

Uknight Plan 2 Assessment

In their September 4, 2015 proposal letter to the Knights of Columbus, Uknight outlined 5 plans for consideration to move forward in partnership with the Knights of Columbus. Several members of the Uknight committee were asked to review plan 2 and provide comments on it. My comments on plan 2 follow. They are based on the documents presented by Uknight, investigative reports completed by Ian Kinkade, and the in-person meeting I attendee with Uknight in Texas.

Plan 2 Highlights

Under Plan 2 Uknight is proposing the following key items:

- Knights to pay a setup fee of \$500,000 over 2 years (\$250k/year)
- Knights to pay an ongoing access/service fee equal to 10% of council subscriptions
- No access/service fees to be paid by Knights for General Agent or Field Agent accounts as long as the Knights agrees to collect the subscription payments from the GA/FA on behalf of Uknight and forward them to Uknight on a to be determined schedule
- An advisory board consisting of 7 members (5 Knights/2 Uknight) will be established for oversight.

Uknight provided financial projections for this plan as well as a project gant chart laying out a high level timeline for 12 months of technical improvements.

Set-Up Fee

The setup fee is designed to allow Uknight to cover the costs associated with the Knights specific requirements around the technical updates as shown below:

	Current	2016
Immediate External Technology Development		
Outside - WSM - Move to Rackspace	\$3,750	\$3,750
Outside - Review and clean up code	\$7,500	\$7,500
Active Directory Implementation (server Comm Link)	\$12,500	\$12,500
Outside - Desktop Redesign and Build	\$75,000	\$75,000
Outside - Mobile Design and Build	\$75,000	\$75,000
Outside - Translation French (@ \$0.16 per word)	\$37,500	\$37,500
Outside - Translation Spanish (@ \$0.16 per word)	\$37,500	\$37,500
Total Technology Set-Up	\$248,750	\$248,750

Uknight provided a high level gant chart for a 12 month project for these technology upgrades. The high level milestones tasks they identified are

1. WSM - Move to Rackspace
2. Review and clean up code
3. Create Test Environment

4. Discuss and Design Active Directory for Server Comm Link
5. Build Active Directory and Interfaces
6. Discuss & Design Stylesheets, Graphics, Responsive Design/Implement changes
7. Discuss and Design Mobile Site/Build New Mobile Site
8. Design & Build New Help Desk Tools / Knowledge Base
9. Develop Translation Interface/Translation French/Translation Spanish

Although the details are not presented clearly, based on the cost estimates and the timeline for items 2, 6, and 7 this technology enhancement appears to be a migration or conversion of their existing platform without substantive changes to the overall design. In our discussions with Terry from the Uknight he did not seem to have a full appreciation of the need for a full redesign and implementation on a modern platform. It appears that they are still only looking at moving from one old style technology to a slightly newer technology and are not considering major changes in the site and database design. There is no mention of a database redesign in the high level plan. Additionally, it is not clear to me why they want to implement a Mobile site; if they are changing their site to a responsive design a separate Mobile site should may be necessary. A discussion on why they are choosing this design strategy may be a topic for the advisory board. I believe this plan underestimates what would truly be required to bring the Uknight platform forward technologically. An excerpt from the June 2015 report of Ian Kinkade is below more accurately describes what I would expect for a redesign.

- *Investigations of a complete redesign of the site have revealed the following estimates:*
 - *Ranges between 30K and 50K for the redesign*
 - *Ranges between 200K to 320K for coding, testing, documentation and deployment*
 - *Utilizing existing Portal Service Offering, the cost could be dramatically reduced and would really be focused on redesign and styling of the site. There are a number of vendors offering off the shelf portals with customization/configuration tools that would enable rapid deployment at a fraction of the cost of coding. Additional investigation would be required to ensure that this type of service could support the potential number of users and groups. One of the most popular portals is Liferay (www.liferay.com).*
- *The current Data Base utilizes Microsoft SQL Server and with 256 tables illustrates a lack of understanding of database design. It is admirable to consolidate all of the individual site parameters, data and links to videos and links to pictures in the database but there should not so many tables to define these entities. In addition, the authentication of users is also stored in the same database and the user passwords are not encrypted.*

Additionally, there needs to be consideration for the fact that the current system is not documented and has been mainly developed by one person without following any standards or best practices. The task of documenting the current system as well as the requirements for moving to a new platform should not be underestimated. I do not believe they are giving this factor enough consideration.

There is no high level plan for the second year of technology development. It unclear why these costs extend for a second year, what benefits they will bring, or how the costs were arrived at. However, within the second year Uknight does show hiring on of full time technical staff which would be a positive step and necessary for them to be able to support the growth they are projecting while continue to move the technology forward.

Access/Service Fee

As the proposal is laid out this fee appears to go on in perpetuity. As more councils sign up, which will generate more revenue for Uknight the cost for the Knights increases. While it serves to increase the bottom line for Uknight, I am hard pressed to see where it is benefiting the Knights. As the number of councils on the Uknight platform increases, I would expect the need for subsidy from the Knights to decrease. If the Knights wishes to pursue this I would suggest that it decrease in % year over year and be limited to no more than a 5 year period.

GA/FA subscriptions

There does not seem to be a substantive reason to have the Supreme office collect the subscription fees from the GA/FAs and pass this on to Uknight. This does not support the requirement to have Uknight operate independently from the Supreme office and will require administrative personnel to manage and administer this. This may also generate a requirement for system modifications on Knights internal systems which would also be an added cost both for implementation and maintenance.

Advisory Board

The advisory board would bring some level of control and oversight to how Uknight is representing the Knights of Columbus. Uknight specifically called out three purposes to the group.

1. To review, accept or reject all proposed changes related to the functionality of the UKnight System
2. To review, accept or reject proposed changes to any K of C system that impacts the UKnight system.
3. To review, accept or reject material created to promote the UKnight Interactive system.

While I believe items 1 and 3 reflect what the Knights would like to accomplish, I do not believe it is appropriate to have Uknight weigh in on change to the K of C Systems.

Additionally, there is a resource commitment of 5 Knights representatives to participate in this Advisory group. This is probably not a small time commitment especially in the early stages. Although I do not anticipate any new staff being added to the Knights to fulfil these roles, there is an opportunity cost.

Summary

The Uknight committee was asked to evaluate Uknight and explore the parameters and options for a relationship with them. This has been a challenging task because Uknight does bring the value of the existing subscriptions that they have, the understanding of the fraternal organization, the customer service they provide, and unique interaction between councils and agencies provided by their site. What continues to be a stumbling block, in my opinion, is their ability to see a clear technological path forward. Uknight has invested a significant amount of time in building what they are offering today, but they have not been able to embrace a new way of thinking to bring that technology to the next level. I do not think an investment of \$250-500K by the Knights based on the Uknight current plan will bring the technology to where the Knights would want it to be. The implementation of the advisory board may

help to balance some of this, but the legality of that board and what they do or do not have control over at Uknight would need to be carefully put together and reviewed.

Uknight indicated they have the ability to gain financing elsewhere, it may be an option to setup the advisory board in exchange for endorsing them as a solution for council and agents sites, but without financially backing them. They would gain the endorsement of the Knights, which is what they have represented has been the stumbling block to their growth, the Knights would gain some control via the advisory board but limit the amount of financial exposure. This would also have to be evaluated from a legal perspective and it may be difficult to get Uknight to agree to the advisory board without the financial investment.