Indiana Public Defender Council

To: IPDC Board of Directors
Date:
Re: Information regarding Chatter and Listserv alternatives.

Background

Indiana's Office of Technology (IOT) decommissioned all state listserv email services on September 15, 2020. At the time of decommissioning, the only alternative offered by IOT for support was Microsoft Teams.   In June, a proposal was brought to the Board in which staff recommended that all listserv groups be moved to Chatter for several reasons:

1) Ease of migration of members to Chatter;
2) The ability to pull documents shared by members and store them in a searchable library;
3) Single sign-on for members services; and,
4) Chatter is included with our current license for the Salesforce Community so no additional costs to the Council.

Issues with Chatter and Resolutions to date

A number of issues have occurred with Chatter. The primary issues are:
1) <u>No subject line</u>. End users only know the group from which the email has been sent.
    a. This is an issue with Salesforce Chatter. Many users of Chatter have asked Salesforce to modify its policy with respect to subject lines but it has not yet changed that policy.
2) <u>Attachments do not pass to recipients' email</u>. All attachments are stored by the Salesforce Community site and placed in to the library associated with group in which the sender sent the message. Users receive a notification in their email that a file was attached, but must click a link in order to download the file from the Salesforce Community site. Users must log into Salesforce in order to download the file from the Chatter group page.
    a. This is common with community listservs and distribution groups. Attachments are often sources of computer viruses, phishing software and malware so companies remove them and sequester them into a separate location so that any metadata (the place where the virus or malware is stored) is removed from the file. This ensures that the file is safe to download. This is unlikely to change.
3) <u>The full name of the sender does not appear in the email header</u>
    a. Our developer (Brite Systems) is working to find a way to change this. Signature lines do appear in posts as well as the sender's photo should the user wish to upload one.
4) <u>Not all messages in a thread appear when users choose to receive every message instantly</u>. The default setting is to receive every message as the message arrives. When

that is the option, a user's initial message goes to all end users, but subsequent replies/responses are not received by all users. Instead, only users who have replied/respond to the original or to subsequent message or who have "Liked" the message see all of the posts. Members who choose to receive Chatter message as a daily or weekly digest do see all messages.

  a. The assumption with respect to discussion groups is that users only want to see message threads they've initiate, responded/replied to or have "liked." Historically, Defendnet users received every message—the initial message and all subsequent responses and replies. In order to see every message in Chatter, the developer will need to set every user's profile to "Like" every post. This will cause all messages to be seen by each user. Our developer, Brite, is working to turn on that feature as of the date of this memorandum.

5) <u>Some email services actively block emails from the group</u>. This number has decreased though.

  a. The apparent issue with some users not being able to send or receive messages via email to Chatter had to do with signature lines and the email address associated with Chatters.

   i. Our developer has been able to fix the signature line issue. Many emails were being blocked due to some links and metadata stored in some user's signature lines. Brite was able to turn off the feature in Chatter that blocks those emails. Chatter assumes those types of emails to be spam or junk email and block them from being sent to the group. They were able to lift that security feature enough to allow typical signature lines to go through.

   ii. Many email services were blocked due to the email address associated with the Chatter messages. Many email servers blocked emails from being sent to or from that email domain. To fix this issue, the email address associated with Chatter was temporarily changed to my email address, mimoore@pdc.in.gov. This seems to have fixed the issue with some users.
   We have created a new email address, IPDCListserv@pdc.in.gov, which will be the email address associated with Chatter going forward. Chatter email messages should be coming from this address by the time of the board meeting.

Potential replacements for Chatter

There are a number of options available to use in place of Chatter should the Board choose to do so.

  1. Purchase an email server and host a listserve. This is not a viable option for a number of reasons:

i. The server would have be stored at the IPDC office or—more problematic—at an employee's home or office. We would be required to obtain permission from IOT to connect a free-standing server to the State's system in order to bring it online. IOT would likely not agree to allow a non-state server to be connected through the State's system. This means we would have to find a work-around just to bring the server online.

ii. IOT would not provide support for a non-IOT server meaning that the Council would be required to contract with a vendor to maintain the server and address all issues;

iii. While the costs of a server are nominal, there would be costs associated with maintaining the email server, purchasing a host email domain and paying the costs to maintain that domain's license, purchasing and maintaining security and privacy software; and,

iv. An email listserv, housed on a physical server, is an outdated technology, fraught with privacy and security issues, especially when it would likely have to be housed non-securely

2. Use Microsoft Teams. This was a solution offered by IOT when it notified us that it would no longer support the listserve servers. The same issues that are present with Chatter would be present with Teams.

3. Use an existing listserv service or group distribution mail list hosted by a university or Google. Each option brings its own security issues. In fact, Yahoo is discontinuing its Yahoo Group service effective 12/31/2020. In addition, each group requires a person with access to their service to create the listserv/email group and members must be manually added or deleted. They are not created to allow an organization to create a group. Moderators and administrators can be added, but the group account would be controlled by one person, not an organization. This means if the person is no longer eligible to have access, the entire group loses access.

4. Join a cloud-based email listserv service. There are a number of available for-pay listserv sites that could host IPDC's email listserv groups. The majority of them work similarly to how Chatter works, meaning they are intended to work as an online forum where discussion occur in the form of threads and files and messages are stored and archived for searching.

However, there are some online sites that offer listserv email services similar to the form of IPDC's former listservs. Some of these services are designed primarily as a method of email marketing and campaigning. However, each have an email distribution function that will work as an email listserv. Below is a table showing the number of members currently enrolled in each Chatter group. The table also shows the approximate costs for each service that was researched.

***Note, costs below are approximates and were calculated using online calculators provided by the various services online. I have not contacted any of these companies to obtain formal quotes and often online researched prices do not always align to actual costs once a sales representative is involved. There may be additional costs associated with migration and site orientation/training for staff.

Group	Number of Members	Wild Apricot	Gaggle	Mail-list.com	Simplelists
Adult Criminal Law	533				
Appellate Group	290				
TPR/CHINS	145				
Juvenile Defense	163				
Chief Public Defender	47				
Legislative	81				
DNA Defense	192				
Death Penalty	82				
Ask a Social Worker	21				
	1554 users	$480/month or $5,760/year	$1,605/yr if pre-paid or $1,926 if paid monthly ($160.50/mo)	$1,663 – $2,906/yr depending on which package chosen.	$300 per year

Recommendation:

Despite the issues noted by members, I would continue to recommend Chatter as IPDC's listserv service. There are several reasons:

1. Single source connected to our membership database. The Chatter groups membership is connected to our membership database meaning we use one source to add and remove members. When a member no longer qualifies as a public defender or other approved membership type, we change their status to "not active," which automatically removes them from any Chatter group.   Having a secondary location to have to add and remove members adds additional steps and individuals could be left in a listserv group after they no longer are eligible to be a member
2. One site for research of IPDC materials and Chatter messages. All Chatter message and files shared by members are stored in one location. If members log into to conduct research on the members' side, searches will return all relevant IPDC materials as well as any Chatter messages and member-shared files that are relevant to the person's search.

3. Customer support. The various for-pay listserv email sites have varying levels of customer support. The costs associated above include basic customer support which means all customer support will occur via FAQs and email support. Additional customer support may include additional costs. For example, Simplelist is a company located in the UK. Customer service is exclusively through email support.
   Chatter customer support includes support from Salesforce as well as community supported technical assistance and knowledge banks.
4. Costs. Chatter is included in our current membership services so there is no additional costs to use Chatter. Each online listserv site will include yearly charges.
5. Security. The for-pay sites are primarily intended for mass marketing emails, but can be used to support a group listserv. Security of email addressed and messages will be more difficult to ensure with some of the for-pay sites. This is based on the ease of finding information on each site, the level of customer support and whether the company is located within or without the U.S.