Hosting Provider)
- Director, Redback Solutions (AMSA website host/developer)

## Main Messages

- The infrastructure in use by AMSA now and in the near future meets all of the criteria of a business of this size. The infrastructure is appropriate, effective and extremely efficient.
- Based on AMSA's size and operations, the current approach to secure storage and records management is appropriate, effective, efficient and reliable.
- The current information technology resources were adequate at the time of their installation and were cost-effective. However, the increased amount of data, information resources and traffic through the website, together with a lack of resources for upgrading means that, six years later, they are in need of updating to achieve greater efficiency.
- Planned software upgrades and moving to a web based membership database and a (possible) on line Grants Manager that are inter-operable will reduce duplication of effort and increase the efficiency of high volume work processes.
- AMSA will need to maintain both the current paper based grants programme and the new web based version because of the varying levels of technical resources and ability at the sheds.
- The SMART Web Portal will address many of the concerns of members about its functionality, will extend the reach of the application to non PC devices and will remove the need for member sheds to do backups.

## Recommendations

1. Proceed with the proposed upgrades to infrastructure and software, based on the quotations received.
2. Maintain both the current paper-based version of the Grants Program as well as the proposed new online system, at least for a transition period
3. Ensure that AMSA connects to a 12MB/1MB NBN service before 11 August 2017.

## Evaluation Question 5 A.

***Does AMSA provide appropriate, effective and efficient support to men's sheds across Australia, including: IT services – shed locator, information resources, secure storage and records management?***

### **Current IT Infrastructure**

The current AMSA IT infrastructure is based on Microsoft Terminal Services (2008 R2) on Hewlett Packard (HP) Windows terminals providing computing resources to all staff.

Several laptops and tablets are also available for casual use and remote access. Several staff members also use Terminal Services remotely to access the AMSA server.

Catholic Care hosts the AMSA server on VMWare virtualised infrastructure with enterprise grade redundancy and recoverability. The Catholic Care server cluster ensures that all virtual machines are replicated to multiple data storage devices and can be recovered in the event of a total cluster failure on offsite service infrastructure within 20 minutes. Single server failures are recoverable in several minutes.

The AMSA office connects to the server cluster via a Telstra ADSL service with backup access available via mobile phone hot-spots in the event of ADSL failure.

*How does the infrastructure compare with industry standards (cost effective, fit for purpose)?*

The use of Microsoft Terminal Services is industry accepted best practise for deploying Windows infrastructure into an organisation the size of AMSA in the most cost effective and maintainable manner.

*Based on AMSA's size and operations, is the infrastructure appropriate, effective and efficient?*

The infrastructure in use by AMSA now and the near future meets all of the criteria of a business of this size. The infrastructure is appropriate, effective and extremely efficient.

### *Effectiveness of the website, including Shed Locator*

The Men's Shed Website is the primary vehicle for disseminating information to members. It contains shed resources, a shed locator, men's health information, and other relevant resources. It is hosted by a third party<sup>1</sup> and is built on a modern and maintained Content Management System (CMS).

Google analytics for the month of May 2016 indicates that the AMSA website currently receives in excess of 40,000 page views per month from more than 13,000 unique visitors. Of these users, 33% (4290) are from Australia.

The shed locator component of the AMSA website receives 10,000 page views per month which accounts for 25% of the total page views. As a single component of an extensive information resource, it would indicate that the shed locator is a key resource that is very popular at this site.

Additionally, the member login redirect page has in excess of 200 page hits a month, indicating more than 200 successful member logins.

### *Secure Storage and Records Management*

---

<sup>1</sup> Redback Solutions <http://www.rb.com.au/>

All current electronic records are hosted on the hosted server infrastructure provided by Catholic Care. All data is replicated across multiple storage services that provide a high level of resilience against disk failure and all data is backed up to a Storage Area Network (SAN) before being moved to secondary storage. Archival tape backups are kept offsite for additional data resilience.

*How does the secure storage and records management compare with industry standards (cost effective, fit for purpose)?*

AMSA's digital storage and records management are in line with industry standards and are backed by the robust and secure storage architecture and processes in place at the hosting company (Catholic Care).

*Based on AMSA's size and operations, are the secure storage and records management appropriate, effective and efficient?*

Based on AMSA's size and operations, the current approach to secure storage and records management is appropriate, effective, efficient and reliable.

### **Current Application Suite**

The current suite of software used at AMSA is:

- Microsoft Office 2007
- ACT Contact Management 2010
- Men's Shed Website
- MYOB
- SMART (Shed Management and Resource Tool)

### **Information Resources**

ACT Contact Management provides a repository of all AMSA clients and tracks the history of email and phone activities against clients. ACT has a current issue sending bulk emails due to the size of the database. In recent times there have been problems with bulk emails failing from ACT. Technical support for the product has indicated that the size of the database is a contributing factor to these problems.

SMART is a standalone windows application commissioned by AMSA for use in a shed. It was developed by Redback at a cost of approximately \$80,000 that included 3 years of support and maintenance. It provides membership, asset and OH&S services to member sheds. This software is in use by more than 600 sheds but is not currently maintained due to budget constraints. The last update was released in 2013.

Other information resources like manuals, guides etc. in pdf or word format are available for download. The following Table lists the documents downloaded from the new AMSA website in order of frequency as at 28 June 2016.

Table 5. Downloads from AMSA website

<b>Document</b>	<b># times downloaded</b>
AMSA Resource- The Work for the Dole Programme Manual Feb 2016	51
AMSA Resource- The Spanner in the Works Programme Manual Feb 2016	40
An AMSA Resource Test Intervals Class of Work	37
AMSA Resource Men's Shed Strategic and Business Planning Worksheet 2016	29
Running an Association NSW	26
About Associations NSW	25

AMSA Resource Assets Register incorporating Test and Tag Mar 2016	21
Before incorporating a new Association NSW	19
Work for the Dole Host Induction Kit 15 October 2015	19
An AMSA Resource Test and Tag Technical Information Feb 2016	17
AMSA NEWSLETTER MARCH 2016	15
Mutual Obligation Requirements including Annual Activity Requirements Guideline V1.2	14
Work for the Dole Host Organisations Factsheet	12
Qld Incorporated Associations Guide	11
Employment Services 2015 Factsheet	10
SA Incorporated Associations Guide	7
Victoria Incorporated Associations	7
WA Associations New Laws July 2016	1
WA Guide for Incorporated Associations	1

*How does the current provision of information resources compare with industry standards (cost effective, fit for purpose)?*

The current information resources were adequate at the time of their installation and were cost-effective. However, the increased amount of data, information resources and traffic through the website, together with a lack of resources for upgrading means that six years later they are in need of updating to achieve greater efficiency.

*Based on AMSA's size and operations, is the IT-based provision of information resources appropriate, effective and efficient?*

The proposed upgrades will address the deficiencies that have emerged and are likely to enhance the provision of information to members and about members.

### **Evaluation Question 5 B.**

***Are AMSA's IT systems (website Shed Locator, membership database, accounting system and NSDP grants) able to achieve interoperability? Both upgrading existing systems and replacing them should be considered. Note: the NSDP does not currently have an IT system but needs to be included. (Please provide recommendations and IT specifications for the purpose of obtaining quotations).***

#### **Proposed Application Suite**

AMSA has identified the following application Suite upgrades and has obtained quotations<sup>2</sup> for the following:

- Microsoft Office 2010
- Web based CRM to replace ACT
- SMART Web Portal
- Online Grant Manager

Microsoft Office 2010 will be upgraded on the virtual server by Catholic Care to bring the software up to a more current version. This upgrade will occur out of hours and will have no

---

<sup>2</sup> Quotations are from Catholic Care (for Microsoft Office upgrade); from Redback for the web-based functionality upgrades (Quote documents Q14031601, Q14031602 and Q14031603)

operational impact on the office. It is expected that some recent problems with Outlook will be resolved in the upgrade.

A web based Client Relationship Management (CRM) application has been proposed to replace the ACT Contact Manager software. Quotations for the upgrades have been provided to the evaluators and, based on the required functionality, the proposals are appropriate to the identified needs of AMSA and are achievable. The proposed prices for these upgrades are competitive. The new CRM will be hosted in an enterprise grade web hosting facility and will integrate with the existing Men's Shed website. It will also integrate with the proposed SMART Web Portal and Online Grant Manager applications to ensure a single source for key information. Currently there is both a duplication of information and effort around member details between the ACT application and the Men's Shed website (see Part 4: Business Process review).

The SMART Web Portal is a web based upgrade to the existing SMART standalone PC application. The new web portal will provide the same functionality via a standard web browser. This will extend the reach of the application to non PC devices as well as resolve the issues around functional upgrades as experienced with the PC application.

The Online Grant Manager is a proposed web application<sup>3</sup> that will allow member sheds to complete and submit their National Shed Development Programme (NSDP) grant applications online. This application will be linked to the Men's Shed website to ensure correct access and security for each shed and will provide backend access for AMSA staff to evaluate submitted grant applications.

#### **Application Interoperability**

Both ACT Contact Manager and MYOB Accounting Software are hosted on the Catholic Care virtual servers. Neither product offers Application Programming Interface (API) access to remote services such as the AMSA website. Developing database interfaces between these products and the website will require significant application development to ensure secure and reliable operation and additional ongoing maintenance as these products are upgrade over time.

Development of both a web based CRM and NSDP Online Grant Manager will provide the opportunity to integrate the functions of the membership database and contact details with the shed locator website member details. It will also allow the AMSA website to provide the delivery mechanism for both the NSDP Online Grant Manager and SMART applications, ensuring that only member sheds can access these resources.

---

<sup>3</sup> Redback Document (Q14031601)



## Outcome of the review

- The current server and client infrastructure in use at AMSA and maintained by Catholic Care is of a high standard and this relationship should be maintained going forward. Not only does Catholic Care provide a high level of service but they also provide it at a very competitive rate.
- The ADSL service provided by Telstra currently runs at 3Mbits/sec for download and 0.3Mbits/sec for upload. This is causing lag on the terminal server sessions for all users. The National Broadband Network (NBN) has recently been deployed in the local area and AMSA should take advantage of this new connection. A low end 12MB/1MB NBN service will provide adequate performance and will most likely cost less than the current ADSL service. There is no need for any faster NBN service as terminal services won't take advantage of any additional bandwidth.

Once the NBN has been delivered to an area a deadline is presented for all existing copper based services to be terminated. The shutdown date for AMSA is August 11, 2017. AMSA maintains a single phone line and handset on the copper based service. This service should be discussed with Telstra for conversion over to the NBN infrastructure prior to August 2017.

- The replacement of ACT Contact Manager with a web based CRM will provide a connection between the CRM and shed website for common data such as member shed details, usernames and passwords. Additionally, the intellectual property (IP) for the CRM and the website will be retained by AMSA providing protection against issues with suppliers and ongoing licensing costs.
- The web based SMART application and the Online Grant Manager will greatly reduce the double handling of member and contact data. Providing a single source of data for member details such as login credentials will also cut down the effort required in maintaining member information. Linking to email and phone calls will also greatly increase the functionality of the CRM and provide the necessary history of contact with the member sheds.
- Upgrading the existing SMART application to a web based application will provide both a mechanism for updating SMART functionality in the future and will remove the need for member sheds to do backups. This increases the resilience of the IT services provided at the shed and also leverages the disaster recovery capabilities of the web hosting company to ensure the reliability and accessibility of SMART at the shed. SMART has a strong user base with existing skills at the sheds so the move to a web based version of the software shouldn't incur the support costs (time and money) that is normally associated with rolling out new IT functionality to the sheds.
- AMSA is investigating the development of an Online Grant Manager to assist with data collection during the 2 rounds of grants applications each year. AMSA will need to maintain both the current paper based programme and the new web based version because of the varying levels of technical resources and ability at the sheds<sup>4</sup>.

---

<sup>4</sup> Data from the online surveys of members indicate that 94% of *individual members* who responded to the *members' survey* had a computer or smart phone; and that 58% of them had internet access at home and 20% had internet access at their Men's Shed. But, of course, **the survey was online** and so did not capture those members who are not computer literate or do not have internet connectivity. In the *Office Holder's survey* (a sample of about 24% of AMSA Sheds), 21% of Office Holders reported that *their Shed* had internet connectivity and 20% reported that *their Shed* had computers. A lack of Shed connectivity does not mean that individuals associated with a Shed do not have computer access at home or elsewhere. However, the extent of internet access and computer literacy across the whole Shed membership remains a 'known unknown' and the

Typically, when new services are offered by AMSA on the website there is a marked increase in the number of phone calls and end-user support that is provided by AMSA staff. The introduction of an Online Grant Manager will increase the existing support effort within the AMSA office during each grant period.

- Note: The Statement of Requirement called for this IT review to “provide recommendations and IT specifications for the purpose of obtaining quotations.” At the site visit the IT reviewer was provided with Quotations that had already been received from current providers. Therefore, the IT Reviewer checked these quotations against the AMSA’s current and future requirements. The quotations were found to be appropriate to the identified needs of AMSA; achievable, priced competitively and cover the period of the funding agreement.

---

maintenance of a paper-based option for the NSDP Grants process, at least for a transition period, is recommended.

## ATTACHMENT 1

### Online Grant Manager Functional Specifications

#### **Overview**

The AMSA Grant Manager application will provide an online tool to assist with the data collection and assessment phases of AMSA's NSDP grants programme. It will provide an online replacement for the current paper based process for those member sheds who have the necessary resources and skills to access and use an online web based application.

#### **Roles**

Applicants are the delegated authority for a men's shed who can log in to the AMSA Grant Manager application to complete a current round grant application form online.

Administrators are AMSA staff who manage and maintain the necessary data, login credentials, grant questions and criteria in the AMSA Grant Manager application.

Assessors are the individuals who login in to the AMSA Grant Manager and evaluate each proposal and assign scores to each application according to the rules of the current grant programme.

#### **Software Functional Capabilities**

- Applicants will complete a grant application online in a manner similar to that presented in the current paper based process. The information entered will be the same as that required by the current paper based process.
- If an applicant has a current AMSA website login, this will be used to pre-populate the applicant and shed detail areas of the form. If they are not AMSA members, they must complete these sections manually.
- Applicants can access the online application only while the application period is open and accepting applications.
- An application can be entered and updated until it is submitted for assessment or the programme closing date is reached.
- An applicant will upload and manage supporting documents and files as required by the current grant programme.
- Online help will be provided to applicants including links to the existing "Handy Hints" documents provided by AMSA for preparing applications.
- On submission of an application the applicant will receive confirmation of the application being lodged via email.
- Administrators will manage and maintain login credentials for non-AMSA applicants.
- Administrators will set the opening and closing dates for grant applications and the software will manage access according to these dates.
- Administrators will manage and maintain the questions that will be presented to applicants during the application process. Questions from previous grant rounds can be used as templates for creating new questions.
- Administrators will assign weighted scores to applications based on the criteria required for the current grant application round.
- Administrators will manage and maintain the credentials and details of the panel of assessors for the current grant round.
- Administrators will export the application data including scores into Excel for presentation and analysis.
- Assessors will log in to the AMSA Grant Manager to view and evaluate each application. The assessor will have read-only access to the question responses and attached supporting documentation and files.

- Assessors will score each application and these scores will be collated for final reporting.
- On completion of a grant round the grant applications and supporting documentation will be archived in the software for future reference.

***Other Software***

- The AMSA Grant Manager must integrate with the current AMSA member website database to extract the necessary applicant details to pre-fill personal and shed details in an application for an AMSA member.
- The AMSA Grant Manager must be available as a link from the current AMSA website.
- The AMSA Grant Manager must integrate with the AMSA CRM or ACT Contact Manager to provide a record of a grant application in the CRM for future reference.
- The AMSA Grant Manager must export the grant application details, scores and average scores as an Excel spread sheet for further reporting and analysis.
- The AMSA Grant Manager application must work on all major browser types including Internet Explorer.