Case Study:

UNIVERSITY RISK MANAGEMENT & INSURANCE ASSOCIATION

Lessons Learned from the University Risk Management & Insurance Association

The configurability of MemberSuite allows the University Risk Management & Insurance Association to easily make major changes to their complex individual and organizational membership model, registration forms, member portal, 360-views, and more. With MemberSuite, revenue generation and collection has improved along with staff productivity.

"MemberSuite is better than customizable because it's configurable. My colleagues made a wise decision moving to a supported and configurable system like MemberSuite. We didn't have to pay thousands to customize an AMS, and we're no longer reliant on a single person for all our data needs."

- Ronna Papesh,
Website & Database Administrator

About University Risk Management & Insurance Association

URMIA 50TH ANNIVERSARY
UNIVERSITY RISK MANAGEMENT & INSURANCE ASSOCIATION

The University Risk Management and Insurance Association provides resources and professional development that helps colleges and universities protect their reputation and resources, both human and financial, through the incorporation of sound risk management practices into all aspects of their operations.

MemberSuite's Configurability: a More Sustainable Solution than Customization

Challenges

For many years, the team at the University Risk Management & Insurance Association (URMIA) used a custom-built member database that was tailored to their specific needs. However, staff leadership was concerned about their reliance upon one IT person's technical expertise to manage and maintain the database.

Ronna Papesh, Website & Database Administrator, wasn't working for URMIA at the time but she heard about the search for a more sustainable solution from colleagues who were involved. At first, they implemented "very canned" membership software, but that only lasted about 3 years because it didn't fit URMIA's needs.

Because URMIA had a good partnership with their online community provider, they sought advice about new association management software (AMS) from one of the company's executives.

He asked questions "my colleagues didn't even know to ask" and suggested they put MemberSuite in the running.

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Solutions

Ronna said URMIA chose MemberSuite because:

"Other AMS solutions were ridiculously priced for a small association, and we could afford MemberSuite. One of its major selling points was its support of both individual and organizational memberships. We needed a system that would allow organizations to buy memberships and have benefits flow down to individuals. We can't do business without that ability."

URMIA also chose MemberSuite because it was more customizable than their interim AMS. However, they didn't customize it as they anticipated. Instead, Ronna put MemberSuite's configurability to work.

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MemberSuite. We didn't have to pay thousands to customize an AMS, and we're no longer reliant on a single person for all our data needs."

When Ronna came on board at URMIA, she explored MemberSuite's configurability options. "For example, I tailored the member portal forms to better meet our members' needs."

She made configurations for the staff's benefit too. "They like the flexibility and many configuration options in building registration for events both big and small. I also made changes in the administrative 360-views. Some fields were hidden or on a different tab, and I put them front and center."

"We're happy MemberSuite is a configurable system that lets us turn switches on and off to meet our business needs."

MemberSuite's Flexibility Allows URMIA to Restructure their Membership Model in Response to Market Needs

"One of the things we love about MemberSuite is how it stores individual records separately from organizational records. You can use relationships to tie them together in many ways. Relationships can mean different things, for example, certain benefits can happen automatically for a specific type of relationship."

The flexibility of MemberSuite's membership module made a huge difference two years ago when URMIA's board changed the membership structure. URMIA now can offer:

- 7 tiers of institutional memberships with each tier having a specific number of individual members included in the membership, and varying dues depending on the type of institution—two-year institutions pay lower dues than four-year institutions.

- 2 tiers of business organization memberships.

- Voting and non-voting roles for employees of member organizations.

- Individual (non-voting) memberships for retirees and student members.

"We made these changes in MemberSuite with relative ease and no member downtime, which is a big deal."

"I was worried at first since we were redoing everything, but the software made it easy to upgrade to these new membership types and move people from one to another. If we need to revamp our membership model again, I'm not going to sweat it."

MemberSuite: an Honest Partner When Identifying Opportunities to Leverage Technology

Ronna has a good relationship with her Customer Success Manager (CSM) at MemberSuite. Each MemberSuite client is assigned a dedicated CSM who works with their client throughout the year to make sure they're getting the maximum possible value from their AMS investment. The CSM also serves as the client's advocate to the rest of the MemberSuite team, delivers client feedback to the product development team, and facilitates any support issues.

Ronna and her CSM meet monthly in addition to seeing each other at the MemberSuite user conferences. "I brainstorm ideas with him often. Could we use MemberSuite to accomplish X? What would be involved? I also like to get a feel for what other associations are doing. Is this practice old-school? How are other associations doing it?"

"The last time our board shared their list of strategic goals with staff, my first step was to go to our CSM to discuss how we could use MemberSuite to help accomplish the goals. He did some research on our behalf and came back with suggestions."

"He was honest and straightforward about how we could use MemberSuite to achieve some of the goals, but not all of them. He was very clear about MemberSuite's scope. He's not trying to snow us into making a round peg fit into a square hole. I find that very valuable."

As for the rest of the MemberSuite team? "We appreciate the improved customer service experience. We get answers to questions pretty quickly. I like it when the support team says, 'Let's walk through it together on a screen share.' That facilitates communication and speeds the solution along. Not every vendor provides support that way."

MemberSuite's Positive Impact on URMIA's Productivity and Bottom Line

Ronna said URMIA's collection rate is better with MemberSuite. "Automated billing runs, quick links to see all the open invoices, and the ability to search on specific invoice details—all those tools help us stay on top of collections like we were never able to do before."

"We don't need people dedicated to collections, billing, and invoicing full-time. Now they can be part of the membership team and work on retention and renewals as well."

MemberSuite also streamlined sponsorship tracking and billing. "We like that sponsorships are associated with specific events in MemberSuite because that's how we work. We can see records in many different ways, that's really helpful."

The marketing team at URMIA relies heavily on queries of data in MemberSuite. "They want to improve targeting. Content must be relevant and responsible. They don't want to send spam. For example, if we know who's already registered for an event, we shouldn't annoy them with additional prompts to register."

Event registrations are easier too:

"We had the 50th anniversary of our annual event this year, and registration was more complex than ever, but MemberSuite handled it just fine."

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What a Database Administrator
Loves About MemberSuite

As a technical staff member, Ronna notices things about MemberSuite that aren't always apparent to her colleagues. "MemberSuite is a very stable and reliable platform. I can't think of the last time it choked on us. Our old AMS crashed all the time, and staff lost hours because they couldn't get into it."

She also appreciates the ability to back up all URMIA's member data on a local drive. "MemberSuite makes it easy for me. Other SaaS we use don't offer that, which makes me nervous. I want my data. I do love that about MemberSuite. Not all AMS solutions do that."

"Whenever we're looking for other potential vendors, I ask if and how they integrate with MemberSuite. It makes no sense to me to duplicate data in multiple systems. With MemberSuite's API, it's possible to link different systems to our member data."

Conclusion

1   Complex membership structures are a cinch for MemberSuite. URMIA offers several types and tiers of organizational and individual memberships. Those records are stored separately yet tied together with different types of relationships. Benefits are automatically assigned to specific relationships.

2   MemberSuite gives URMIA the flexibility to change its membership model in response to market (and association) needs and preferences.

3   URMIA's staff appreciates the positive impact of MemberSuite's configurability on the member and staff user experience, for example, on the member portal, administrative 360-views, and event registration.

4   MemberSuite helps URMIA improve its collection rate and streamline sponsorship tracking and billing. Staff can shift focus from administrative tasks to membership recruitment and retention.

5   Technical staff appreciate MemberSuite's API, backup options, reliability and uptime, and customer support.

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MemberSuite is exclusively focused on providing association management solutions and services that empower your staff and engage your membership.

MemberSuite is the premier software and services provider of association management solutions. Purpose-built for the nonprofit market, MemberSuite harnesses the power of the cloud to deliver scalable, enterprise-class solutions that enable organizations to accomplish every activity they need to serve their constituents.

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