LUCIDEA

THE COUNCIL FOR ADVANCEMENT AND SUPPORT OF EDUCATION

Unrivaled Member Support; CASE's Secrets to Success

INMAGIC Presto.

Success Story

THE COUNCIL FOR ADVANCEMENT AND SUPPORT OF EDUCATION CHALLENGES

- Single Sign-On (SSO)
- Highly customizable without reliance on IT
- Granular permissions management

"With more traditional systems, if you want to take things to the next level you would probably have to buy an extra piece. Whereas Inmagic Presto grows with whatever you want to do … it's so flexible and extensible. The bottom line: we don't need a new system in order to grow."

CINDY MOON-BARNA
Director, CASE Library
The Council for Advancement and Support of Education

The Council for Advancement and Support of Education (CASE) supports institutions of higher education and independent schools worldwide, with all of their advancement activities—including fundraising, alumni relations, marketing, communications, and advancement services itself, which is the back of the house for fundraising activities. CASE puts on 75 in-person networking events a year, and they have 3,700 institutional members worldwide; that translates to 88,000 individual members. Per Cindy Moon-Barna, Director of the CASE library, the library's mission is "fulfilling member requests and creating online content".

MEMBER ENGAGEMENT

The CASE library is specifically included in the association's strategic plan. One of the plan's imperatives is member engagement—including the whole notion of "one CASE". Implementing Inmagic Presto delivers strong support: having the catalog available worldwide, 24/7/365 allows all 88,000 members working remotely to do their own research and content related self-service.

Inmagic Presto's single-sign-on feature is critical to member service; it automatically creates a profile for each member when they first enter the system, and subsequently they are seamlessly passed through without logging in, removing that barrier to entry.

INDEPENDENCE IS A GLORIOUS THING

While member engagement and self-service were the ultimate goals, the first rollout was for the library staff. With a small team of four and a large user base, they wanted a feature-packed system that was still easy to learn and manage, without heavily relying on the CASE IT department. Lucidea's software-as-a-service (SaaS) hosted solution is perfect for their needs because IT doesn't have to "babysit" or allocate space on a CASE server; everything is taken care of and all updates are done for them.

Ms. Moon-Barna feels strongly that "Inmagic Presto is the right size solution for the association space. At CASE, the IT department pays the bill and they are happy to pay it. Which is a glorious thing. Presto costs a bit more than some—but it delivers so much more. We really believe this is the best money spent on a big-ticket item like a KM system, and the best return on investment."

She states that a highly customizable system is key within the association space, where instead of following MARC conventions, for example, they have their own system for cataloging and their own subject headings. They can create all the terms and fields exactly as they need them—completely customizing the catalog for the needs of their members. The CASE collection is very specialized. Says Ms. Moon-Barna, "Everything we do is about advancement: fundraising, communications and marketing, alumni

relations—supporting higher education, and the independent school environment. Customizing Inmagic Presto to suit those unique requirements cuts down the noise."

PROVING IT

Being able to analyze the data captured by the system is very powerful. Moon-Barna and team can work with all kinds of metrics (event tracking, numbers of new users, how many downloads, how many searches) and look at trends over time, e.g., what are the top five topics of interest to members, which regions generate the most requests, which are the top five schools they get questions from, and so on. That information is useful for the writers of the CASE magazine, and also very useful for the Membership department to justify member renewals. Library services are a major benefit of CASE membership, and with Inmagic Presto it's easy to compile and present statistics on exactly how much a specific organization derives from CASE content. Data analysis is useful for the volunteer engagement team; they can use it to promote the library at meetings out in the field and fuel awareness of its services.

That said, Ms. Moon-Barna is hesitant to market the library's research services; with a 10% uptick in requests and no increase in staff, that's a setup for stress. They do market their Advancement Resource Catalog (ARC) and the subject guides on their website; essentially, they promote the things that enable member self-service. The response from staff, members, and conference faculty has been extremely positive. For example, anyone not on the East Coast particularly loves leveraging their self-service options as they can't fall back on a quick phone call at the time of need. Conference faculty love it for developing their programs, magazine staff use it for research as they write stories, and they look in the ARC when they're writing talking points for their President about CASE's impact. (And, for help with handling the research load, Inmagic Presto allows them to create a database of past requests, for reuse or updating, which is a "huge time saver".)

THE RIGHT CONTENT TO THE RIGHT PEOPLE, WITH THE RIGHT OPTIONS

Naturally enough, when opening the catalog to members, the need for security and permissions management becomes more important. With Inmagic Presto, they can create as many different roles and permissions as they wish. For example, temporary staff can read but not edit/delete, and there are separate roles with differing views and screens for librarians, non-library staff, and for members. Per Ms. Moon-Barna, the system offers very robust permissions management while being very easy for an administrator to control and edit.

The system is highly flexible and customizable in other areas as well. CASE recently launched a new website, and they asked Ms. Moon-Barna to accommodate their new look and feel with the information center screen. She was able to quickly rebrand and match the organization's website using Inmagic Presto's theme options, and just a little help from the "professional, open, and responsive" Client Services Team.

Because she knows Inmagic Presto is flexible and extensible enough to "grow as you grow", Ms. Moon-Barna has a list of potential projects that, among other things, involve doing more with eBooks and digitizing existing collections. Inmagic Presto can do full text searching of all digital content. At CASE, thirty years of paper articles are now starting to be turned into PDFs; with Presto, they are fully searchable, and of course the library has supplied very robust metadata as well. They are working on a digital photo archive of CASE's history for their 50th anniversary, and are limited only by staffing issues—Inmagic Presto can do what needs to be done. Says Ms. Moon-Barna, "The thing I love about Presto is that it's customizable. But the thing that drives me crazy is that it's customizable! Sometimes you really shouldn't go back to the well."

CASE's Inmagic Presto implementation is particularly relevant in 2020, with COVID-19 making virtual work imperative. Per Ms. Moon-Barna, it keeps the Library up and running without a physical space—highlighting the value of 24/7/365 self service access.

In conclusion, Ms. Moon-Barna told us, "I couldn't possibly have a vendor or product that I'm happier with. As is typical in the association space, the information center isn't a revenue generator; we are pure overhead. So, it's really important to maximize the dollars we do have. The fact that we can do so much with this product is just huge. For libraries like ours where it's really about quality, Inmagic Presto is a fantastic solution."

ABOUT LUCIDEA

Lucidea is the premier knowledge management software company, helping people navigate the ever expanding universe of information, turning it into actionable knowledge. We achieve this by providing tools that accelerate access to knowledge resources, while simplifying their management.

To learn more about Inmagic Presto and how it can help solve your knowledge management challenges, visit **lucidea.com/inmagic-presto**

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