

## AMS Frequently Asked Questions

### What is an Association Management System (AMS)?

An Association Management System (AMS) is the technology platform that helps NABIP manage membership, events, communications, reporting, chapter operations, and other core business functions. It serves as the central system that supports the member experience and day-to-day operations of the association.

### Why is NABIP replacing its current AMS?

NABIP has relied on its current membership management platform for more than 20 years. The system is approaching end-of-life, with vendor support ending in 2027. In addition, many processes require manual work, third-party support, and workarounds that limit efficiency and access to meaningful member data.

A modern AMS will provide a more secure, scalable, and integrated platform that better supports members, chapters, volunteer leaders, and staff.

### Why was re:Members selected?

re:Members offers a centralized platform designed specifically for associations. It combines membership management, event registration, engagement tracking, payments, reporting, and chapter support in a single system while integrating with NABIP's existing technology tools.

The platform provides the flexibility and scalability needed to support NABIP's future growth and evolving member needs.

### How will this improve the member experience?

Members will benefit from:

- Easier management of membership records and payments
- Self-service password resets
- A single login experience
- Simplified event registration
- Better access to professional development and member resources
- More personalized communications and engagement opportunities

The goal is to make interactions with NABIP easier, more efficient, and more valuable.

## **How will this improve chapter operations?**

The new system is designed to make running a chapter easier, more efficient, and less time-consuming.

Today, many chapter leaders spend significant time managing memberships, event registrations, officer transitions, financial processes, reporting, websites, and communications across multiple systems. The new platform brings these activities together in one place, helping reduce manual work and administrative burdens.

### ***Chapters will benefit from:***

- Easier membership management and renewals
- Simpler event registration and attendee tracking
- Better communication tools to engage and grow membership
- Centralized officer and leadership records to support smoother transitions
- Improved financial and administrative management, including support for banking, taxes, and compliance activities
- Access to real-time membership and engagement data to help leaders make informed decisions
- Reduced duplicate data entry and fewer manual processes

By streamlining many of the tasks currently handled through separate systems, spreadsheets, and manual processes, chapters may also see operational savings over time through reduced administrative costs and less reliance on multiple tools, platforms, and service providers. Consolidating key chapter functions into a single system can help improve efficiency, reduce complexity, and free up volunteer leaders to focus on serving members rather than managing administrative tasks.

In addition to the technology itself, chapters will receive training, resources, and ongoing support to help leaders confidently use the system. The goal is to allow volunteer leaders to spend less time on administrative work and more time focusing on member engagement, recruitment, programming, and chapter growth.

## **How will re:Members support member and chapter engagement?**

re:Members provides enhanced reporting and analytics that help NABIP better understand member interests, participation, and engagement trends.

These insights will allow NABIP and chapter leaders to make more informed decisions, deliver more relevant programs, strengthen member relationships, and improve retention over time.

## **Will re:Members integrate with NABIP's existing systems?**

Yes. re:Members is designed to integrate with key systems currently used by NABIP, including Informz, RealMagnet, AirTable, Slayte, Solomon, Constant Contact, and Umbraco. These integrations will reduce duplicate data entry, improve reporting, and create a more seamless experience for members and staff.

## How secure is the re:Members platform?

re:Members is hosted in an environment that has achieved SOC 2 Type 1 certification, demonstrating that key security controls and processes have been independently reviewed against recognized industry standards.

A SOC 2 Type 1 report verifies that security controls were properly designed and in place at the time of the audit. This provides independent validation of the organization's approach to data security, access management, infrastructure controls, and risk management.

By maintaining SOC 2 Type 1 certification, re:Members demonstrates its commitment to protecting member information and providing a secure, reliable platform.

## How will this investment benefit NABIP in the long-term?

Implementing a modern AMS is more than a technology upgrade. It is an investment in NABIP's ability to:

- Improve the member experience
- Strengthen chapter support
- Increase operational efficiency
- Improve access to meaningful data and reporting
- Support membership growth and retention
- Create a scalable foundation for future organizational needs

Ultimately, the AMS will help NABIP better serve members while positioning the organization for long-term success.

## How is the proposed dues increase different from the AMS donation request?

In short: they support two different purposes.

The **proposed national dues increase** is intended to strengthen NABIP's overall financial sustainability and support core organizational priorities, including advocacy, member engagement, chapter support, operational improvements, technology modernization, cybersecurity, and critical infrastructure investments. If approved by the House of Delegates, the additional dues revenue would become part of NABIP's annual operating budget and help ensure the association has the resources needed to serve members today and into the future.

The **technology fundraising campaign** is a separate, voluntary effort focused specifically on supporting and enhancing NABIP's new Association Management System (AMS). Donations help fund implementation, training, chapter adoption, and future enhancements that improve the member and chapter experience.

### Simply put:

- **Dues support NABIP's overall operations and long-term sustainability.**
- **AMS donations support the implementation and enhancement of the AMS platform.**
- **The dues increase requires approval by the House of Delegates.**

- **AMS donations are voluntary contributions designated for the AMS initiative.**

## **Are AMS donations being requested because the dues increase isn't enough?**

No.

The proposed dues increase and the technology fundraising campaign are separate efforts with distinct purposes. The dues proposal is designed to support NABIP's overall operations, advocacy efforts, member services, chapter support, technology investments, and long-term financial sustainability.

AMS donations are not intended to fund NABIP's day-to-day operations. Instead, they provide members, chapters, and supporters with an opportunity to invest directly in the success, expansion, and long-term value of the AMS platform.

While both initiatives contribute to a stronger NABIP, one supports the association as a whole, while the other supports a specific technology investment that will benefit members and chapters for years to come.

**Approval of the dues increase does not eliminate the need for AMS donations, and AMS donations are not intended to replace the financial stability provided by member dues. Each serves a different purpose and supports a different aspect of NABIP's future success.**