

# Bringing Committees Up To Web Speed

*Integrating Microsoft SharePoint, Office, and iMIS*

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## Challenges for Association Committees

Committees and councils are at the heart of association governance activities. Today's committee volunteers are the association leadership of tomorrow. But significant challenges face today's committee members:

- Committee-related expenses are growing faster than association revenues;
- Document, calendar, and contact list management are burdensome & time-consuming for staff members in their role as committee liaison;
- Members are increasingly hesitant to volunteer because of the time burden required for committee participation.

At the same time, associations realize that getting and keeping volunteers engaged is a key motivating factor to continued membership. A recent study by ASAE shows that members who serve on a committee are 53% more likely to recommend the association than those who have no volunteer involvement!

## Association executives are asking themselves:

- Are our committee members participating as fully and as efficiently as they could?
- How much of our committee volunteers' valuable time is spent in frustration, asking where to find something they need, preparing project status reports, and searching for the most recent version of a document?
- Are our committees straining their budgets and placing excessive demands on their volunteers' time, due to communication gaps and the lack of a centralized information sharing site?
- How much of our committee liaison's valuable time is taken up with back-and-forth e-mail communications, scheduling, meeting logistics, manual distribution of information, and the laborious task of sorting out multiple sets of document revisions?
- What if we could streamline these tasks and give our committee members online access to a shared work area, using the same Microsoft Office tools they are already comfortable with?

## ISG's Committee Websites

*ISG offers associations an opportunity to revolutionize the way their committees work, by giving each committee real-time online access to its own dedicated, tailored website.*

These private websites serve as both **communications hub** and **productivity center** for committee members and staff liaisons, giving them intuitive and efficient tools for working in an environment that is rich with context and information resources.

The design of these dedicated committee websites draws on ISG's 15 years of experience consulting with associations, and its expertise in advanced web and systems integration technology. We have combined the strengths of three powerful systems into one easy-to-use solution:

- The website administration, document and forms management, Web 2.0 features, e-mail alerts and workflow automation of the new **Microsoft SharePoint 2007**;
- The familiar and accessible user interface of **Microsoft Office** (Outlook, Word, Excel);
- The unified login, security groups and centralized data management of **iMIS**.

## Limitations of Alternative Technologies

The volunteers and staff liaisons working in committees have been left without much technology support when they need to contact each other, schedule meetings, distribute documents for discussion, send each other updates, prepare and edit drafts of standards, compile research relevant materials, make decisions, vote, and prepare reports on the results of their work. Associations have been able to offer their committees limited support because the technology tools available to them were inadequate by themselves:

- **Association management systems**, such as *iMIS*, have always been oriented around after-the-fact record-keeping, rather than actual live processes. While they have tools to maintain committee rosters, they offer no tools to help members actually do the collaborative work that the association needs them to do.
- **General communication tools**, such as Microsoft Outlook, support fragmented communications, using e-mail lists which may or may not be accurate, with each message and attachment essentially unrelated to others, so they are used mostly for one-way announcements from the liaison to the members.
- **Calendaring tools**, including Outlook, have not allowed staff to share calendars with outside volunteers in real-time, so that scheduling is a trial and error process, and each committee member bears the responsibility of tracking committee meetings within their own system.
- **Online discussion forums and listservs** are organized in linear structures that ignore the context of meetings, tasks, and materials. As a result, it is difficult to search for and extract meaningful decisions from the back-and-forth chatter, and hard to understand new issues in light of previous resolutions.
- **Online document libraries** have been useful primarily as static archives. But they are difficult to add to, search, update and distribute, and they have no features to control collaborative document revisions or sort through multiple versions of the same document.
- **Dedicated committee applications**, including earlier versions of Microsoft SharePoint, have been under-utilized by participants because the online user interface has been awkward and unintuitive, security has been separated from the committee and contact management data maintained in *iMIS*, and few features existed to support the actual processes of the committee, such as voting, scheduling, nominations, and document approvals.

## Features of ISG's Committee Website Solution

Instead of offering a group of generic tools, ISG provides associations with a fully configured set of websites that have been specifically designed to support the processes and information-sharing needs of association committees, including:

### 1. Ready-to-deploy committee websites, fully configured by ISG

Out-of-the-box, each committee's website is populated and organized with pages and features required to support standard association committee processes, including committee home page, committee calendar, navigation menus, search forms, document library, selected news feeds, committee directory, discussions, and workspaces for committee meetings and works in progress.

### 2. Website administration and content management

Each committee's website can be separately administered using standard SharePoint 2007 administrative forms, so the committee liaisons and officers of each committee can manage their own site. The SharePoint 2007 Content Management System (CMS) allows authorized committee members to add and change web pages and images, customizing the look and feel of the site and adding and moving features of each site as needed.

### 3. Single sign-on between SharePoint 2007 and *iMIS*

The ISGweb unified login provides *iMIS*-driven secure access to the committee website for external participants, volunteers and staff, without requiring users to go through a second login from the association website, and without having to add committee members into the association's internal network.

#### 4. Website security directly based on *iMIS* committee rosters

ISG's integration logic allows the security for each site to be based on SharePoint groups that are defined by real-time access to *iMIS* committee and profile data, so that contact data is always up to date with the centralized database, and each user's online access is updated automatically when committee roles and terms change.

#### 5. Personalized home page for each committee member

Each committee user has his/her own "My Site," including a personalized home page where users can view and update their *iMIS* profile, and access the community forums they belong to. This page provides one central place where users can find the new postings from all the committees they belong to, collect links to their own selection of association-related web pages and documents, and view their own calendar and tasks.

#### 6. Web 2.0 collaboration tools, including blogs and wikis

The new Web 2.0 features of SharePoint 2007 make it easy for authorized committee members to use blogs to post status updates and announcements that are immediately visible by the rest of the committee, and get feedback from others. Wikis (editable web pages) also make it easy for multiple members of a committee to submit new information to the website directly, without requiring intervention by a webmaster, and to update official references, such as standard operating procedures and position statements.

#### 7. Updates directly via Microsoft Word

Because the committee website is based on Microsoft technology, committee members do not have to learn a separate user interface for updating information on the website – they continue to use the same MS Office products that they already use internally. For instance, they can post a status report to the committee by doing their typing in MS Word, and instead of saving it as a document on their internal network, select a Word menu option to "Publish" it to the web as a blog entry or html page, or file it as a document in one of the libraries on the committee website.

#### 8. Centralized committee calendar

Each committee has its own searchable calendar of events, which can be maintained directly through its website. Committee members can also view committee meetings directly from their own personal Outlook and check the availability of other committee members for scheduling. The calendar can display a mix of committee-only events and association-wide events from *iMIS*, so users can register directly from the committee calendar. Organizers can use the meeting workspaces to list attendees, and post the agenda, documents for review, and the minutes. This allows committee members to review results of previous meetings and prepare for upcoming meetings.

#### 9. Document management with check-in/check-out and workspaces for work in progress

Committee members generally have many different types of document management tasks, including searching for information, composing documents, and uploading relevant materials. Separate workspaces for editing work-in-progress allows team members to assign and track tasks and deadlines, and collect input for creating, compiling, and revising documents collaboratively. Multiple versions of a document can be tracked through controlled version numbering, and automatically published to committee-wide libraries upon approval. Documents of all types, including spreadsheets and media files, can be uploaded into organized libraries and classified appropriately.

#### 10. Searchable libraries

Committee members can search entire online libraries with ease. Custom attributes, such as keywords, topics, department and author, can be applied to all uploaded documents to make indexing and searching easy, and a new sophisticated search logic allows users to search across folders for text within the body of all types of documents – even inside pdf's. Search results, including any type of file, can be saved for future reference as favorite links.

#### 11. Automated workflow logic for document feedback and approvals

Committees often deal with information that is constantly changing through the actions of the committee members themselves. Accordingly, ISG's Committee Websites include the ability to initiate action automatically according to predefined workflow steps. Workflows can be used to spur a multi-step process along by routing information to a group of users, soliciting feedback, alerting reviewers and supervisors to new developments, and changing status and location of documents. These automated steps can also be designed to trigger new events conditionally. For example, one type of action might be taken upon a reviewer's rejection, and another action upon the reviewer's approval.

## 12. Nominations and voting

Committee members can access and complete their own custom web-based forms to nominate individuals for committee positions and vote on the nominees. Because of the real-time integration with *iMIS*, profile and background information for the nominees is drawn directly from their *iMIS* contact record, demographics and activity data; and voting results can be stored in *iMIS* as part of their activity profile. Committee forms can also include surveys and voting on many different types of ballots, including changes in bylaws and legislative positions.

## 13. Committee directories

Integration with *iMIS* makes it easy for committee members to obtain lists of committee officers and members and contact them directly. They can also locate members, experts, and other contacts from the membership database, either by a simple search string or using an advanced directory, and drill down to view details drawn from *iMIS* records.

## Benefits of ISG's Committee Websites

Instead of the heavily manual, time-consuming tasks currently undertaken by committee liaisons and volunteers, committee members will find it easy to find all the information they need on their website whenever they need it. For example:

- Committee members can review and update the status of the tasks assigned to them, and can write up progress reports in Word and post them to the committee as blog entries.
- Information for upcoming meetings can be collected in a dedicated meeting workspace, along with links to relevant documents, already uploaded to the website for review, and minutes from the previous meeting are posted on the website for review.
- Scheduling within a committee can be as easy as if all the committee members worked for the same organization, because of the sharing of calendars.
- Instead of waiting for the committee liaison to send out copies of a draft document to collect feedback and compile revisions, the committee members can check out the document themselves, review other members' revisions to date, and submit their own revisions using Word to track changes and comments.
- On schedule, the website workflow automatically sends out e-mail alerts with the document draft attached when it is ready for the approval process, and updates the document status depending on the results.
- Members can vote on nominees by position without requiring a special ballot preparation process by the committee liaison, because the nominees are flagged for the balloting and are profiled in depth using data drawn directly out of *iMIS*.

## With this type of streamlined and automated team support, association executives can confidently answer:

- YES**, my committee members are participating fully and efficiently, and are accomplishing a great deal in very little time, with little to no frustration, because they have all the information where and when they need it, and communication is centralized.
- YES**, my committee liaison's valuable time is dedicated to providing meaningful assistance and interaction with the committee members, because little logistical and manual effort is required.