"Extending the AS Contract with OrgSync"

Proposed Motion: The AS Board of Directors authorizes the renewal of the contract with OrgSync and directs the AS Budget Committee to make available the funds to cover the annual expenses of that contract, not to exceed $17,000 per year.

Sponsor: VP for Activities, Jarred Tyson
Persons of Contact: Casey Hayden (Student Activities Advisor), Kasey Koenig (AS Club Coordinator), Lisa Rosenberg (Assistant Director of Student Activities, Chair of OrgSync Implementation Team), Taylor Franks (AS Business Director)
Guest Speaker: Casey Hayden and Kasey Koenig

Date: *March 31, 2014*

Attached Documents
> • Proposal supporting document attached herein

Background & Context

The AS is coming the close of its third year utilizing OrgSync as a platform for managing AS Club involvement and for providing productivity tools to clubs and program offices. On May 25, 2011, the AS Board voted to allocate $42,000 from reserves to fund the implementation of an organization management software solution for three years. The choice between the two leading products (OrgSync and CollegiateLink) was left to a separate procurement committee comprised of a mix of students and staff and led by the WWU Purchasing Department, since this purchase was over $10,000 and would involve formal vetting and RFP (Request for Proposal) through the typical WA State procedures.

OrgSync came out of that in-depth review process as the leader and was chosen as our campus' solution. OrgSync's customer service, technical staff, and business representatives have all met or exceeded our expectations throughout our partnership. The product has continued to grow and develop new tools and features that we've benefitted from at no additional cost. And we chose, this year, to opt in to purchasing the API (application programming interface) for the product so we would be able to pull data from the system and write our own in-house code to utilize that data in specific and powerful ways within existing systems (e.g. new and improved AS web calendar).

A couple of things were clear when the original funding was made available for OrgSync:
1) The initial rollout of the product (Year 1) would be for clubs only, with access to program offices being opened up once enough familiarity with the system was gained. This has been the case.
2) These 3 years would involve a continually evaluative look at whether or not OrgSync would continue to meet our needs. This has been done.

Utilization data shows consistent growth in the adoption and usage of the system (more on that in the proposal). Student users have seemingly adopted OrgSync at a rate that points to success and ease-of-use of the system. As the proposal mentions, there are several initiatives in the works that would increase usage and familiarity among the student body even more (see "Current & Possible Future Developments" for details).

Summary of Proposal

The proposal is very comprehensive and includes information and additional context for this major decision such as, the benefits of OrgSync, utilization, a SWOT analysis, alternative solutions, future developments, and breakdown of the fiscal commitment. Ultimately, we hope that the Board will find that OrgSync is still very much meeting (and anticipating) our needs and that it is well worth the annual cost. OrgSync, as a third party provider, still seems to be a very healthy organization that is growing and adding campuses all the time, therefore lending some confidence that we would be able to work with this partner for the foreseeable future.

Fiscally (See full statement in the proposal)

Depending on the length of our contract and how many WWU campus partners join in as additional departments using OrgSync, the annual cost will range from $13,700 - $16,200.
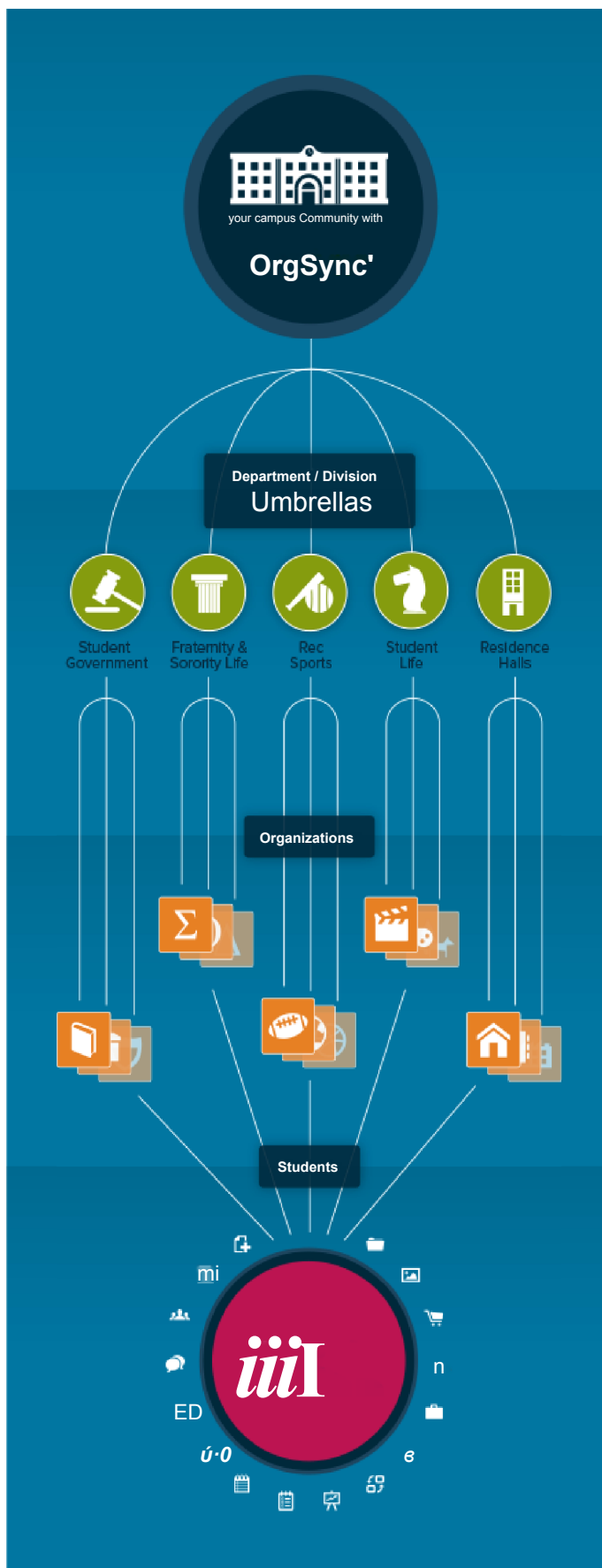
Many campus partners (400+ actually) use OrgSync in a variety of ways, but we will just focus here on how we here in the AS have used the product.

It is important to remember that the service has multiple functions that operate at different levels. So judging the usefulness or success of the product should be done holistically with these **"Prime Functions"** in mind:

OrgSync is to our campus...

1. **An Online Administrative Structure** which allows a great deal of controlling permissions, oversight, archiving, and exporting of the user and organizational data. Also, this structure enhances connection to and communication with users and orgs.

2. **A Suite of Productivity Tools for Campus Organizations** designed to meet the needs of a variety of groups. It is not the expectation that every group will use every tool, but that the tools are comprehensive enough to present a solid solution for our groups when needs arise.

3. **A Nexus for Campus Involvement Opportunities** which are prominently displayed, searchable, and join-able. This prime function is strengthened by having links to OrgSync easily accessible and by adding further campus integration.

2007 - 2011   We discovered OrgSync and explored the idea of implementing it with a few starts and stops and lots of online demos until it was supported by the Board in 2011.

2011 - 2012   Year One: OrgSync staff traveled to WWU to train professional staff and student leaders and were present to help launch at the fall AS Club Kickoff. We got positive feedback and immediate integration of all clubs into the system. Tested the Budget Management System (BMS) but intentionally wanted to experiment for a year before launching this feature.

2012 - 2013   Year Two: Enacted first spring-to-fall club renewal process via O.S. with great success. Saw increased usage. Allowed AS Programs to opt-in to use particular features they saw as valuable. Removed BMS from the billing as we had decided to postpone using   it until it better met our needs.

2013 - 2014   Year Three: Have had continued growth in club users; purchased the API and began work on integrated AS calendar; Programs still using some features; re-examined BMS to find that its upgrades work well for us; the Ree Center has expressed interest in signing on with their own OrgSync Umbrella; Viking Village would like to join in; and other exciting developments are mentioned later in the proposal.

Benefits for Clubs

A) Centralized location for the many forms that clubs need to access.

B) Easy online renewal and updating of the club.

C) Instantly added to online club list.

      a. Before OrgSync, recognized clubs had to wait for staff to manually enter the club on the website.

D) A way for interested students to find the club and request to join online.

E) Ability to submit event info directly onto a public event calendar.

F) Having the correct (and more) officers receive messages from the Club Hub with important updates.

G) Tools for managing contacts, rosters, calendars, polls, etc.

H) Full control of online description and contacts.

I) Centralized resources and files for easy access to event planning tips, tools and legacy documents.

J) Option to host a free website.

K) Powerful collaborative To Do List tool for group work on events and/or projects.

L) *(if BMS is implemented)* Up-to-the-minute financial status info and central tracking system for funding requests, current balance, and expenditure requests without duplicate entry (like in an Excel doc).

Benefits to the Student Body

A) Up-to-date and detailed information available on all active clubs and a method to join online.

B) Easy-to-use forms and clearer, more efficient steps to forming a club.

C) Once involved, OrgSync tracks your memberships and involvement and offers a co-curricular transcript.

D) All users can make use of the ePortfolio, a personal webpage that displays resume-style info and chosen involvement history for prospective employers.

E) *(Coming Soon)* Better awareness of campus meetings and events via the integration of the OrgSync calendar with the AS web calendar.

Benefits for the Club Hub (AS Club Activities Office)

A) Have saved a ton of paper and staff hours managing the most basic function - club recognition.

B) Current and exportable email lists for all club leaders (without having to manually enter them into 3 separate pieces of software like the pre-OrgSync days).

C) Ability to message clubs in SO many cross-sections (e.g. by category, just officers, budget authorities, selecting particular clubs with checkboxes, news posts versus emails, and more).

D) Expedited and efficient renewal process and automated tracking of club status/last renewal date.

E) FORMS! This tool is SO useful it is nearly worth the price of OrgSync all by itself!

      a. Easy creation

      b. Stored in one system for easy access and record keeping (instead of floating in various email inboxes)

      c. Also great for surveys and identifying trends or quickly finding historical information.

F) Easy access to club records and information when trying to piece together how we can help them.

G) Drastically reduces time spent managing online club listing.

H) The Club Hub is more knowledgeable about upcoming club events via the Events tool and the ASERT Form.

I) Has been an excellent organizational tool for the Activities Council, saving paper and allowing more immediate access to information as well as speedier post-meeting action steps.

J) Club Hub staff have enjoyed using the To Do List tool for planning club system-wide events.

K) Having the knowledge that ALL clubs can access through their portal any form, file, or video tutorial that we deem important enough to post in that way.

Benefits for AS Programs/Offices

A) Using the forms tool
- a. Easy to create and send out with a simple uri which can be filled in by people without WWU logins and those who have never logged into OrgSync
- b. Provides long-term, centralized form submission storage and archiving
- c. Exporting form submissions into Excel and seeing graphs in OrgSync of your results
- d. Excellent replacement for WWU eforms
- e. Examples: AS Publicity Requests, Activities Council Funding Request, Viking Lobby Day Signup, AS Committee Applications, Labyrinth submissions, Viking Con confirmations, etc.

B) AS Committees could benefit from greater use of OrgSync, especially in conjunction with Surface tablets at meetings
- a. Saves paper
- b. Historical records are at the group's fingertips
- c. Immediate action can be taken on forms or to form subcommittees or draft brainstorm lists

C) Excellent way to connect with volunteers by adding them to the office portal
- a. AS Productions has used this extensively (as did KVIK a year ago) and has even used the timesheet function to track volunteer hours (as well as hourly staff shifts completed)

Benefits for Viking Union / Student Activities Offices

A) Finance Office:
- a. Having more student contact info available when needing to reach someone
- b. Video tutorial on filling out an ER has helped several student Budget Authorities get forms correct

B) VU Reservations:
- a. System for checking permissions for room reservations
- b. Trustworthy data source to check against and compare with event info
- c. Video tutorial on making room and Vendor's Row reservations has helped many get that right

C) VU Admin Desk (5th floor):
- a. Has considerably lightened the record-keeping burden this area used to perform for club registration
- b. Provides accurate club contact info to give out
- c. Asking whether clubs want/need a mailbox has allowed for an exportable list to speed up the tabulation of this resource

D) LEADS Program:
- a. Exploring using the co-curricular transcript for student peer mentors and leadership class participants

E) Ethnic Student Center:
- a. Using the Contract Payment Request Form to expedite the drafting of contracts for events

Total Users (per month)
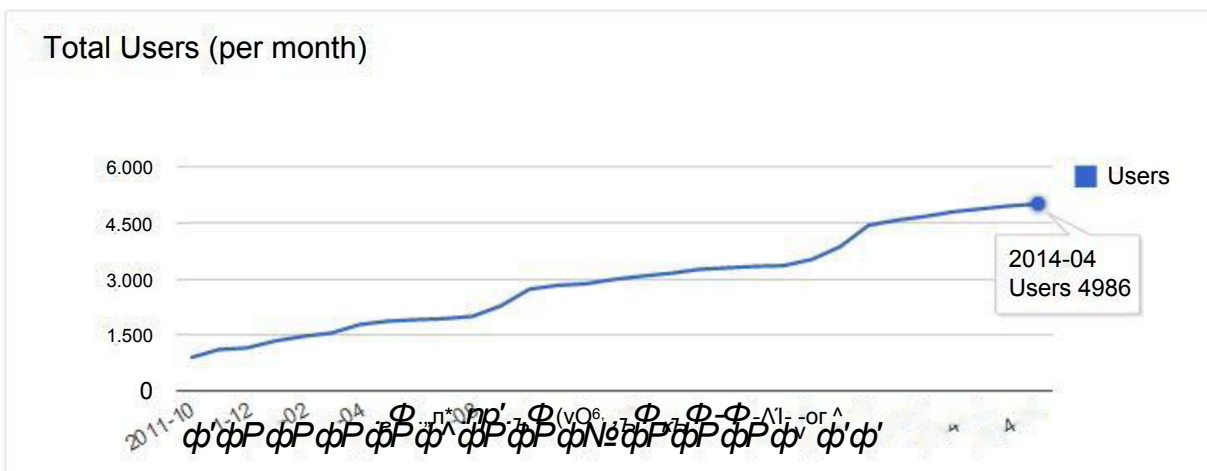
The above total includes some users who have graduated as well as some who have gotten into the system just to explore and have not joined clubs. Subtracting the "explorers," we're left with 3625 actually showing membership in at least one club/org, an increase of 940 from last spring.

New Users (per month)
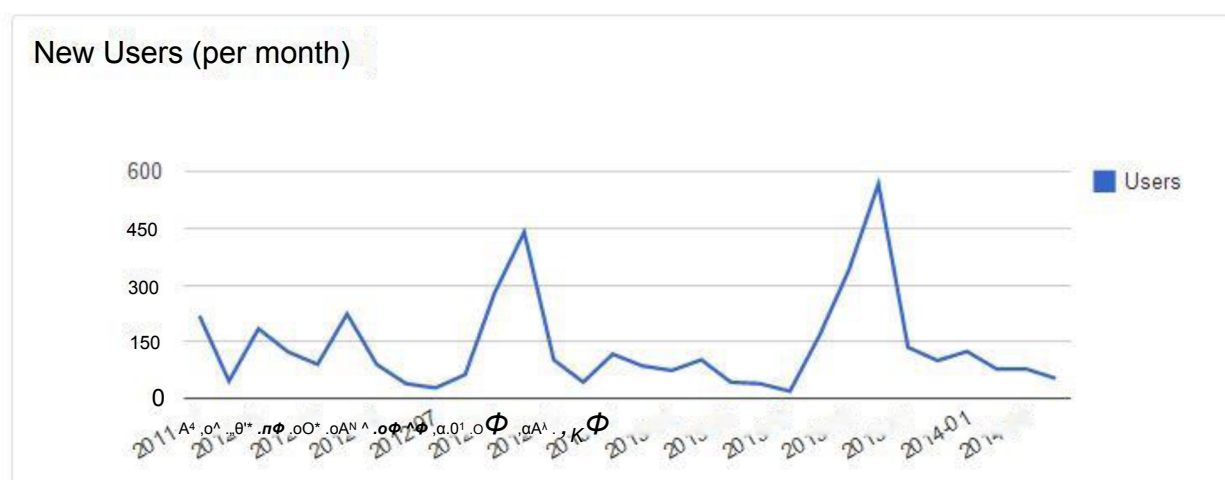

The larger spike in Fall '13 shows increased usage, exploration of the system, and adoption than in previous years.
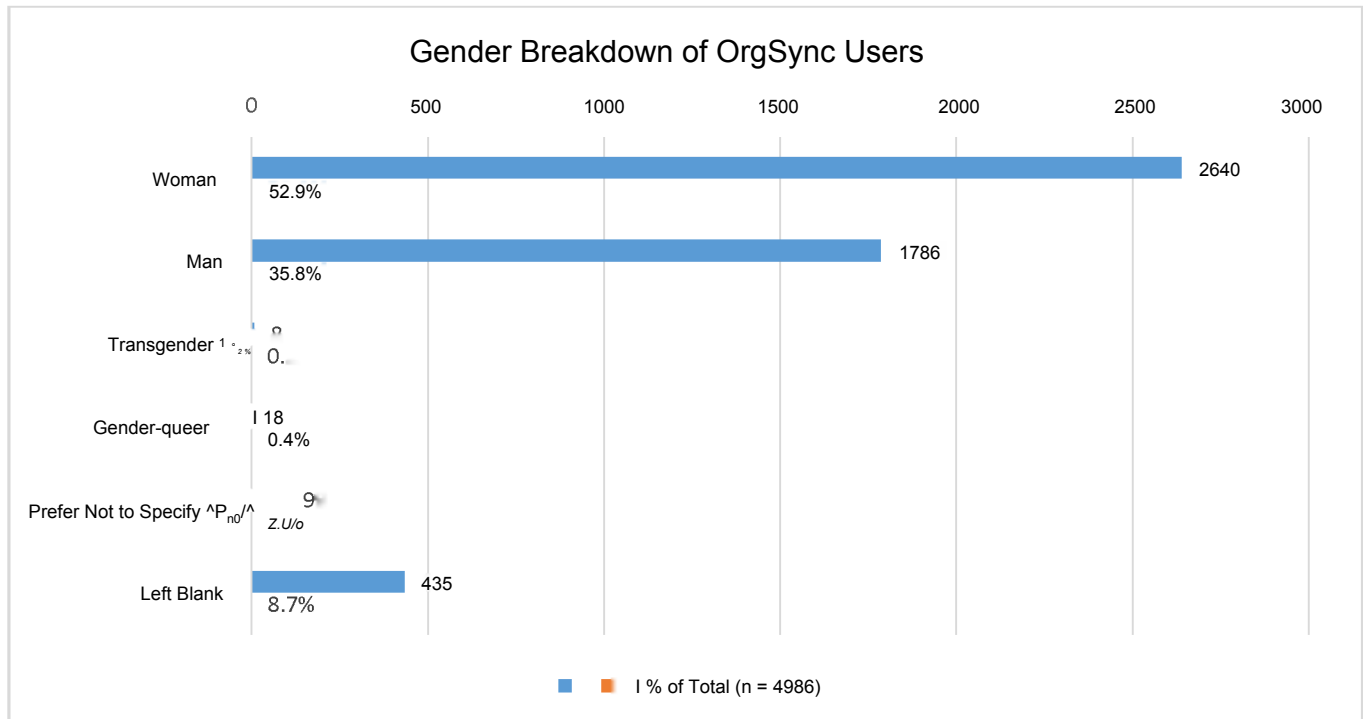
Active User Logins

In the last 60 Days...

- 2012 - (approx. 4/22/12 to 6/22/12) = 478 users have logged in
- 2013 - (approx. 4/25/13 to 6/25/13) = 563 users have logged in
- 2014 - (approx. 2/10/14 - 4/10/14, which includes break) = 679 users have logged in

of Clubs

Term	# of Clubs
Spring 2012 ▪	222
Spring 2013	244
Winter 2014	231
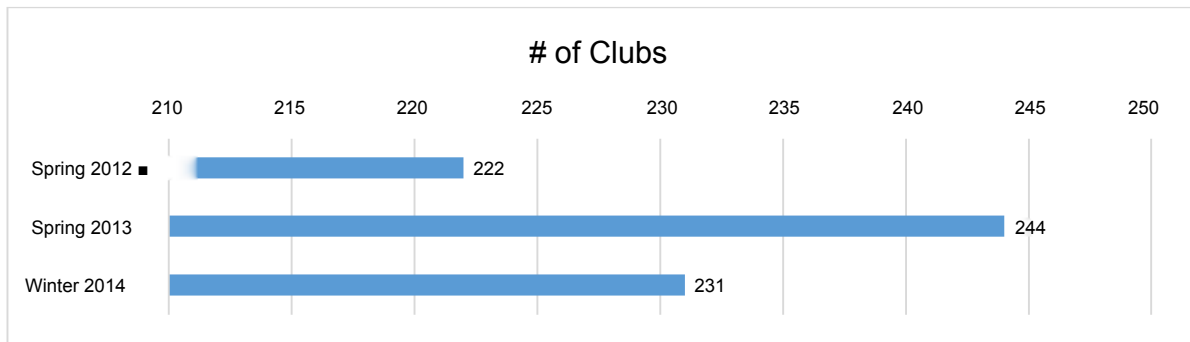
It is likely that by the end of Spring 2014, the number of clubs will reach the Spring 2013 or exceed it.

Gender Breakdown of OrgSync Users

Gender	Count	% of Total
Woman	2640	52.9%
Man	1786	35.8%
Transgender	8	0.2%
Gender-queer	18	0.4%
Prefer Not to Specify	9	2.0%
Left Blank	435	8.7%

I % of Total (n = 4986)

Factoids:

Number of forms submitted in 2013:   2,377
Roughly how many pieces of paper saved: 7,131

Most Hours logged in timesheets:
     AS Productions -1148

3 largest club categories (easy to see at a glance)
     Academic/Departmental - 45
     Arts, Music, & Dance - 44
     Special Interest - 37

3 largest clubs:
     WWU Hikes-251
     WWU Humans v Zombies - 205
     NeRDS (Neuroscience Research Driven Students) -143

STRENGTHS

- Highly detailed Umbrella Admin Functions
- Streamlined Registration & Renewal
- Centralizing Forms & Resources
- Live Updates to Website and Directory of Clubs, makes them more searchable
- Clean UI & Easy to Use
- Constantly Evolving / Improving via the support of a large developer staff
- Excellent Solution as online form-builder (for programs too)
- Allows for online joining of clubs
- TONS of tools to fit the needs of groups (financial mgmt, to do lists, website, communication, etc.)

CHALLENGES / WEAKNESSES

- Sometimes viewed as "yet another tech service to add to my life." (this would be the case no matter what we used)
- We know there are still some who don't pay close attention to OrgSync generated email notifications (hard to quantify how widespread this issue is)
- Accessibility of getting into the system (placement is improving - MyWestern,etc)
- Does not replace the usefulness of Facebook as a communication tool, hasn't been our goal but would be nice if its notifications and "hooks" were as easily accessible

OPPORTUNITIES

- Greater familiarity via importing all WWU students into the all-user portal
- Provide orgs better access to financial information using Budget Management System (integrate funding allocation, budget tracking, expense approval, and payment processing)
- Create a more active all user portal by working with Viking Village to operate
- OrgSync smartphone app forthcoming for greater accessibility
- Continued partnerships with NSSFO and Admissions to get students more familiar and directed to the service

THREATS

- OrgSync could go out of business (unlikely in the near future)
- Costs are controlled by 3rd party, could go up
- Surprise Development of a new cheaper (or free) service that seems to do all that O.S. can do plus more and is favored by club leaders because of smart/hip design (e.g. Trello if it had more structure and more tools)

Alternatives to Using OrgSync?

The simple truth is that there is no other product or service currently available that offers as many features and administrative functions as OrgSync, especially one that specifically serves the higher education sector and has such a high level of customer service, tech support, and constant innovation. So, you could skip this section, or if you're interested, read on.

Remember the "Prime Functions" mentioned earlier:

1. An Online Administrative Structure
2. A Suite of Productivity Tools for Campus Organizations
3. A Nexus for Campus Involvement Opportunities

Other Options	Prime Functions Covered	Summation
Facebook	2 (somewhat) 3 (loosely)	Still very useful as a grouping and communication tool. Serves for many groups like a webpage. Not a viable alternative without the #1 prime function. And #3 only exists if you're savvy enough to search all the groups in the Western network on facebook, and even then you just scroll through the list.
Google Drive	2	Great tools (docs, forms, calendar, etc), but permissions and sharing being so tied to the individual file created instead of a multi-level organizational approach makes this not a viable option. Google+ would be similar to Facebook in its very limited way of serving as the nexus for campus involvement.
Trello	None	Trello is awesome, but essentially just does an amazing job of one of OrgSync's tools - the To Do List tool. It does this WAY better than OrgSync, but it is only one of the many tools. You could maybe also stretch it to say that Trello could be a file storage system too, but that isn't really what it is designed for.
CollegiateLink	1,2,3	The closest thing out there to OrgSync. It was rated second in the initial bid because it didn't offer webhosting, didn't have a mobile version, and the user interface looked dated and less aesthetically pleasing (which is important to student adoption). Since then, it has seemed to stall a bit as a company with little to no new features apparent on their website.
VU IT Solution	1,2 (hypothetically) 3 (maybe)	This option was discussed prior to the initial OrgSync purchase with the thought of developing an in-house system that would handle at least the more necessary/bare bones features (e.g. online and automated club registration and listing and some basic communication and productivity tools). Recent conversations with VU IT indicate that this would be even less likely now since there are other web-based needs in the organization that would be wise to prioritize. And there is a realization that we do not have the staffing that would be able to keep pace with the frequent upgrades that are coming from OrgSync on a regular basis.
Back to Pen/Paper/Eforms	None	Please no.

Currently in Development

a. **AS Calendar Integration—** Combining the information on the OrgSync calendar (club meeting times and club events) with the events displayed on the AS-wide calendar. A new look and functionality has been designed by VU IT which uses the newly purchased OrgSync API, and this will be ready for roll out in the coming weeks.

b. **Placement on MyWestern as Involvement Hub—**Will increase traffic flow to OrgSync, thus increasing students' opportunities to get involved on campus and connected with the AS, also driving students to the new version of the calendar.

c. **Importing all students—**Working with Registar's office to have students' WWU accounts imported into OrgSync. Students would have fewer steps to complete when logging into OrgSync for the first time and this would increase browsing event and involvement opportunities, fostering a more engaged virtual community (segue into...)

d. **Viking Village—**Centralizing an online community for Western students. Viking Village is looking for a new home and has strong interest in OrgSync due to the company's stable tech resources.

e. **Ree Center joining in (Res Life are in talks too)—**WWU's Ree Center currently does not have a centralized online location where the Ree Center and its sports clubs can organize themselves. The Ree Center would operate (and pay for) its own "umbrella" to manage its organizations.

f. **Smartphone app** - OrgSync (not WWU) is working on a new app that would allow for greater functioning on smart devices than their current mobile web version.

Possible Future Developments

a. **Streamlining the ER process by using the Forms Tool and/or Budget Management System** - This would centralize one of our key forms and add powerful data crunching functionality.

b. **Streamlining Financial and Business Processes even Further (using forms and/or BMS - ER, Benefit Request Form, Travel Approval)** - The Budget Management System (BMS) would combine the AS allocation process, budget request process, and expenditure request process into a unified feature with live updating balances and no duplicate entry as well as powerful data mining and pre-programmed routing chains for approvals.

c. **Card Swipe** - Would provide an unobtrusive way to quickly collect student demographic data for event attendees and users of services, as well as tracking attendance and clocking in/out for volunteers.

d. **Service Management System** - An add-on that the Center for Service Learning may be interested in purchasing and operating someday.

e. **More widespread AS Committee Usage—**The AS Committee system currently uses OrgSync for AS committee appointments. More committees could look at the Activities Council and model after it. Currently ASAC uses OrgSync for cloud storage and in-meeting review of documents, which has been especially useful for non-employee committee members who don't have access to the Q drive or employee email.

Financial Commitment

SCENARIO -1 (staying at 300 portals and remaining the only campus entity using the system)

OrgSync Annual costs		AS Portion
Umbrella xl	$1,500	$1,500
Portals Subscription: 201 - 300	$11,000	$11,000
API (Application Programming Interface)	$3,000	$3,000
Budget Management System	$3,500	$2,500 (discount granted)
TOTAL	$19,000	$18,000 (per year w/o multi-year discount)
		3-year deal: $48,600 (w/$5,400 discount) = $16,200 per year
		5-year deal: $76,500 (w/$13,500 discount) = $15,300 per year

SCENARIO - 2 (staying at 300 portals and having the Ree Center on-board)

OrgSync Annual costs		Ree Center Portion	AS Portion
Umbrella x2	$3,000	$1,500	$1,500
Portals Subscription: 201 - 300	$11,000	$1,100 (30 portals = 10%)	$9,900 (270 portals)
API (Application Programming Interface)	$3,000	$0 (if utilized later, could share cost then)	$3,000
Budget Management System	$3,500 (discounting WWU at $2,500)	$500	$2,000
TOTAL	$20,500 ($19,500)	$3,100	$16,400 (per year w/o multi-year discount)
	3-year deal: $48,600 (w/$5,400 discount) + Ree Center transfers of $4,800 = $14,600 per year		
	5-year deal: $76,500 (w/$13,500 discount) + Ree Center transfers of $8,000 = $13,700 per year		

SCENARIO - 3 (moving up to 500 portals because a third campus partner joins in)

OrgSync Annual costs		Ree Center Portion	3rd Partner Portion	AS Portion
Umbrella x3	$4,500	$1,500	$1,500	$1,500
Portals Subscription: 301 - 500	$13,500	$1,350 (50 portals = 10%)	$1,350 (50 portals = 10%)	$10,800 (400 portals)
API (Application Programming Interface)	$4,000	$0 (if utilized later, could share cost then)	$0 (if utilized later, could share cost then)	$4,000
Budget Management System	$5,000 (discounting WWU at $2,500)	$500	$500	$1,500
TOTAL	$27,000 ($24,500)	$3,350	$3,350	$17,800
	3-year deal: $58,050 (w/$6,450 discount) + Campus Partner transfers of $11,100 = $15,650 per year			
	5-year deal: $91,325 (w/$16,175 discount) + Campus Partner transfers of $18,500 = $14,565 per year			

Closing Thoughts:

• During the 3 years of using OrgSync, there has been steady growth and a gradual broadening and deepening of integration and experimentation with the tools offered.

• There is still room to grow further with campus-wide adoption and awareness of the system's capabilities and for more students to see OrgSync as the "Involvement Hub" we are moving it toward. Several of the developments mentioned above are well-poised to create gains in this area.

• There is not an alternative service/product available that matches the quality and innovation of OrgSync.

• The funds spent to subscribe to OrgSync annually will not result in cost much greater than the salary of one student director position, and would equate to approximately one-third of the salary of one high-qualified professional IT staff person. And since OrgSync allows us to benefit from the hard work of a 40+ person developer team constantly trying to be as fluid as possible to meet the needs of over 300 campuses, this cost seems like a very good bargain.

• Thank you for taking the time to read this entire document and for thoughtfully considering the proposal.