

FACT SHEET

SAME Enterprise Management System (EMS)

As of 12 July 2022

1. Vision: Invest in, effectively implement, and sustain leading edge capabilities that enable greater member engagement; maximize volunteer time and resources; and maximize National Office productivity in the service of our members, stakeholders, and Strategic Plan.

2. Outcomes: When fully implemented (1 July 2023), the SAME EMS will (major outcomes):

- fully integrate and maximize the automation of all management functions;
- maximize one time entry of data, regardless of source;
- provide customizable reports (national, Posts, COI's, etc) that provide real time status;
- fully support membership growth initiatives such as operationalizing COI's (enable remote members and technical experts to more fully participate in SAME virtually);
- and provide a community platform for members to collaborate with their Posts, committees and each other.

3. Background.

a. Current Member Management System: Since 2006 the SAME association management system (AMS), ClearVantage or "CV", has been hosted by Euclid Technologies. The SAME national website and Post micro sites have been hosted by Euclid since 2015. Time has proven that CV is incapable of connecting with web-based forms and integrating with financial management and other third-party software and it is not user-friendly. As a result:

- SAME lacks an *integrated management system* that enables the national office, posts, and COI's to fully manage members, resources, and communications.
- SAME does not provide a convenient and easy way for members to join, manage their membership, and have easy access to fellow members, rosters, steering committees, task forces, and more with a single sign-on.
- National Office customer service is limited due to the high demand for database and web assistance and the inability to maintain enough CV expertise to respond.

b. SAME Membership and Dues Structure: SAME's membership and dues structure, especially the Sustaining Member (SM) structure, was unnecessarily complicated. During our early research in 2020 of AMS vendors and available platforms (Microsoft, Salesforce, Independent), every respondent to our RFP indicated that our structure required special programming, hence would cost significantly more.

c. XC and BOD Decisions: On 16 December 2020 the SAME Executive Committee approved the expenditure of reserve funds NTE \$1 million for the development and implementation of an integrated Enterprise Management System (EMS). In February 2021, in a separate but concurrent action, we began an initiative to simplify SAME's membership and dues structure. While this effort was necessary, its

timing was coordinated *to best facilitate the design of a new AMS*. The BOD ultimately approved the restructuring plan in August 2021. The most significant impact of that decision on both AMS development and member management was the elimination of the “SREP” in favor of the principle that every member has one record in the database and every member is an individual member with full rights and privileges. The Individual Member (IM) restructuring was implemented smoothly on 1 Jan 2022. The Sustaining Member (or company) restructuring is being implemented from 1 July 2022 through 30 June 2023.

d. National Office Decisions: Our first decision was to find a reliable and experienced expert to assist us through the entire process. On March 6, 2020 we contracted with Wes Trochlil, Effective Database Management, who is still supporting us. After a lengthy proposal phase, separately for both the AMS and CMS, we contracted on 1 March 2021 with NimbleAMS (Salesforce platform) for the AMS and Results Direct (WordPress platform) for the CMS. To achieve full integration of financial data with Nimble, in consultation with our finance and accounting partner CliftonLarsenAllen LLP, we chose Intacct, Bill.com (invoicing) and Tallie (expense management). Based on Nimble’s experience, we are also implementing supporting application programs that integrate well with NimbleAMS; Nimble assists in determining which applications are more cost effective as plug in capabilities.

4. What is the EMS? The SAME *Enterprise Management System* initiative is the most comprehensive overhaul of our entire management system undertaken in SAME history.

- The main components are the **AMS (member database)** , the **CMS (website)**, and **FMS (finance)**.
- **Supporting** components include third party software applications such as Open Water (for automated forms), Learning Management System (Big Marker, eShow), YM Careers (Member Career Center), and Events Management System (eShow).
- A **mobile App** will be another means of interfacing with the EMS. This is different from our SAME events App because it is a true 365-day App through which members can fully interact.
- The EMS includes all **policies, procedures, and standards** necessary to gain the maximum benefits of the system over time.

5. Technologies. The two best-in-class platforms that SAME is implementing are *Salesforce* and *WordPress*.

- **NimbleAMS** is a Salesforce-based product that is best in class. Think of Salesforce as Microsoft, while the NimbleAMS is like the Microsoft Office Suite. In turn, there is an App Exchange that has significant tools and capabilities that SAME will be able to implement over time.
- **WordPress** is a content-management system that is used by 43 percent of the top 10 million websites worldwide. Its calling card is usability for those creating and adding content; this should be appealing to Post webmasters who have struggled with the complexity of the existing SAME website. WordPress is open-source and continually upgrading, which will benefit SAME.

6. Implementation (Phase III) Timeline.

AMS: Phase I (Discovery) and Phase II (Design) are complete. Initial cleanup of existing member data has also been accomplished. Phase III (Implementation) is in progress. User Acceptance Testing (UAT) has begun to ensure all staff related functionalities are working. The migration of data from CV to NimbleAMS is also in progress and CV will shut down on 10 August; staff live training is 11, 12 August; and NimbleAMS “Go Live” occurs on 17 August. Upon verification of staff functionalities, training and testing of functionalities to support members, Posts, COI’s and other integrated requirements will be scheduled. This phase will continue through June 2023. Specific schedules will be announced and coordinated with appropriate audiences (Posts, COI’s, etc.) well in advance.

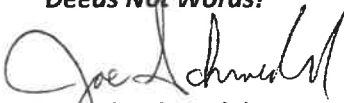
CMS: Concept Design of the website framework is complete. Nimble recently provided the necessary technical requirements to Results Direct to support integrated programming the framework. By March 2023, the expectation is that all web pages (national and Post) will be transitioned to the new framework by in house SAME staff. CV will continue to support national and Post websites in their current form but tied to the new database until the new web pages are developed. Additional national site pages also may remain on the existing platform, depending on how long design and content placement takes. At minimum all pages where SAME needs to be ‘open for business’ will be functional on 17 August. The **mobile App** is being developed with implementation envisioned for 2023.

FMS: Intacct (replaced Dynamics) and Bill.com (invoice mgt) have been implemented. Tallie (expense mgt) is next. Financial integration of eShow and NimbleAMS will occur next year.

Supporting Applications: Open Water and YM Careers have been implemented as stand-alone capabilities. For example, national camp applications were easily completed and more effectively managed in 2022 utilizing Open Water. Likewise, 2022 Streamer submissions were accomplished utilizing Open Water. These applications will be fully integrated into the EMS *beginning* on 17 August. Other applications will be selected, implemented, and integrated into the EMS over time to continually improve the system, achieve our EMS vision and deliver our Strategic Plan.

7. Impact. Through this historic, comprehensive effort, we are laying a foundation for the long-term integrated management of members, stakeholders, resources, and requirements to achieve the impact defined by our Strategic Plan. The EMS will allow us to more fully achieve our National President’s charge to ensure others believe that they can always “Count On Us!”

Deeds Not Words!


Joseph Schroedel
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Executive Director

Count on Us! *to Deliver!*