



**2019-2021 Member Services IT Subcommittee – Conference Call
Tuesday, October 13, 2020 – 1:00 pm-1:30 pm**

Staff Liaison: Lori Myers-Carpenter | | lmcarpenter@nahro.org
<http://www.nahro.org/content/nahro-member-services-committee>

Attendance:

Those on the call: Beverly Banks, Gary Centinaro, Eric Chubenko, Anna Judge, Jacob Oglesby, and Peggy Rice

Guests: Denita Johnson, Milet Hopping, Chuck Wellard

Subcommittee Chair, Beverly Banks welcomed everyone on the call and thanked them for sharing their time. She then turned the call over to Chuck Wellard, NAHRO COO, for an update on NAHRO's Association Management Software (AMS) journey.

Chuck provided the group with background on NAHRO's current AMS system, or database, saying they'd been with the same company for more than 15 years, and during that time, the system has been highly customized which causes problems when there are updates. He also said it's very expensive to maintain, and not user friendly, which makes it hard to do business in a modern way.

He said they started the AMS journey by evaluating the current system, what they liked and didn't like and what they hoped the new system could do. This information was then used to create the request for demonstration that was sent to vendors. Chuck mentioned their search had four phases. The first phase was to gather and document requirements for a new system. This was completed in August and included input from staff and various leadership. Phase two was to develop selection criteria and vendor surveys, which has also been completed, and he said they are currently reviewing the vendors who replied. The next phase is to review the vendor demos, which will start next week and go through November. During the demos, he said they are going to make sure the system can handle the dues structure and be able to incorporate a learning management system or LMS, which tracks professional development and certification. The final phase will occur in early December when they will select the system and enter contract negotiations. Once the system is in place, there will be a nine-month implementation process to clean up data and transfer it into the new system.

Chuck said the main things they are looking for in a new system is one that provides a good experience for the members, is easy for staff and members to use, and provides tools to track data. It also needs to integrate with other software they use and is easy to upgrade and has great value.

Denita Johnson asked if the system was like salesforce. Chuck said two of the vendors they are looking at are built on the salesforce platform. He mentioned they did a small sales force deploy for the professional development department earlier in the year.

Beverly asked about the training, wanting to know if it was just for staff or for external customers as well. Chuck said they are going to provide both.

Milet Hopping asked if the membership would have a chance to have any input on the selection or the set-up. Chuck said part of the plan is to include several members to review the system before it is made public, and he hopes the IT Subcommittee will be a part of this process.

Beverly asked if there was anything else to discuss, and staff asked the group to let her know if they were interested in being a part of the test group. Anna Judge said she was, and Beverly suggested they add the entire IT subcommittee to the list.

Hearing no other new business, the call ended at 1:30 pm.