

Report on Association Management System (AMS) – formerly, the “Membership System”

Submitted by Terry Monroe

March 2008

Introduction

This report provides a description of action since December related to the membership system initiative. At its December meeting, the BoT approved the Business Rules in Membership System (BRIMs). The BRIMS document provides a framework for business rules which define ISOC member (individual and organization), chapter and staff interaction with the ISOC membership system.

Moving forward from BRIMs, we have developed a four-phase process for proceeding with the Association Management system project. The four phases of the project are:

Phase 1 (Needs assessment, member consult, develop RFP) – Underway – June 2008

Phase 2 (Issue RFP, seek bids, select vendor) – June – August 2008

Phase 3 (System Development) – TBD depends upon vendor chosen – OTS or Open

Phase 4 (Roll-Out and Implementation) - TBD

Each phase will include active consultation and collaboration with all stakeholders (members, chapters, staff).

We have begun Phase 1 of the project, having selected a systems architecture and development firm. This firm has experience in facilitating the complex processes that go into identifying and selecting ASM/membership system components, including experience with a full range of solutions (open source, proprietary systems, off-the shelf, and custom database solutions). In addition, they are very familiar with consultation and buy-in processes across multiple stakeholders.

Membership System to Association Management System

As became apparent during the work on BRIMs, addressing the membership system raises issues and practices that go beyond implications for the membership system and touch on the broader question of ISOC’s membership policy and other management and integration needs within ISOC. As such, we have initiated the next step in the review of ISOC membership policies and procedures. This will be done in the context of the Chapter Development program and we will incorporate into that review information already collected during our discussions with chapters and members regarding the business rules.

Further, in moving forward with this initiative, it became clear that it was necessary to incorporate other administrative and management needs across many different stakeholders. These include chapters, individuals, ISOC program staff (policy, education, standards and technology), organization membership, events, and finance as they have database/records/IT/mail/mail list needs that are best served by being fully integrated with the ‘membership system’. Those needs can be very broad, and in many instances, create interdependencies. Some examples of current and potential requirements include:

- Managing global and chapter memberships – locally and centrally
- Tracking customer relationship management (CRM) activities related to organization members, sponsors and contributors

- Consultation support structures and membership linkages – blogs, wikis mail lists, tied to membership and specific geographic and topical interests
- Events management and registration
- Member billing
- Grants/fundraising
- Integration with ISOC website and IT tools

Designed and implemented correctly, a new “Association Management System” will provide ISOC with the ability to enhance the experience of all members, to facilitate chapter management and to streamline and improve ISOC business processes. With respect to the latter, a goal is to integrate much of the data and automate certain processes that are difficult to perform, so that staff can view all or most information in one place, and reports can be far more comprehensive and insightful.

Next Steps

Below is a list of near-term steps to move forward with this initiative:

- Assign an ISOC Project team and Project leader – In-house guidance and project coordination is important to the success of this project. This team should draw upon personnel from the Membership department (Chapters and Organization Membership) and will also involve senior management, notably the CFO and the CEO. An overall Project leader will be appointed. Status: The Team is being finalized and both the team and the Project leader will be announced soon.
- Create a steering committee - Given that this initiative and the outcomes from it will impact numerous stakeholders within the ISOC community, we propose to expand the breadth of the working group (currently comprised of chapter delegate volunteers) to also include representatives from organization members, and ISOC staff (program and IT). The mission of the steering committee would be to provide guidance and support to the Project Team and consulting firm. Status: The Committee is being finalized and will be announced soon, chapter volunteers are already in place.
- Engage a Development Firm – This firm is responsible for working with the steering committee and with the ISOC project team to complete Phase 1 and 2 of the initiative. For Phase 1, the outcome would be a Summary of Requirements (SOR) document that identifies core functional needs and key processes. All stakeholders will be consulted and our goal is the highest level of buy-in possible. This document will also review a sample of systems developers, vendors and software solutions to determine where there is a good fit and to document potential gaps. This is not the RFP process, but rather a process that will allow ISOC to determine whether more detailed requirements are needed and the likely direction of the project’s next phase in terms of either selecting a specific solution and/or customizing an existing platform. It will help tailor the RFP and RFP process. Status: The firm has been chosen and starts first week of March.

This activity is of critical importance to ISOC and has the attention and support at the highest levels of the organization. It will continue to have the attention and support until it has been successfully implemented.