



Office of the VP Administration

# Clubs Management System Report

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## Dear Members of Council,

The following report will outline the reasoning and assessment methodology associated with the purchase of a new clubs management software. The system suggested will provide SAC with the ability to appropriately manage and deal with clubs in a simple manner that places all necessary capabilities into one simple and user-friendly portal. Beyond just helping the AMS, the system will create efficiencies with the management of clubs on the part of club executives, as they will be provided with the tools to achieve greater autonomy, yet remain connected with the AMS through ease of communication provided by the portal.

On behalf of the SAC team we would like to emphasize the importance of a timely approval of this program given the necessary training and implementation required. We are confident in our ability to thoroughly communicate and consult with clubs as to the best way to implement this program upon actual purchasing and training of the internal team.

It is critical that attention is provided to the understanding the current processes that AMS champions and how they are deterring the clubs experience (as outlined by clubs, found in the report), and are creating great inefficiencies.

If you have any questions, concerns or general comments regarding any of the information found in the report, or information that you were unable to find in the report, please feel free to contact me at [sacresearch@ams.ubc.ca](mailto:sacresearch@ams.ubc.ca).

Kind Regards,

Amanroop Rosode

# Executive Summary

As an organization that seeks to help students in every aspect of their University lives, the AMS is presented with a great opportunity to build off of this through the implementation and integration of a new clubs management software. Such a software will not only streamline processes and create greater efficiencies, it will also add great value to the lives of students, underneath the AMS umbrella, as they will be able to easily manage clubs, while maintaining communication with the AMS.

This report presents the results and recommendation associated with this project, providing a thorough analysis of the current capabilities and processes, as well as what is needed, and then analyzing the individual systems and deciding on one.

The AMS currently uses a Sugar CRM system, which performs very poorly on metrics based both off of performance speed and functionality. In regards to performance speed, Sugar is extremely slow and has a weak throughput speed preventing from efficient use. Functionally, Sugar performs very little of what is required of it; it does not archive any information nor does it have emailing capabilities. Beyond these primitive aspects, it only serves as an administrative tool, and does not have a portal aspect that allows for use by students.

Upon review of the current Sugar CRM system, as well as comparison between the researched systems (CollegiateLink, Community, and OrgSync), it was concluded that OrgSync should be implemented to harbor a strong club environment, adding value through computerization and information integration.

Alternatives to OrgSync included CollegiateLink and Community, both of which are improvements over the current system, yet fall short of OrgSync. To elaborate, CollegiateLink specifically does not allow for payment integration, and has a weaker user-interface while demanding a higher price. Although Community is cheaper than OrgSync, it is evident why this is the case, as Community does not offer an API (something conducive for easy automatic account creation upon students entering UBC), on top of this Community has a weak and extremely unfriendly user-interface with poor throughput speed and widget-responsiveness.

A major concern regarding OrgSync is how information is hosted in the United States and not Canada. This concern is raised quite often, but upon review and consultations with legal counsel it can be concluded that the AMS is not required to get consent specifically for storing personal information on American servers, and that the AMS need not allow individuals to opt out. Overall, there are no legalities preventing the AMS from housing information in the United States, and there should be no concerns regarding properly disclosing this information to students.

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# 1 OVERVIEW

Currently, the AMS employs Sugar CRM software; upon complaints and general disdain cited by back-end users of the system a project was undertaken. The main reasons of disdain were cited as being Sugar's: lack of user-friendliness, inability to record vital club information, poor searching capabilities, lack of archiving, lack of customization, slow throughput speed, and inability to computerize services (such as forms).

## 2 CURRENT STATE ANALYSES

### 2.1 Capability Requirements

In any project, it is compulsory to first understand the capabilities that are required for functionality. Although input was provided by workers within the SAC office, as to what they needed to do their job, final decision regarding what was actually needed, rather than wanted, was determined by Amanroop Rosode. Same applies to consultations with students who manage clubs.

*Capabilities of Back-End User (Administrators):*

- Ability to Maintain and Record Club Information Such as:
  - Club Executive Information
  - Club Standing With the AMS
- Maintain and Edit a Directory of Clubs
- Ability to Search Through Directory for Clubs
- Archiving of All Club Information (AMS Mandate)
- Club Waiver Forms and Surveys
- Messaging System Connected to E-mail

*Capabilities for End-User (Students):*

- Access to Names of Current Club Members and Club Standing
- Messaging System Connected to E-mail
- Event Hosting
- Waivers to Sign Members Up

The above mentioned capabilities are those that are essential to proper functionality of the AMS SAC, they do not include capabilities that can enhance user experience and or other aspects of the Clubs Management Process.

## 2.2 Current Process

As mentioned earlier the AMS, uses a Sugar CRM, with any CRM processes are created or worked around to allow for completion of tasks. For each capability listed in the Capability Requirements, for both back-end and end user, a brief overview of the process will be outline to properly acquaint one's self with the current work flow regarding Clubs Management.

- Ability to Maintain and Record Club Information:
  - *Sugar CRM allows for input of two club executives manually based off of physical forms or physical visits by club executives. At the beginning of each fiscal year (optimally) SAC employees input club data into the Sugar CRM. At most they are able to input two executive names and no other information about them. The entry of a new executive leads to the removal of past executives from the system (something that will be mentioned in archiving). Sugar CRM does not support the entry of club standing, as the CRM is not specifically designed for Clubs Management (due to this clubs do not know their standing with the AMS, will be later addressed).*
- Maintain and Edit a Directory of Clubs:
  - *At the beginning of the club fiscal year, any new clubs are added to the clubs directory on Sugar CRM by way of manual input based off of physical forms that have been completed. All other clubs remain in the system if they are untouched; in essence it is not required to reaffirm previous year's information.*
- Ability to Search Through Directory for Clubs:
  - *When looking through directory for clubs, SAC employees must type the club name, in a specific manner, into the search bar. The search algorithm for CRM is very much flawed, and requires someone with knowledge and experience using the system, because when a club is inputted the first name of the club has to be inputted. For instance, if searching for "UBC Sororities", the user cannot simply type in "Sororities," if this is done no results will show up. This has caused multiple problems whereby a club is mistakenly believed to have been de-constituted, only to find out that it was an error in the system. Such an algorithm has forced SAC employees to change the manner in which they search for clubs, whereby the search for multiple possible names of the clubs to ensure existence.*
- Archiving all Club Information:
  - *Currently Sugar CRM does not archive any club information, failing to comply with an AMS Mandate.*
- Club Waiver Forms and Surveys:

- *When conducting surveys, SAC employs Formstack, whereby they have purchased a subscription with maximum of 7 forms issued at once (no archiving ability). This is because Sugar CRM does not employ an e-portal service, it is a database. Club Waiver Forms are on physical paper, so when clubs submit waivers they are manually input by Finance Commission, creating a huge bottleneck.*
- **Messaging System Connected to E-mail:**
  - *Sugar CRM is unable to send messages to clubs, as there are only two executives in the system, and the system does not act as an e-portal. Due to this SAC employees use Mail Chimp. When SAC adds club information into the Sugar CRM, they then go onto manually input the same information into Mail Chimp, once in Mail Chimp they can e-mail club executive whose information they have input.*
- **Access to Names of Current Club Members and Club Standing**
  - *Because Sugar CRM does not have an e-portal clubs are not able to access the same information that is visible to back-end users. Moreover, to access names of club members, the clubs must keep a personal record of members. Many times this personally held information can be incorrect, so clubs visit SAC offices to consolidate their information to decrease likelihood of liability. Since club standing is not on the Sugar CRM, when clubs seek to get information regarding their standing they are unable to simply contact SAC (which is usually their first response). Instead most clubs discover their standing after making purchases on behalf of the club, and learning that they are not eligible for a reimbursement due to their standing. This can happen multiple times in a year, and Finance Commission does not simply email all clubs who have gone into a poor financial standing instead the process of learning ineligibility for reimbursement is usually repeated.*
- **Event Hosting:**
  - *Hosting events is critical for clubs, as it is how they offer value to their members. Most clubs use Facebook to create events, and then request physical payment for event fees and most clubs are too small to reasonably justify e-payment systems. Larger clubs use PayPal and other systems, including one offered by the AMS called Rezgo, which takes a 15% cut off of tickets.*
- **Waivers to Sign Members Up:**
  - *Physical waiver forms are used; clubs must have all members fill out the forms. There are two forms, those for students under 19 and those for those older than 19. Students under 19 must have a guardian sign their form is well to remove liability. Once filled out, forms are then handed into the Finance Commission.*

## **2.3 Current Systems Critique**

With over 200 clubs under management, with different sizes and varying needs, the AMS attempts to provide an active social environment for students. Although this is their mission, the current systems that are being implemented at the AMS, add unnecessary frustration that makes managing clubs a lot more complicated. Listed below are some of the overarching issues of the current system.

- Logic entails that a system that be implemented meet the bare minimum needs of the AMS, yet Sugar CRM does not do this. More specifically, it does not archive information of clubs, although to an external observer this may seem trivial, it is an actual written mandate of the AMS. Being that it is fundamental in the scope of the AMS, it is important that a system be in service that can actually meet this mandate.
- A club directory is used for both human resource purposes, as well as ease of mind when attempting to discover more about a club or finding useful information in contacting the club. Currently, Sugar CRM has a bare minimum system in which club executive input numbers are limited to two, allowing clubs to have the ability to hide outrageous executive numbers to boost resumes. Moreover, recording club information becomes an arduous task on Sugar especially since the throughput speed is very slow adding an extra 3700 minutes of input time on the side of SAC employees (5-10 minutes uploading club information, 370 clubs). Uploading club information onto Sugar becomes a formality due to the fact that it has no actual functionality, as it can't contact executives or members directly and it can't archive any of this information. In regards to contacting clubs, SAC employees must input information into Mail Chimp, taking another approximate 740 minutes (2 minutes uploading club information, 370 clubs).
- Being an old system, Sugar CRM has a very poor search algorithm. The algorithm used requires that the first characters of the club name be input. Even if certain characters persist within the name of the club, ordering is vital to find clubs. This creates countless problems, and adds extra time associated with finding clubs and changing their executive information.
- In any new CRM system forms are computerized, but Sugar does not have this. The biggest problem with this is associated with the large number of international students under 19 who attend UBC. These students are deterred from joining clubs, as they are forced to find a way to have their legal guardian sign their waiver form whilst they are in another country. Another problem is the potential liability associated with having younger students not sign the waiver form but still acting as a member of a club (and attending events), leading to potential liability associated with any harm inflicted during club activities.
- SAC employee's message clubs on a regular basis, and due to the fact that they cannot do this through Sugar they must use Mail Chimp. This becomes tedious because they are forced to upload contact information on a regular basis to reflect current club executives.

## 3 ADDED CAPABILITIES

### 3.1 Added Capabilities Associated with Computerization

- CWL Login:
  - *Important so that students won't be forced to remember multiple passwords (standardizing system login).*
- Safe Data storage:
  - *Due to the fact that the system will be holding student information, making sure that the system has strong server security is of paragon importance.*
- User Friendly Interface:
  - *Since this will be accessed by both employees and students user friendliness must be evaluated so that users won't shy away from using the system.*
- Ability to Pay for Membership and Events Electronically
  - *As more and more people begin to use online tools for purchasing, it is important that the AMS follow suite and have a cheap payment system that does not charge high service fees (such as Rezgo).*

## 4 STAKEHOLDER CONSULTATIONS

### 4.1 Focus Group Questions

After holding 4 different focus groups we had 34 club executives attend, ranging in sizes and missions. The focus groups were not incentivized, instead we urged clubs to come by simply highlighting the importance of the focus group. On top of this, it was made clear that we did not want anyone to feel shy, and that all perspectives were welcomed. Additionally, we went around to every executive in the focus group upon completion of a question to make sure that everyone had spoken their minds. This harbored an atmosphere of acceptance whereby people spoke their minds openly, both unafraid of angering AMS staff, as well as being frowned upon by peers that were in attendance. This methodology was effective as most people in the focus groups spoke, creating strong discussion.

Below are the questions that were presented to clubs at the focus groups, in exact order.

1. Could you please disclose your role within your club?
2. How do you feel about visiting the AMS SAC offices to manage your clubs?
3. As a club executive when beginning the fiscal club year what is the transition period like?
4. How do you feel about the current system used to register club members, whereby you sign paper waiver forms?

5. How has your experience with holding events and collecting payments for events been? Have you used Rezgo?
6. Are you aware of whom your club members are, and describe the processes associated with tracking and communicating with them?
7. Would you be interested in an online system where clubs would be able to use electronic waiver forms, advertise and create events, have access to member directory, have access to club history and pay for memberships and events

## 4.2 Club Consultation Responses

Although certain questions had greater discussion, each question was discussed relatively in-depth on the days of our focus groups (November 12 from 5-6 pm and 6-7pm, and November 14 from 5-6 pm and 6-7 pm). Below are consolidated responses to the questions above, in order (disclaimer: some of the responses to the questions are not associated with the question at hand, as many students would veer off topic but would still present substantial points).

1. To protect the identities of those who attended here is a list of clubs that signed-off saying they attended, some clubs did not sign, as well as this certain clubs had more than one executive attend (*Please refer to Appendix Figure 2.1 for list of clubs in attendance*).
2. Visiting the AMS offices can be slightly intimidating especially because you have no idea of your clubs standing when going in. Also walking into the office causes great confusion, as we don't know who to talk to, how to approach them, and a lot of the times they are not in their offices when convenient for us. On a more positive note, when the staff is present and if we aren't shy about asking for help, most problems can be solved in a reasonable amount of time, but communication regarding whether the problem has been solved becomes an issue. An instance of this lack of communication can be easily seen when re-submitting a budget or becoming in good-standing; in both scenarios we weren't notified of the progress, yet the lack of communication was supposed to act as an indicator that everything had been resolved – this places a great deal of pressure on us. Also when receiving reimbursements, we are forced to simply visit the AMS offices until the money is ready, and we are never notified if we have not picked up a reimbursement.
3. The transition period is very hectic and confusing, especially for those executives not accustomed to the current processes put in place. Moreover, when handing off the reigns to incoming executives many executives become careless and disregard the future executives and slowly begin to disassociate themselves with the clubs; this creates countless problems, as the only way to solve present issues within the club and get the appropriate information required to continue operating is by communicating with past executives. Since there is no universal system for hosting information of any sorts, gaining access to this information requires the previous executives to hand this information off to the new executives. As the new fiscal year begins we are made to create a budget with little guidance, as many of us don't have the appropriate financial

literate background we mess up consistently and not being able to speak with previous years executives only worsens this problem. Also having to be physically present to receive most of the information through orientations is simply not feasible and it would be better to have proper documentation sent to new executives to review.

4. Paper based waivers are extremely annoying and difficult to deal with. Firstly, getting members to sign the waivers requires us to actively find these members, which can be very hard with off-campus members. Moreover, these waivers can be lost very easily and the sheer amount of paper wasted goes against what UBC stands for. Also on multiple occasions we've had members sign the wrong waiver forms, requiring us to get them to re-sign the forms, which is both annoying and difficult because we can't simply make them sign something online. Then there is the huge problem with having under 19 members sign a waiver form, especially those from out of Canada. These members fall into two categories: those that become deterred from joining the club entirely, and those that join the club and ignore the form altogether. Overall we really need to use online waiver forms, because currently dealing with waiver forms is just unreasonably hard even though the task can be so simple.
5. Usually the experience is alright, but can become very difficult especially with getting people to actually show-up to events. If we have an online payment system it would be easier to get people to show-up, as they have already paid (this is where I mentioned Rezgo, where it was met with one of two responses: We don't know what Rezgo is, and Rezgo is too expensive). We don't typically enjoy using Rezgo due to the large service fee and general unfriendliness of the service. Plus payment is limited to master card, and keeping track of those who have paid through the batch system that Rezgo employs is very confusing.
6. We currently employ a suite of techniques, usually involving social media, but this is only effective to an extent. It is difficult to consolidate information easily, especially in regards to polling and interest in events we would like to throw. Moreover, club member email lists are extremely annoying as during transition periods they can be lost and then we no longer have a set of students that we could contact immediately to get re-signed. Also emailing members can be difficult as sometimes we don't have the appropriate email and or we don't have a system put in place to send out mass emails.
7. (Everybody was very enthusiastic about employing a computerized clubs management system). We think that a computerized system is something that the AMS should definitely implement, as we have so many difficulties that can easily be addressed by an online system. The biggest one I see is the computerization of waiver forms, especially for under-19 international potential members. These members are always deterred from joining, and from what we've been told if they do participate this creates a huge liability. Also it would be great to have an online system where each of the clubs can be listed and have their own page to communicate to potential members there value statement. An online system could also make it easier for us to communicate to our members, if there is

a method of communication through the system. (They asked many questions regarding the system including: Will it be a portal? Will we be able to host events on it? Will there be online payment processing? Will we be able to connect it to our other social media? Will we be able to see our members? Will it be easy to use?)\*.

\*The questions asked regarding the system were answered with refrain from mentioning the actual name of the systems or what they entail. Instead they were told that we were deciding between a number of systems and that their concerns would be taken into consideration regarding the system. One club executive specifically asked if the system was by Symplicity and this was met with uproar and disapproval from other executives in attendance, as the executives believed a system implemented by Symplicity would simply worsen the current situation.

### **4.3 Club Consultation Response Consolidation**

Upon holding the focus group sessions, below is the summary of concerns abstracting away details:

1. It can be slightly intimidating walking into SAC offices, especially not knowing if the club is in trouble
2. Although intimidating if you familiarize yourself with SAC they are very accommodating
3. Lack of communication (difficult to contact SAC and Finance Commission to determine things if office visits are not possible)
4. Huge Waiver Issue, especially with members under 19 due to the fact that they are scared away from joining the club because of inability to get in touch with legal guardian to sign away liability
5. Processing of grants is very inconvenient and can throw off balance for fiscal year
6. Difficulty getting reimbursements, especially in regards to lack of communication as to when reimbursements will be processed
7. Current physical waiver form system is outdated and it would be great if we could have online waiver forms, especially because it will make it easier for younger international members
8. Hard to get people to turn up to events and receiving payment for events (*side note: very few clubs knew what Rezgo was, and those who did disliked the service due to cost of the system and lack of intuitiveness*)
9. Difficult to communicate with members, and keep up with members. Forced to use external sources to keep documentation of members, and this becomes extremely annoying especially in transition periods whereby previous years information must be passed onto the new year
10. Want a computerized Clubs Management System

From the focus groups it was evident that clubs were distraught, more than anything, by the lack of online waiver forms and inability to communicate effectively with the AMS regarding the

clubs status. An online system could put a lot of ease on the clubs and allow them to have an easy way to establish a forum of communication between themselves and the AMS, as well as perform tedious tasks more simplistically through a computerization.

## **5 ALTERNATIVE ANALYSES**

\*For information regarding the alternative systems not found below, primarily visuals regarding the user-interface please refer to the Appendix

### **5.1 Interface**

The greatest difference between the systems relates to the Security of the Servers and User Interface.

In other attached documents you will find screenshots of the User Interfaces for each of the systems (Appendix Figure 3.1, 3.2, 3.3). Community, by far has the weakest user-interface, other than the fact that it is extremely unintuitive it has a poor throughput speed. Widget responsiveness is very weak and loading pages is as poor if not worse than other systems implemented by Symplicity. Moreover, it seems evident that Community has been built off the framework of other Symplicity products creating a poorly designed interface that does not allow for easy movement between different pages.

CollegiateLink has a very simple user interface that is intuitive and responsive. As well as this it has a strong throughput speed. Although CollegiateLink is good, overall OrgSync has the best user-interface, and the most customizable.

OrgSync's user interface is inherently customizable, as the system is based off of the organization's needs, rather than a blanket system that requires greater organizational change. More specifically, OrgSync will create different portals and layout configurations dependent on the organization, whilst the other two systems offer less customization (other than the University specific branding).

### **5.2 Security**

On the topic of security, Symplicity and Community both have servers hosted in Toronto. None has ever been breached, and they have strong documentation supporting the strength of the system. OrgSync, does not have a server in Canada, it has servers in the United States which are strong and reliable. These servers have also never been breached. The biggest concerns with servers is whether or not AMS deems it fit to fight for implementation of OrgSync seeing that this would require discussing with UBC to get permission to use the CWL Login knowing that the system has servers in the United States. But since other schools in Canada have done so it is possible, especially due to their strong 256-bit encryption. On top of this there are no legal

concerns that can be raised by hosting information in the United States (please refer to Information Hosting Analysis).

### **5.3 API**

Both CollegiateLink and OrgSync have API's associated with the system, Community does not. This would prevent integrations from being built to external systems, which would disallow, or complicate, the AMS from: custom exporting data from system to public website, and linking with on campus student information system (automatic account creation, automatically exporting/importing new/old students).

### **5.4 Further Critique**

Another aspect of capabilities not mentioned earlier (due to the fact that it is not a current capability) is payment for membership and events. This is extremely important because clubs are using other systems that can make it hard for them to track their money. As well as this, clubs can be charged high service fees.

Having an online payment capability is extremely important, but of the three systems only CollegiateLink lacks this capability. This is extremely negative, as it allows for students to join clubs but executives are given the responsibility to track physical payment to make sure membership fees have been submitted. With an online payment system students will be able to easily pay for membership and events. OrgSync has the strongest system, easily integrating with multiple vendors, including PayPal. Community is also able to allow for this but does not have as much experience with multiple vendors nor does it have as seamless as integration as OrgSync does.

Another aspect that is important is CWL Login ability. If a system is to be implemented CWL login is critical, as it would place an ease of mind on the students, preventing them from being swamped with passwords. Currently, each system can integrate with the CWL system at UBC, but only OrgSync can allow students to login into their Connect accounts and SSC through the portal. This is useful as it lets students have one way of entry into multiple systems. Other than this each of the three systems is able to integrate campus email into the system.

Each of the systems also carries a club directory and recommendation agent. Of the three Community is the least intuitive, making it difficult to traverse the interface looking for clubs. Moreover, the system is very slow, making loading pages a hassle. Each of the systems creates a page for the clubs, Community being the simplest. OrgSync goes a step further and hosts free customizable websites for each of the clubs (further decreasing club costs). The site builder is

very user friendly and also allows for more experienced developers to use other web development tools.

Of the three only OrgSync allows for monitoring of club event attendance. This is important for admins, as it allows them to easily evaluate the performance of clubs, also club executives can see who has and who hasn't been attending clubs. Other than events analytics the other systems each have strong analytics tools that will remove the need to use outside sources to develop analytic reports.

Lastly, Community does not have a public API, but one can be developed for an undisclosed cost.

## 6 INFORMATION HOSTING

### 6.1 Information Hosting Analysis

Unlike Community and CollegiateLink, OrgSync has its servers hosted in the United States. Due to this it is imperative that it is ensured that this is acceptable and adds no extra liability on the part of the AMS to host in the United States. Below is information outlining why the AMS needn't worry about storing student information in the United States.

1. *The AMS is not required to get consent specifically for storing personal information on American servers, and does not need to allow individuals to opt out*
2. *The AMS does need to get consent to collect and use personal information from club members, but that is implicitly given when someone voluntarily chooses to join a club*
3. *The AMS does need to notify club members of what the AMS will use their personal information for (but this can be a fairly broad statement, along the lines of saying the AMS is using the information to manage their club membership or for club or SAC business)*
4. *AMS should probably notify students that information is being stored outside of Canada, but this is only out of choice, and there is no legality binding the AMS to ask for consent to store information outside of Canada*
5. *Assurances should be made in a contract with the third party that the information will be kept securely, this can include documentation outlining the strength of the servers, as well as written guarantees*
6. *Since the AMS is not a public body, like UBC, there is no documentation forbidding the storage of personal information outside of Canada*
7. *The requirement to notify is not explicitly in the law covering the AMS (PIPA) but was declared by a court ruling under the federal privacy law (PIPEDA), in a case reported by the AMS's legal counsel (<http://www.davis.ca/en/news/federal-privacy-commissioner-issues-long-awaited-findings-on-complaint-about-cib/>) (a 2005 Alert from Davis & Co, our lawyers). At a minimum, a Canadian company that outsources*

customer information processing to the USA should notify its customers that the information may be available to the US government or its agencies under a lawful order made in that country. CIBC provided an appropriate notice to its customers, but ought to have been more clear that customers were not able to opt out of having their personal information sent to the third-party service provider (i.e. the only effective way to opt out would be take the credit card business elsewhere))

Please refer to Appendix Figure 4.1 for added information regarding Information Hosting.

## 7 PRICING

### 7.1 CollegiateLink Pricing

	CollegiateLink		
Contract Length	Non-recurring	Recurring	Total
2 Year	\$ 27,054.00	\$ 30,000.00	\$ 87,054.00
3 Year	\$ 27,054.00	\$ 30,000.00	\$ 117,054.00
5 Year	\$ 27,054.00	\$ 30,000.00	\$ 177,054.00

### 7.2 Community Pricing

	Community		
Contract Length	Non-recurring	Recurring	Total
2 Year	\$ 11,000.00	\$ 8,500.00	\$ 28,000.00
3 Year	\$ 11,000.00	\$ 8,500.00	\$ 36,500.00
5 Year	\$ 11,000.00	\$ 8,500.00	\$ 53,500.00

### 7.3 OrgSync Pricing

	OrgSync	
Contract Length	Yearly	Total
2 Year	\$ 27,450.00	\$ 54,900.00
3 Year	\$ 25,500.00	\$ 76,500.00
5 Year	\$ 23,730.00	\$ 118,650.00

## 8 RECOMMENDATION

### 8.1 Recommendation

A clubs management system is essential to the success and continual growth of any student body organization, the AMS being no exception. With over 300 clubs underneath its watchful eye, the AMS has been facing growing concerns with effective management, as well legal concerns over student's disregarding waiver policies.

Being a long standing organization, any system put in place should be one that is meant for long-term sustainable use. The system put in place should also allow for ease of integration with any future system put in place, due to the fact that it is highly recommended that the AMS look to streamline information between functional silos in the future.

Moreover, the implemented system should not simply meet the bare bones criteria but should meet the criteria strongly and should present a solution that creates strong customer intimacy, allowing for a phenomenal user experience. On top of this customization is very important in achieving a strong user-experience, as clubs view themselves as separate entities trying to create a strong community for those who align with their values and objectives.

*After a thorough analysis of the AMS and its capability requirements and current processes, as well as an analysis of the alternatives, it is highly recommended that the AMS pursue **ORGSYNC**, for it is the strongest long-term solution that can create and sustain an environment of involvement.*

*The OrgSync system will match each of the criteria specified and will have offer the best overall value. In regards to its servers being located in the United States, this is actually not a problem as the AMS will not be held liable due to legalities that allow for external information hosting and the safe-guards put in place by OrgSyncs servers, which have a 256-Bit Encryption. On top of this, other schools in Canada have also implemented the system and have faced no troubles integrating campus login, as well as storing student information.*

*Lastly, on top of this recommendation it is important the AMS consistently review its systems that have been put in place to always allow for opportunities to better improve information movement and clubs relationship management. Currently, the recommended implementation of OrgSync does not contain a budgeting system, but in the future it should be noted that upon OrgSync's success a budget management system is also reviewed.*

*In conclusion, OrgSync is simply the best solution due to the fact that it: matches all criteria, allows for sustainable future improvement, offers a user-friendly experience, and is the best overall value for service offered and price. For a demo usage of OrgSync please follow instructions listed in Appendix Figure 5.5.*

# Appendix

## Figure 1.1 (CollegiateLink Implementation)

*Please follow link to appropriate titled documentation*

<https://drive.google.com/file/d/0B443CWD65eyzRDduUHgxb3JTUlk/view?usp=sharing>

## Figure 1.2 (Community Implementation)

*Please follow link to appropriate titled documentation*

<https://drive.google.com/file/d/0B443CWD65eyzb1dBOGVWdFFhb0E/view?usp=sharing>

## Figure 1.3 (OrgSync Implementation)

*Please follow link to appropriate titled documentation*

<https://drive.google.com/file/d/0B443CWD65eyzREFSQkJvaVdFNU0/view?usp=sharing>

**\*Please note that implementation for OrgSync takes between 6-8 Weeks**

## Figure 2.1 (Clubs Who Participated)

Unlimited Dance Club – VP External  
UBC Tamil Students Association – President  
Origami Club – Treasurer  
Fencing Club – Treasure  
Navigators – Treasurer  
Dance Club – IT Manager  
Pre-Education Club – President  
BC Dragon Boating Club – President  
Zen Buddhist Club – President  
UBC Cancer Association Club – Fund Raiser Director & IT Director  
UBC Beats & Crafts Club – President  
UBC Wargamers - treasurer  
UBC Anime Club- President  
UBC Junoon – President  
UBC Addiction Awareness Club – President  
Ubc Canadian association of foodservice professionals – secretary  
UBC Tea Club – Media coordinator

Ubc focus club – president  
Global Water Brigades - president  
Fencing Club – President  
Psychology Students association – President  
Varsity Outdoor Club – President  
Dance Horizons – President  
UBC Agape Street Missions – Vice President  
Older Wiser Learners – President and Treasurer  
IRSA – Alumni Affairs  
International Students Association – VP Admin  
Indian Students Association – Events Coordinator  
Indian Students Association - Marketing Coordinator  
UBC Mahjong – President

## **Figure 2.2 (Questions Asked in Focus Groups)**

1. Could you please disclose your role within your club?
2. How do you feel about visiting the AMS SAC offices to manage problems with waivers, finding out if your are in good standing, etc?
3. As a club executive when beginning the fiscal club year what difficulties, if any, do you have?
4. How do you feel about the current system used to register club members, whereby you have to sign physical paper waivers, (have you had any problems with this system)?
5. How has your experience with holding events and collecting payments for events been? Have you used rezgo?
6. Are you aware of who your members are, and how has your experience been with communicating to your members?
7. How would you feel about an online system where clubs would be able to register members by signing waivers, create events, have access to their member directory, have access to club history, and pay for memberships and events?

## **Figure 2.3 (Survey Responses)**

*Please follow link to appropriate titled documentation*

<https://drive.google.com/file/d/0B443CWD65eyzcHJEeEINYIRZek0/view?usp=sharing>

## **Figure 3.1 (OrgSync User-Interface)**

*Please follow link to appropriate titled documentation*

<https://drive.google.com/file/d/0B443CWD65eyzZFF2WG5LTFVPZzQ/view?usp=sharing>

## Figure 3.2 (Collegiate Link User-Interface)

*Please follow link to appropriate titled documentation*

<https://drive.google.com/file/d/0B443CWD65eyzNwVFT1FmWVITcEk/view?usp=sharing>

## Figure 3.3 (Community User-Interface)

*Please follow link to appropriate titled documentation*

<https://drive.google.com/file/d/0B443CWD65eyzMWxQUEhyaDBoMlk/view?usp=sharing>

## Figure 4.1 (Personal Information Storage)

<http://blog.privacylawyer.ca/2011/04/cloud-computing-and-privacy-faq.html>:

### **If we go with a cloud solution, should we give notice of this to our customers/users?**

Under most Canadian laws, you technically do not need to seek consumer consent or provide notice. However, the Privacy Commissioner of Canada has taken the position that businesses that propose to have personal information processed outside of Canada should give notice of this to customers. This is not required under the statute, but probably represents a best practice. If you are required to give notice or elect to as a best practice, you should be mindful of how it is presented to your customers so that it does not appear to be a request for consent that they can “opt out” of or that raises concerns. Under the Alberta and Quebec private sector laws, you are required to give notice of this to your customers. (A lawyer’s site, dated April 2011.)

[http://www.priv.gc.ca/information/guide/2009/gl\\_dab\\_090127\\_e.asp](http://www.priv.gc.ca/information/guide/2009/gl_dab_090127_e.asp):

Regardless of where the information is being processed - whether in Canada or in a foreign country - the organization must take all reasonable steps to protect it from unauthorized uses and disclosures while it is in the hands of the third party processor. The organization must be satisfied that the third party has policies and processes in place, including training for its staff and effective security measures, to ensure that the information in its care is properly safeguarded at all times. It should also have the right to audit and inspect how the third party handles and stores personal information, and exercise the right to audit and inspect when warranted. (Canadian government guidelines issued in 2009.)

<http://www.mondaq.com/canada/x/219814/IT+internet/Outsourcing+By+Canadian+Companies+Another+Look+At+The+USA+PATRIOT+Act>:

Overall, a review of recent decisions in Canada shows that these concerns are overstated in light of the risks, and that for private sector businesses there are *no* prohibitions on outsourcing to the United States in light of the PATRIOT Act, provided (1) reasonable safeguards are built into the outsource contract (including confidentiality, use-restrictions, security, and provisions to meet monitoring and audit requirements), and (2) customers are notified in a clear way when their personal information will be stored or handled outside Canada. It is important to remember that the confidentiality and use-restrictions

imposed on the service provider must be tied to the purposes to which the customers originally consented. (A lawyer's site, dated February 2013.)

[file:///C:/Users/Archives/Downloads/GD\\_Cloud-Computing-Private.pdf](file:///C:/Users/Archives/Downloads/GD_Cloud-Computing-Private.pdf):

An organization needs to ensure that appropriate consents have been obtained if it plans to outsource personal information to a third-party cloud provider. If an organization has obtained an individual's consent to collect and use personal information for a specific purpose, it does not need separate consent when outsourcing to a cloud provider to process the information for the *same purpose* outlined at the time of collection. Ideally, at the time of collection, organizations should inform customers in clear and understandable language that their information may be processed by a third-party service provider.

As noted in the Introduction to Cloud Computing – FAQs, any organization using a cloud service must carefully review the cloud provider's terms of service and ensure that the personal information it entrusts to the provider will be treated in a manner consistent with its privacy obligations under relevant privacy legislation. In short, SMEs [small or medium-sized enterprises] must use contractual or other means to ensure that personal information is appropriately handled and protected by the cloud provider. The bottom line? If you are not comfortable with what a particular cloud provider is proposing, you should not transfer personal information entrusted to you by your customers to that provider. You should push back, or take the time to shop around for a better solution. Check out other providers and confer with other similar businesses or your industry association to see what options may be available.

(From the Office of the Privacy Commissioner of Canada and the Offices of the Information and Privacy Commissioner of Alberta and British Columbia.) Accessed from <https://www.oipc.bc.ca/for-private-organizations.aspx>, the BC government site, July 31, 2014.

## **Figure 5.1 (Australian OrgSync Marketing Video)**

The link below leads to a video created by University of New South Wales promoting the adoption of the OrgSync video. This video and others like it show the strong community culture attributed with OrgSync and the consistent help that OrgSync provides to its clients.

<http://youtu.be/lue4PB2mi0I>

## **Figure 5.2 (OrgSync University of Calgary Case Study)**

The link below is attributed with a case study done on the implementation of OrgSync at the University of Calgary.

[http://www.orgsync.com/case\\_studies/campus-spotlight-university-of-calgary](http://www.orgsync.com/case_studies/campus-spotlight-university-of-calgary)

## **Figure 5.3 (University of Calgary OrgSync Testimonial)**

The link below leads to a video of a University of Calgary student leader describing his ongoing experience with OrgSync

<http://www.orgsync.com/videos/connecting-clubs-to-the-student-union-at-the-university-of-calgary>

## **Figure 5.4 (OrgSync in 3 Minutes)**

The attached link is for a video describing what OrgSync can do for an organization.

<http://vimeo.com/89156465>

## **Figure 5.5 (OrgSync Demo Website)**

Demo Community Access:

To access the demo community, please click the link below and follow the instructions.

Link: <https://orgsync.com/login/orgsync-staff-testing-community>

1. Click "Can't Find Your Community?"
2. Enter 'demoadmin' for the e-mail
3. Enter 'demoadmin2' as the password