The AMS Question

How to Decide if Association Management Software is Right for Your Organization

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pharmacists advancing healthcare®

Presenter

Maari graduated from North Dakota State University (NDSU) College of Pharmacy, Nursing and Allied Sciences in 2010 and completed her Post-Graduate-Year-One Pharmacy Practice Residency at Sanford Health Medical Center – Fargo in 2011. Maari is a Board Certified Pharmacotherapy Specialist and obtained her Master in Business Administration from NDSU.

Maari is a pharmacist at Sanford Health Medical Center – Fargo. She worked as a Critical Care Pharmacist until 2012. She continues to be a pharmacist at the medical center and works closely with the Critical Access Hospitals within the Sanford Health Network.   Maari is involved in Research Pharmacy, Medication Safety, Electronic Medical Record implementations, orderset development, and precepting pharmacy students and residents.

Maari is an active member of the North Dakota Society of Health System Pharmacists and is currently the Member-at Large, the North Dakota Pharmacists Association, and the American Society of Health System Pharmacists. Elevating pharmacy practice within Sanford Health, North Dakota and this region is a passion for Maari. Strong and consistent pharmacy services within a hospital or health system are an important building block in the care of each patient.

She and her husband Phillip live in Fargo and have two children, Mabel and Jalen. In her spare time she is involved with her church, plays oboe in the worship ministries orchestra, takes walks with her kids, and enjoys working on crafts/projects/anything that is creative that can be used in her home or for her family and friends.

Dr. Maari Loy, PharmD, BCPS, MBA

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Presenter

Elyse MacDonald joined the University of Utah Drug Information Service in July 2012. In her current role, she helps manage ongoing drug shortages, supports the pharmacy and therapeutics committee and formulary management, incorporates medication safety improvements, precepts students and residents, and is a voting member of the University of Utah Institutional Review Board. Her current pharmacy interests focus on drug information practice, drug policy, medication safety, and research pharmacy.

Dr. MacDonald earned a BS in Biochemistry from Cedar Crest College located in Allentown, PA. She earned her MS in Pharmaceutical Chemistry from Lehigh University located in Bethlehem, PA. She received her PharmD in 2008 from Creighton University School of Pharmacy and Health Professions. She completed her Pharmacy Practice Residency at the Philadelphia VA Medical Center in June 2009 and completed her Drug Information specialty residency at University of Utah Health in June 2010. After completing her PGY2 DI residency, she worked for Intermountain Medical Center (IMC) as a drug information and medication safety pharmacist. She also coordinated the Investigational Drug Service at IMC. Prior to pharmacy school, Dr. MacDonald worked in the pharmaceutical industry as an analytical chemist and then as a project leader in clinical supplies.

For 2017-2018, Dr. MacDonald was appointed as a member of the ASHP Commission on Affiliate Relations. Previously, she has been a member of ASHP SCSS Section Advisory Group on Emerging Sciences. She also served as a network facilitator for Pharmacoeconomics and Drug Policy Development. She is currently the President of the Utah Society of Health-System Pharmacists. She served as a Utah delegate in 2016 and 2017 and as an alternate delegate in 2015 for the ASHP House of Delegates.

Dr. Elyse MacDonald, PharmD, MS, BCPS

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What Is an AMS?

- **Association Management Software (AMS) allow organizations to manage all aspects of their member operations in one place**

Types of Systems

- **SAAS – Software as a Service**
  - Your solution is hosted "in the cloud" and accessed via the Internet
- **Enterprise**
  - Your organization buys software and installs on it on your servers

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Traditional Modules Found in an AMS

- **Membership management**

- **Website/CMS**

- **Event Management**

- **Financial Management**

- **Email/Communications**

- **Mobile App**

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Selecting the Best System

- **Complete needs assessment**
- **Do your homework: Compare at least three different systems against real-word scenarios**
- **Seek input from ASHP or other State Affiliates**
- **Consider hiring a skilled, experienced database consultant**

Determine Your Needs

- **Determine what features/elements are <u>critical</u> for your organization**
  - Membership Management
  - Event Management
  - Education
  - Products and Services
  - Social Media/Online Community
  - E-commerce/payment processing
- **Determine Initial and ongoing budget impact**

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Options for State Associations

- **MemberClicks (www.memberclicks.com)**
- **MemberMax (www.membermax.com)**
- **StarChapter (www.starchapter.com)**
- **Tendenci (www.tendenci.com)**
- **Yourmembership.com**
- **Wild Apricot (www.wildapricot.com)**

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Resources

- **ASHP ARD staff (Kimberlee Berry)**
- **ASAE (www.asae.org)**
- **Idealware (www.idealware.com)**
- **reviewmyams.com**
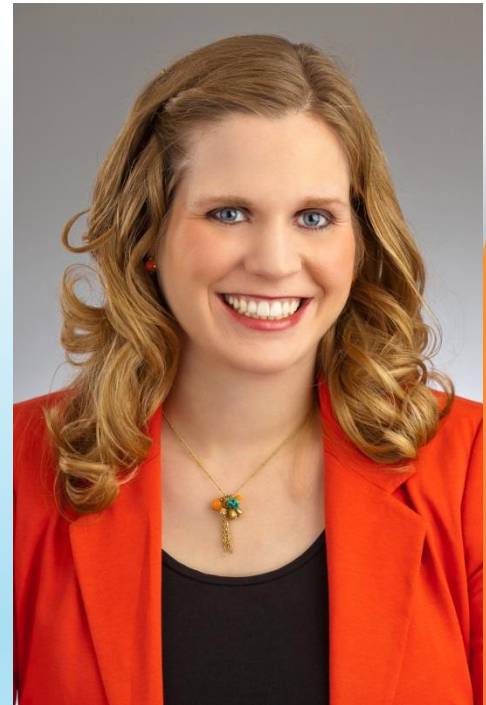- **Capterra.com**
- **Onlinecommunityresults.com**

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Association Management Software Tools

Maari L. Loy, PharmD, BCPS, MBA

North Dakota Society of Health-System Pharmacists

Member-at-Large

North Dakota Society of Health-System Pharmacists (NDSHP)

- **Mission:**

NDSHP exists to elevate health-system pharmacy practice and patient care in our region through advocacy, innovation and member support.

- **Vision:**

To provide leadership that inspires optimal medication use for every patient, every time.

Crossroads

- **History**

- **Challenges**

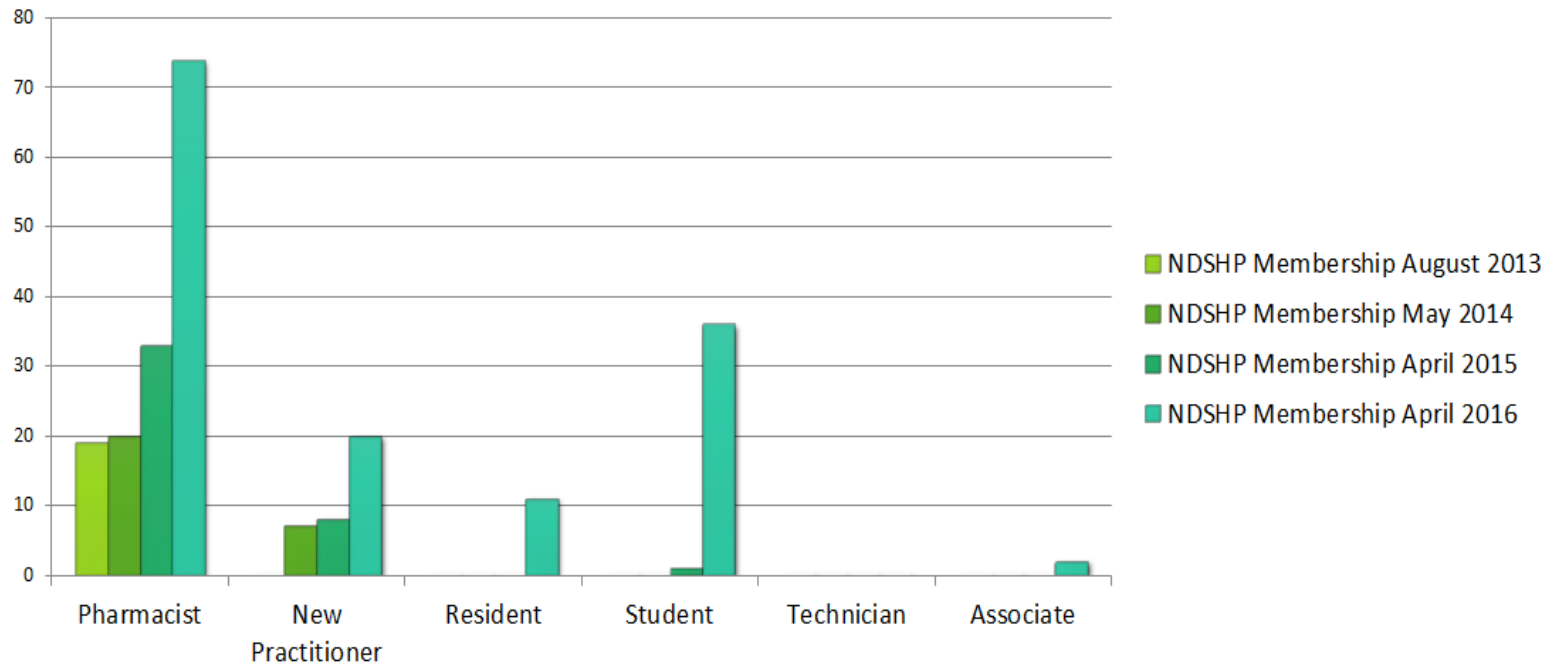- **Identification of the need for an AMS tool**

Membership

Membership Level	NDSHP Membership August 2013	NDSHP Membership May 2014	NDSHP Membership April 2015	NDSHP Membership April 2016
Pharmacist	19	20	33	74
New Practitioner	0	7	8	20
Resident	0	0	0	11
Student	0	0	1	36
Technician	0	0	0	0
Associate	0	0	0	2
TOTAL	19	27	42	143

Membership

Our Face

Activity

- **Monthly Meetings**
  - Networking
  - Education
- **Annual Summit and Expo**
- **Annual Convention**

Why an AMS?

- **Restart our organization**
- **All volunteer**
- **Volume of requests**

Which AMS?

- **Reviewed options, functionality**
- **Cost**
- **Board approval**
- **No middle-person**

AMS Tools

- **Webpage**
- **Membership management**
- **Event management**
- **Communication**
- **Donations**
- **Finances**

Lessons Learned

- **Delegate, allow multiple users access to pages and functionality of administrative privileges**

- **Membership management first, then add functionality over the years – doesn't have to be big bang**

- **Multi-task AMS maintenance – save time**

Elyse MacDonald, Utah Society of Health-System Pharmacists

AN AFFILIATE PERSPECTIVE

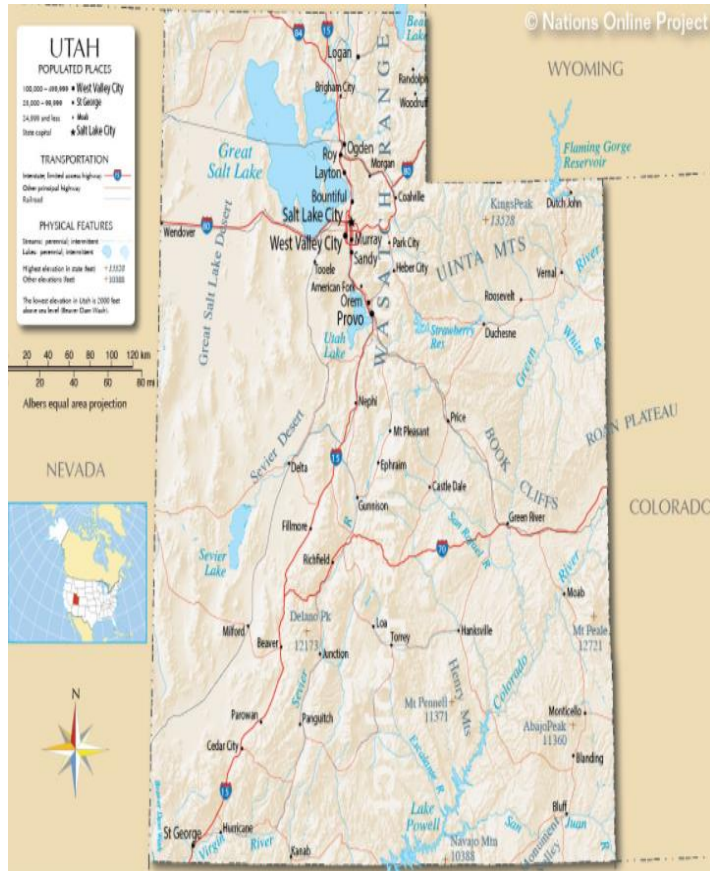# Choosing an Association Management System: The USHP Way

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Utah

http://www.nationsonline.org/oneworld/map/USA/utah_map.htm
http://www.glennrandall.com/delicate-arch-and-the-la-sal-mountains.html
https://www.flickr.com/photos/utahimages/9271781366

USHP Mission

To advance public health by promoting the professional interest of pharmacists practicing in health systems through the following:

1. Developing professional standards for patient care.

2. Fostering an adequate supply of well-trained, competent pharmacists, pharmacy technicians, and pharmacy interns.

3. Developing and conducting programs for maintaining and improving the competence of pharmacists, pharmacy technicians, and pharmacy interns.

4. Disseminating information about patient care and safe and effective drug use.

5. Improving communication among pharmacists, other healthcare professionals and the public.

6. Promoting research in the health and pharmaceutical sciences and patient care.

7. Advocating safe and effective medication use within health systems and the community.

8. Advocate for laws, regulations, and standards that improve patient care.

USHP Information

- **Committees**
- **Program events**
  - Annual meeting (August)
  - Midyear meeting (February / March)
- **Membership**
- **Staff**
  - ACPE coordinator
  - Webmaster

Prior to AMS

- **WordPress website**
- **Functionality**
  - Registration for program events
  - Payment for program events and membership
  - Log-in access for "member only" and program materials
- **Issues**
  - Problems with log-in functionality
  - Could not run reports for membership or meeting registration information

Desired improvements

Tracking – program events, membership

Restrict access – board, members

Automation – e-mails

Selection Process

Evaluated 3 different AMS

⬇

Prepared presentation

⬇

Discussed pros and cons of each AMS

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Recommended an AMS

Transition to AMS

- **Rebuild the USHP website from scratch**

- **Re-evaluate our content**
  - Review yearly by communication committee

- **Overall – went well**

Challenges in transition

- **E-mail aliases associated with website**
  - Separate e-mails for our committees and board
  - Need to use a separate e-mail service
- **Membership cycles**

Transition lessons

Optimize use of the AMS

Evaluate functionality

Benefits of AMS to USHP

- **All board members have "read-only" access**
- **Membership and program event registration coordination**
  - Program registration tied to membership type
- **Coordination between website and payment portal**
- **Communication with memberships made easier**
- **Board forum functionality**
- **Platform ease of use (once it is set up!)**

Tips to Pick an AMS

Due diligence to pick the AMS that best fits the needs of your particular affiliate

Transition during a "down time"

Questions

Association Management System Needs Assessment

The first step of an AMS implementation should include an assessment of its AMS needs and a listing of the requirements the new system must meet. Your organization should clearly identify the project's objectives, its scope, and how it will be managed. Project objectives identify the high-level functionality of the AMS—what the AMS needs to do for the association. The scope is a detailed description of what is to be included in the project (and, just as important, what is not included).

To make sure you find the AMS that best fits your organization, you should always consider the following:

- **Who's involved?** Which staff/volunteer members will be using the product regularly? These people should be involved in the decision.
- **How long will it take?** Define a reasonable timeline for evaluating, implementing and launching the new system. Be sure to take any upcoming events, membership drives or renewal periods.
- **What do you need?** What, specifically does your organization want in an AMS? Message boards, event registration, dues payment and renewal — consult with the organization's administrators to determine what your must-have and wish-list items are.
- **What can you afford?** The right AMS can save you money in the long-term, and be sure to take into account the new revenue streams — such as sponsorship or job board revenue — a new AMS can provide.
- **Who's out there?** Learn about the different vendors and the products each one offers. Check with other associations for recommendations or run an online search. Some keywords are "membership management software" or "association management software."
- **Talk to the vendors.** Reach out via phone or e-mail to different providers to discuss your needs and options.
- **See it in action**. Most providers provide online demos so you can see the product for yourself. Be sure to include the people in your organization who will be using the software directly.

AMS Features Checklist

Check each featured desired in an AMS. Then rank the selected features in order of importance (one being most importance) to your organization.

Feature	Desired	Ranking
Membership Management (database)		
Event Registration		
Invoicing/Payments/Accounting		
Web Design & Hosting		
Members-Only Access		
Email distribution/templates		
File Storage		
Multiple Account Administrators		
Analytics/Reporting (membership, events, accounting)		
Tech Support from provider		
Social Community(i.e. ASHP Connect)		

Notes:

AMS Provider Evaluation

Vendor Name:

Provide details from each AMS provider on separate forms then review the results of the evaluation with committee or board.

What is the basic "package" Price?	
What add-ons might your organization need?	
What is the cost of each add-on?	
What is included in the setup?	
What does the implementation process entail, and how long does it take?	
Are product updates included or must you upgrade the software to receive updated features?	
How often is the product updated?	
What technical support and training is included and what are those charges?	
How secure and reliable is the software?	
What additional hardware or software is needed for installation?	
How many admin licenses are included?	
Who hosts the software?	
Who owns the data and website, the client or the vendor?	
What are the terms of cancellation?	
Does the vendor use stock templates or custom design for websites?	
How is payment processing handled?	