

# Association Management System (AMS) Implementation

Update  
March 11, 2020

# Agenda

- Project Update
- Data Governance
- MA Focus Group Update

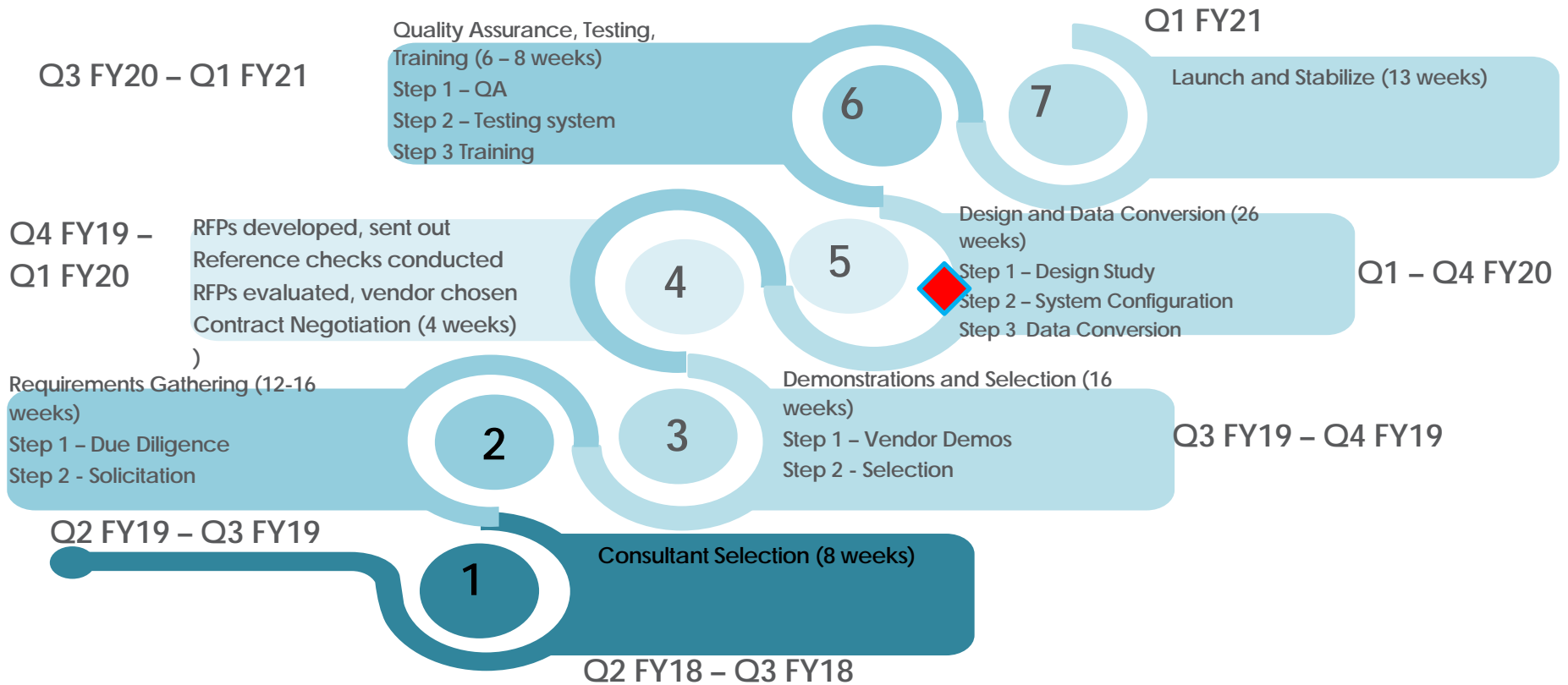


# Project & General Timeline

Phase	Weeks	Begin	End
1. Discovery	8	December 2019	January 2020
2. Design	8	February 2020	March 2020
3. Implementation Contract Negotiation	2	March 2020	April 2020
4. Data Mapping and Conversion	26	February 2020	November 2020
5. Quality Assurance and Testing	25	May/June 2020	October 2020
6. Training	3	October 2020	October 2020
7. Launch and Stabilize	13	November 2020	
8. Design and Delivery of Remaining Contract Items	36	January 2021	June 2021



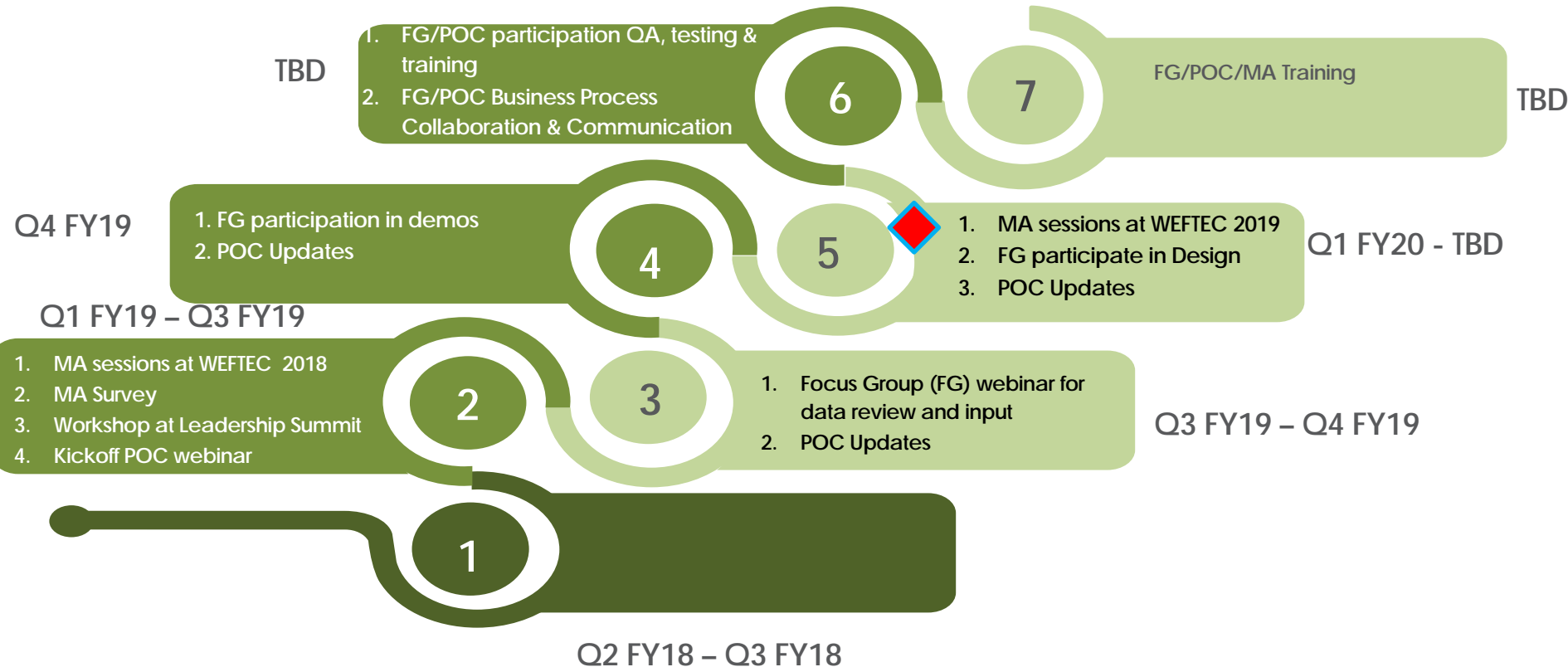
# AMS PROJECT SUMMARY TIMELINE



 WE ARE HERE  
PHASE 5



# MA-AMS PROJECT SUMMARY TIMELINE



 WE ARE HERE  
PHASE 5



# MA Focus Group Members

Angie Monteleone – Alaska

Heather Tyrell – Ontario

Janice Moran – New England

Jim McElvouge – Iowa

Josh Muskopf – Oklahoma

Kathryn Yusko – Michigan

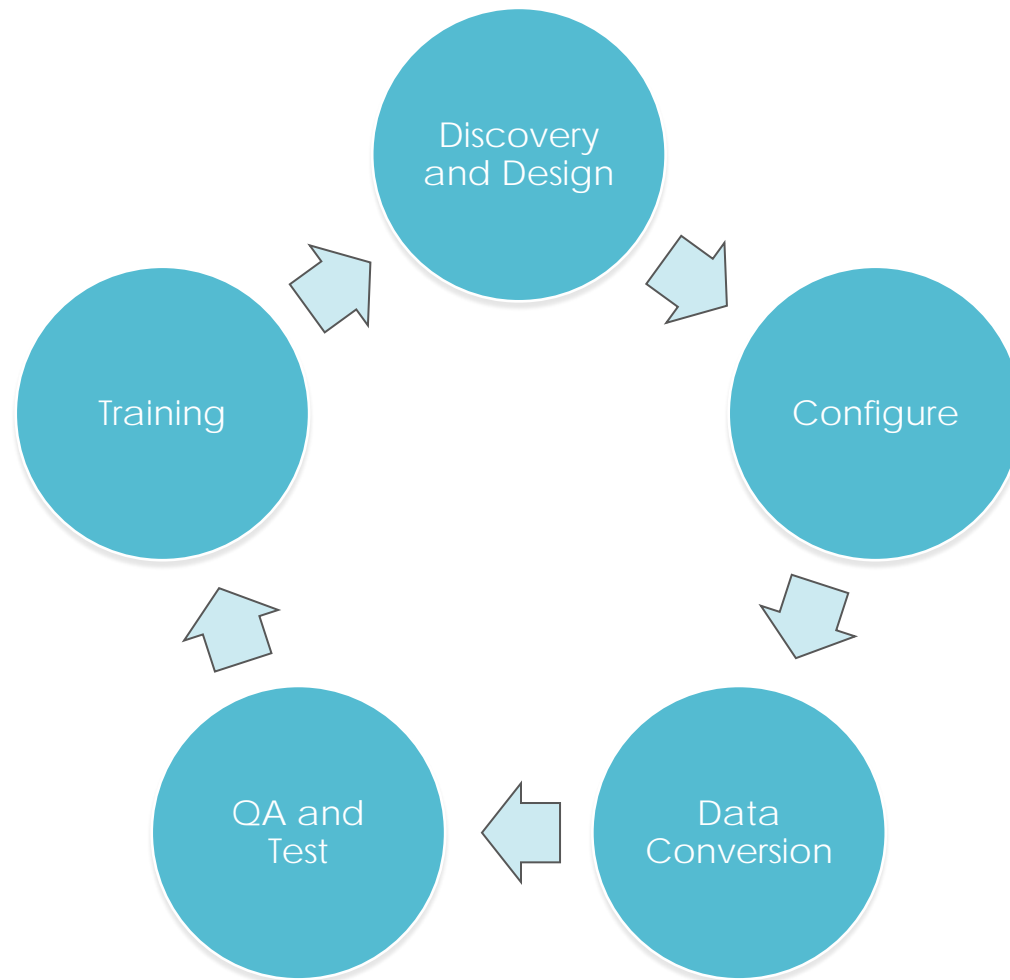
Sue Boynton – Pennsylvania

Melissa Sansing - Texas

# Vendor Design Study

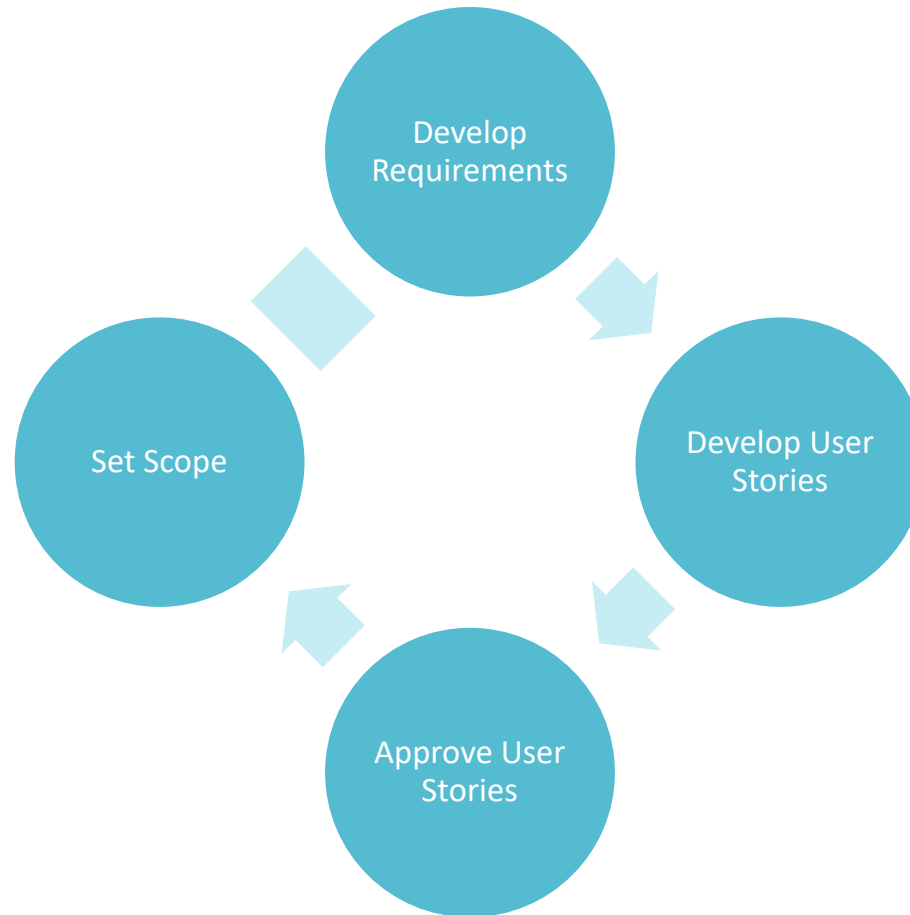


# AMS Implementation

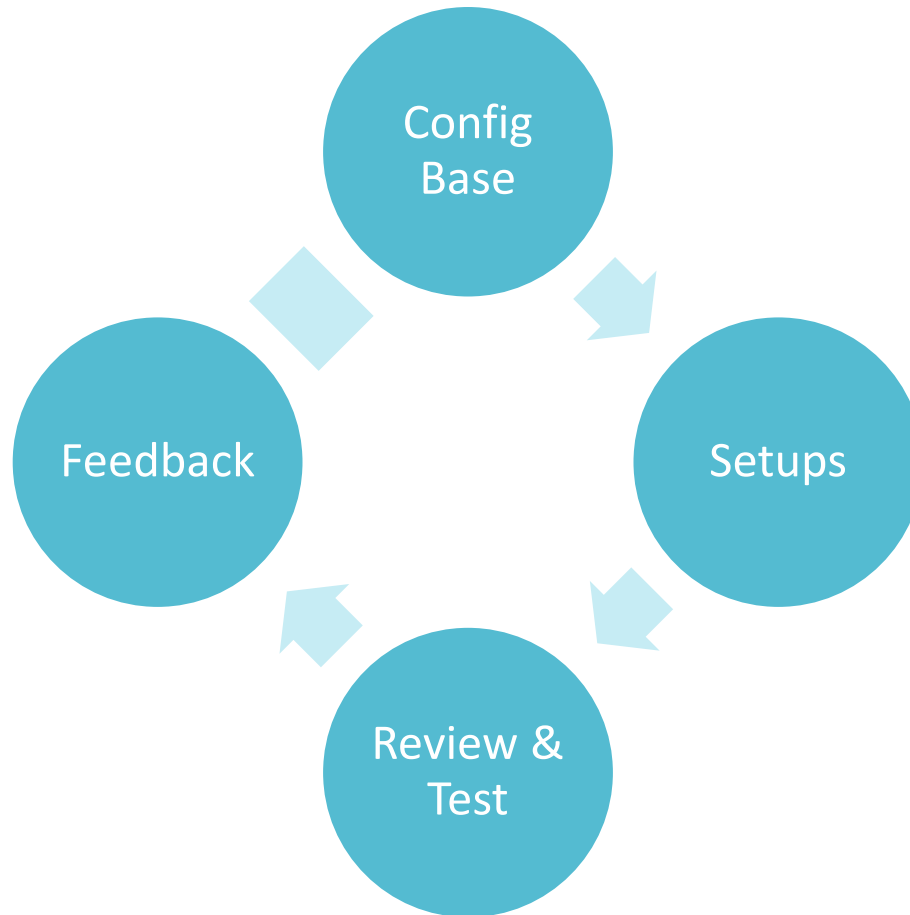




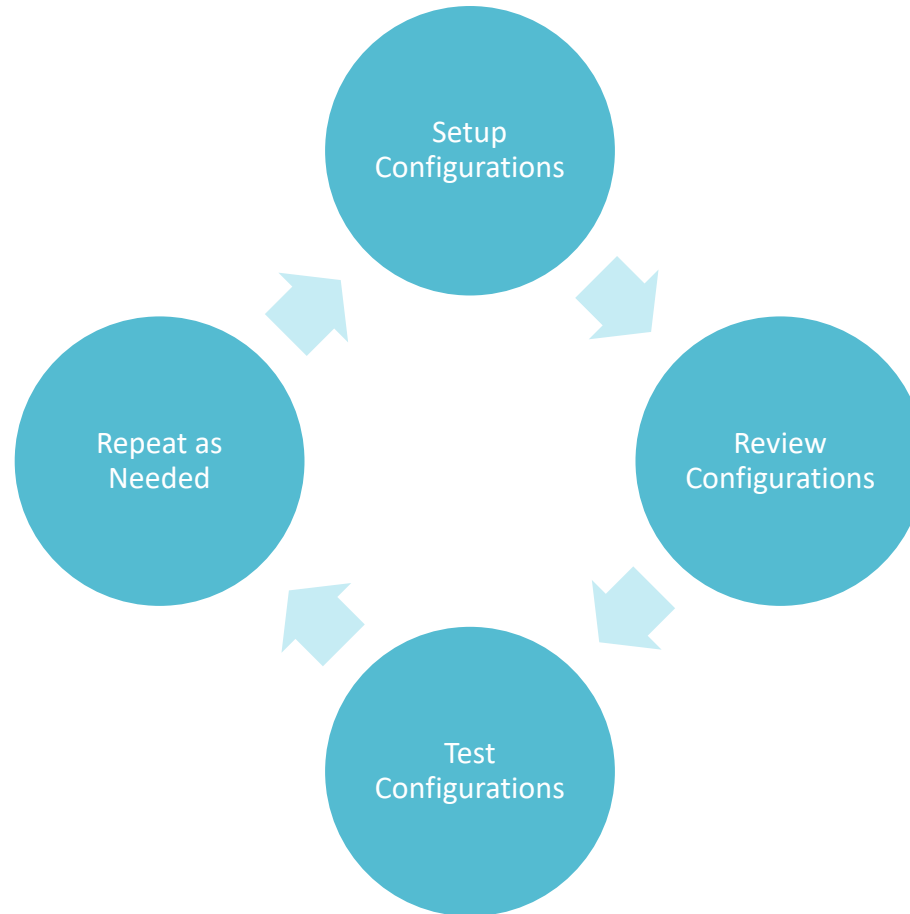
# Discovery



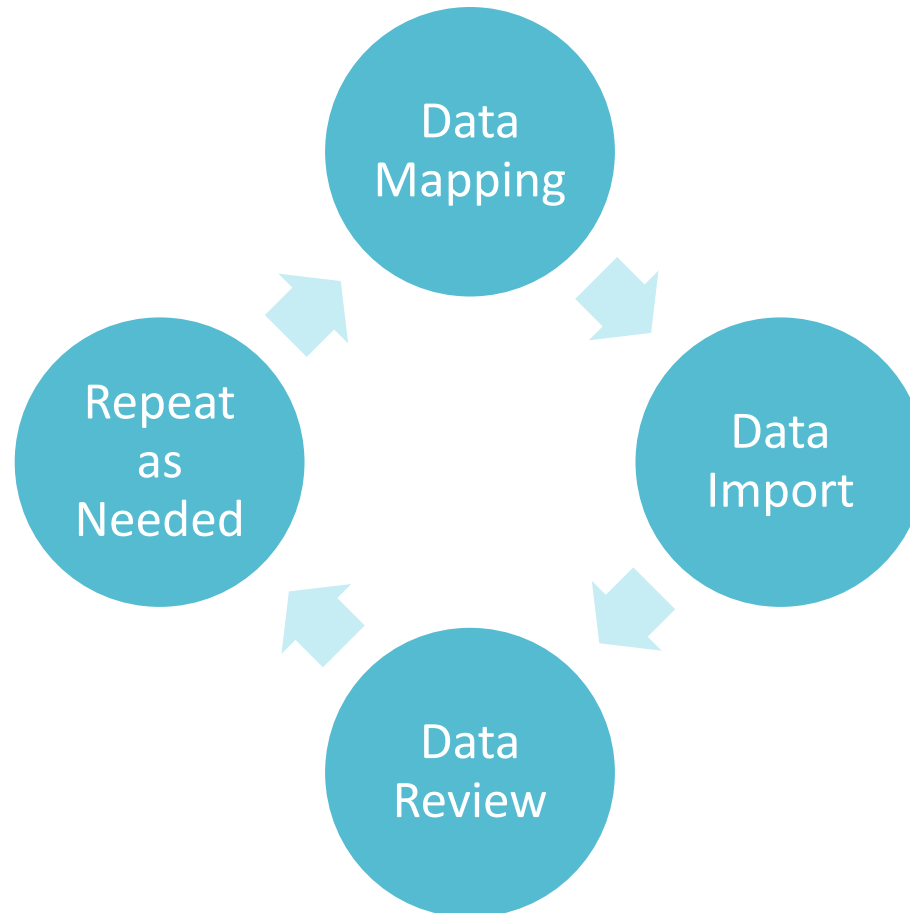
# Design



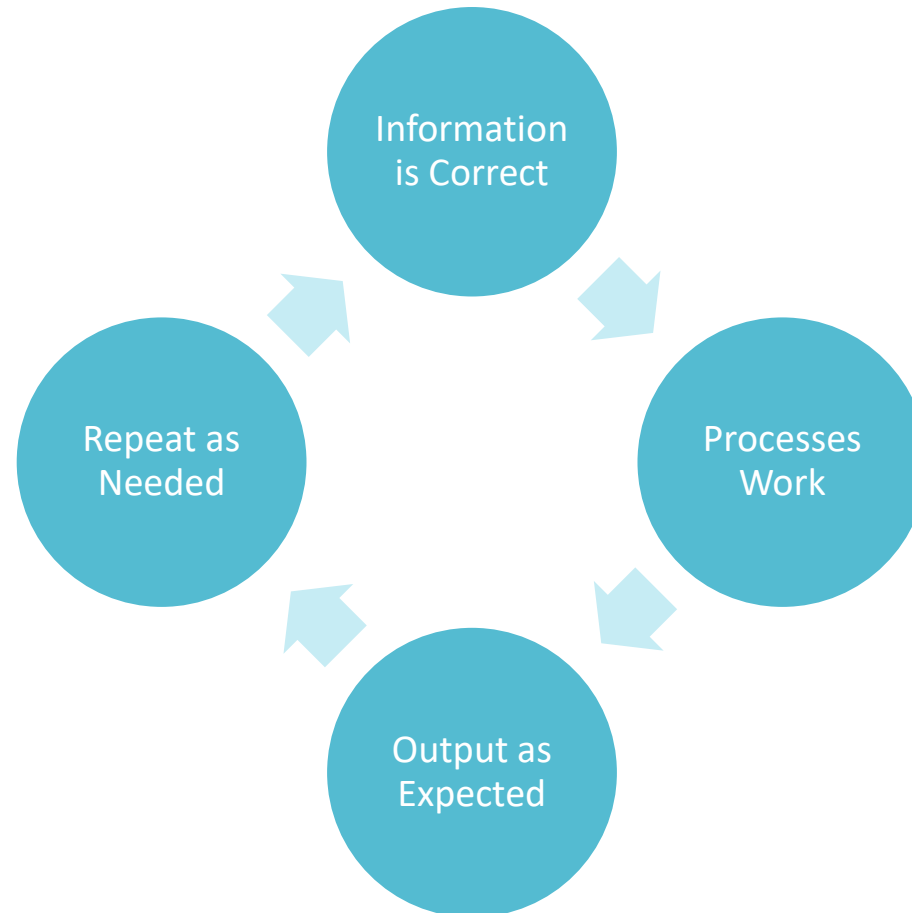
# System Configuration



# Data Configuration



# Quality Assurance and Testing



# Training

Train Key WEF Staff

Train MA Focus Group

Train All WEF Staff who use AMS

Train Representatives from MAs

# Launch and Stabilize

- Launch with core set of requirements
- Celebrate our success!
- Allow system to stabilize for at least **90 days**
- Ongoing training

# Mutual Goals

- Improved customer experience
- Standardization for data entry and processing
- Improve communication between WEF and MAs





# What is Data Governance

A core process to manage the issues and risks related to association data

Quality

Security

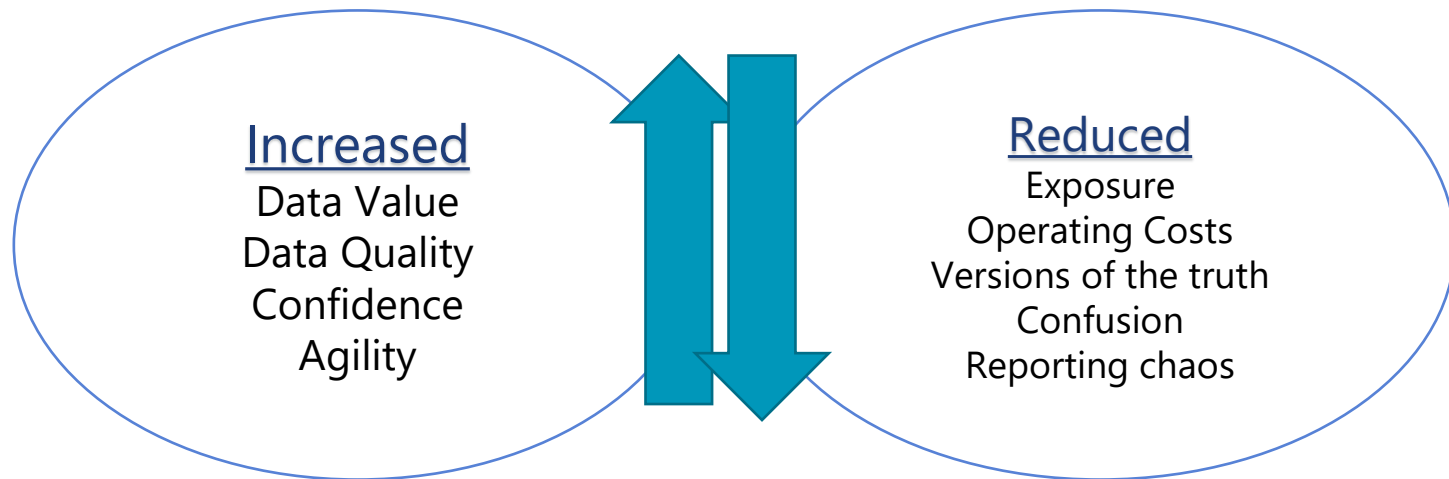
Definition

Ownership

Usage

Collection

# Benefits of Data Governance





# GDPR and CCPA

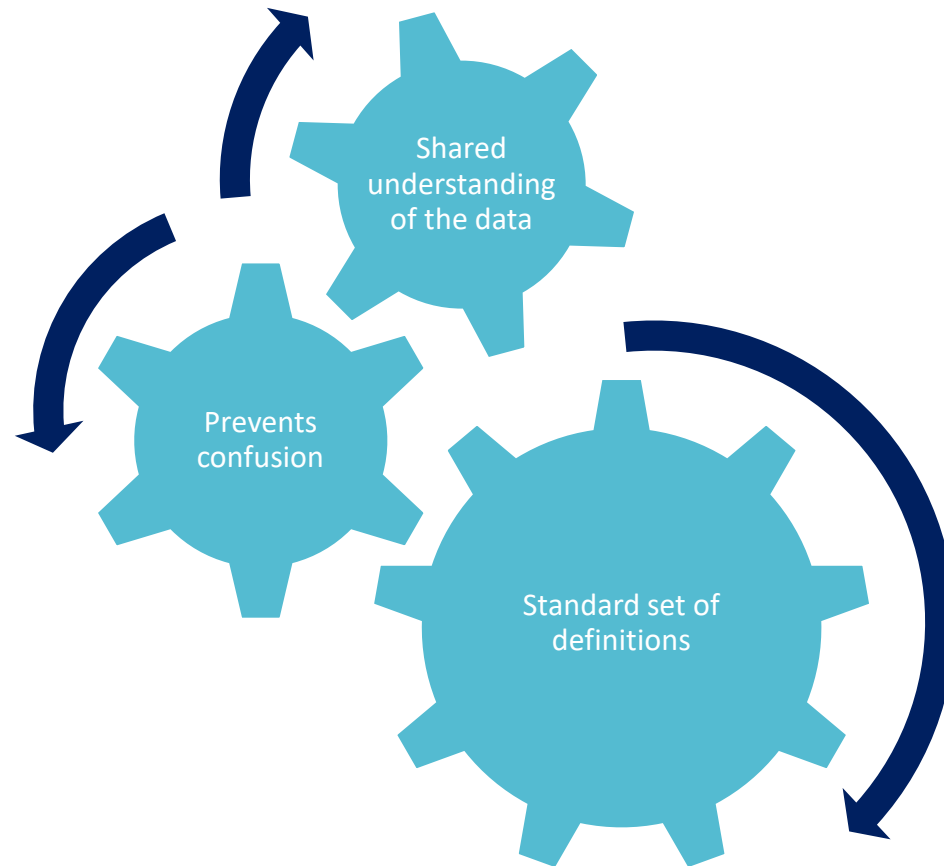
## General Data Protection Regulation (GDPR)

- All countries who have customers in the EU
- Began May 25, 2018
- Most stringent data protection requirements in the world

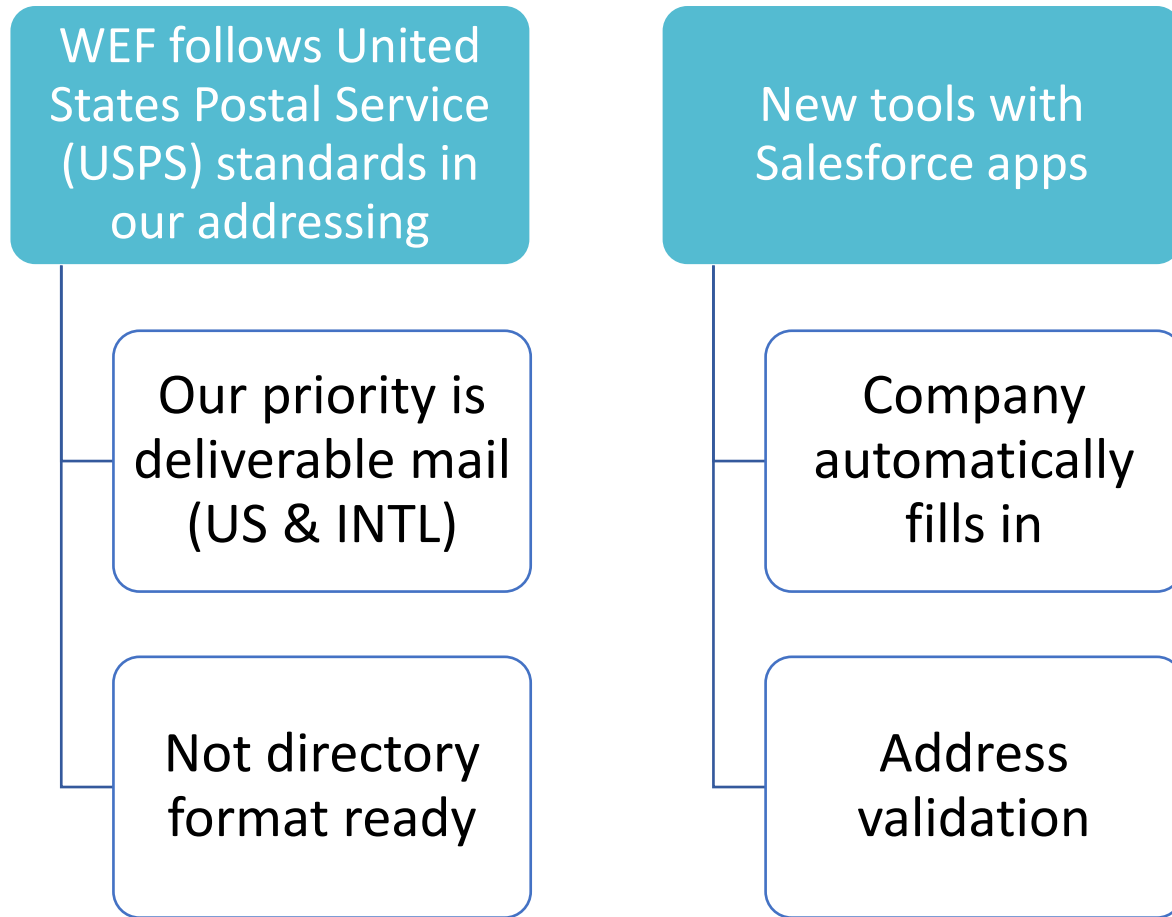
## California Consumer Privacy Act (CCPA)

- Many of the GDPR rights (know, delete, opt-out)
- Began January 1, 2020
- 501(c)3 are mostly exempt

# Business Glossary



# Addressing Standards





# WEF Financial Process

WEF pays MAs first before paying WEF dues, unless payment is zero

WEF absorbs all CC fees where the member pays dues

WEF rebates all monies received for MA dues for prior month-end close

WEF rebates dues by the 10<sup>th</sup> business day of the next month

WEF reconciles MA dues before we send payment. We request that the MA verify monthly and inform us of any issues

# MA Financial Process

MA notifies WEF if they receive a payment for MA dues so WEF can update or records

MAs keep their websites and paper forms current with both WEF and MA dues rates

MAs using Fonteva as their AMS will follow established standard financial practices

MAs using Fonteva must have their own CC processing merchant for any monies they process on their end



# Operation Standards

Members on  
Committees

Member  
Transfers MAs  
during a term

UPP  
Challenges



# MA Committees

WEF is implementing a Fonteva global feature that defaults to WEF members on committees. Expired members will be automatically removed

For those MAs who will use Fonteva as their MA Management system only shared WEF/MA and MA only members can be on MA only committees. The system won't allow the addition of non-members



# Transfer MAs during Membership Term

WEF does not refund or apply a credit for previous MA. Member must contact MA to request a partial refund

WEF will prorate new MA dues from time notified till end of current membership term.

MAs that do not accept partial payment of dues will contact member

# 30 day Cancellation and Fraud

WEF has a 30-day cancellation policy. If a member cancels during that time, all monies we collect are refunded

Some WEF books are frequently the targets of fraud. Sometimes the perpetrators of the fraud will join WEF and the MA. Once the fraud is identified, WEF writes off the membership and if rebate has been remitted, collects back from MAs

# UPP Challenges

UPP's synchronize to a consolidated billing cycle for all members

WEF must prorate both WEF and MA dues to accommodate this feature

# Fonteva Advantages

SalesForce platform and allows WEF/MAs to take advantage of other apps for specific tasks

- Address checking and validating
- Duplicate identification
- Data augmentation

Less manual processes, more dynamic workflows and flexibility

WEF Member lookup

- Designated MA staff/volunteers will have access to an area where they can lookup and validate WEF membership

# Fonteva MA Platforms

- MA Partner Portal – a web portal where the MAs can manage their shared memberships and generate MA/WEF reports.
- MA Management System – For those MAs who are using Fonteva as their AMS and require additional functionality

# MA Partner Portal

Real time data access and reporting

Ability to access account/contact information for WEF/MA shared members

Ability to create accounts/contacts

Ability to pay both WEF and MA dues

Ability to make contact information changes to the account/contact

Ability to view current and past payment information and see all MA financial transactions

# MA Management System

Manage MA only and WEF/MA members

MA online join/renew/register

Create and register people for MA events

MA only committees



# MA Focus Group Workshop February 18-20

Group was diverse in membership size, volunteer and staff

- 2 volunteer leaders and 6 staff
- 2 large, 3 mid-size and 3 small

Group spent time listening to each other and to WEF to identify and understand what the needs and issues are.

Group made recommendations for reports and data governance procedures

# MA Data Transfer Report/API

Fields to be removed  
as recommended by  
MA Focus Group

- Address 3
- Address 4
- Business Fax
- Committee Flag
- Education Code (WEF is no longer collecting)
- Employer Code
- Position Code
- Concentration Area Code (WEF is no longer collecting)
- Sponsor Name
- Bad Address Date
- Key Focus Areas
- Order method Code

# MA Data Transfer Report/API

Fields to be added  
as recommended  
by MA Focus Group

- Work Email
- Home Email
- Other Email
- Primary email flag (values are work, home or other)
- Ethnicity

# Reports

## System Launch

- Data Transfer (formerly Data Dump)
- New Rebate
- UPP
- Expired Members
- New Members

## First Month

- Address Change (make EXCEL and add email)
- Member License

## Later

- WEF Committee
- Formatted Member Roster

## No longer needed

- Email report
- Demographic



# MA Focus Group Thoughts



# Questions

# Next Immediate Steps

- Continue working with MA Focus Group on Data Governance rules and standards
- Fonteva finalize Discovery Phase
- Fonteva continues Design Phase
- Updates to MA Focus Group and Points of Contacts
- Fonteva demos with Points of Contact once our sandbox is configured with our data