

# Direct Support Organizations (DSO) Technology Committee

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## Meeting Minutes

Monday, May 18, 2026 | 6:00pm – 7:30 pm EST | Location: Virtual (Zoom)

### Call to Order

The meeting of the DSO Technology Committee was called to order at approximately 6:00 PM. The meeting was publicly noticed and conducted in accordance with Florida Sunshine Law requirements.

### Roll Call - Members present included:

Cheksha Kidd, Consulting Partner / PMO Lead/Neutral Facilitator

- Artisha Polk
- Brandon Moore
- Donna Allen
- Nelson Grillo
- William Youmans
- Yolanda Pinkard
- Zachary Ansley
- Jeanwill Marcelin
- Avis Payne

### Also present:

Lauren Daley, AlmaBase

Sabangale Magabane, Consultant

Dr. Brandye Tatum-Fedrick was absent due to a previously scheduled fundraising engagement.

A quorum was not formally established as this meeting was informational and organizational in nature.

### Discussion Items

#### **A. AlmaBase Platform Demonstration and Technology Discussion**

Ms. Kidd introduced Lauren Daley of AlmaBase, who provided a demonstration of the AlmaBase digital engagement platform and reviewed functionality related to alumni engagement, membership management, communications, reporting, and administrative capabilities.

Ms. Daley noted that the University currently utilizes portions of the AlmaBase platform through University Advancement and explained that additional membership functionality specific to the DSO initiative would be custom-built during implementation.

#### Platform Functionality Discussed

The presentation included demonstrations and discussion regarding:

- User profile creation and management
- Alumni directory and alumni map functionality
- Communication tools and engagement spaces
- Chapter- and organization-based spaces and moderation
- Automated communications and subscription management
- Business directory and mentorship capabilities
- Career center and internship/job board functions
- Data synchronization with Blackbaud NXT
- Reporting and analytics capabilities
- Administrative and moderator access structures

#### **B. Membership and User Access**

Committee members discussed the proposed membership workflow, including:

- onboarding of new users,
- verification requirements,
- handling users not currently in the University database,

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- bulk membership uploads,
- and accommodations for non-digital users

Ms. Kidd clarified that membership workflows and onboarding procedures would be developed collaboratively during implementation and user-flow design sessions with AlmaBase and Blackbaud advisory teams.

## **C. Privacy and Visibility Controls**

Committee members raised concerns regarding user privacy, visibility of profile information, and administrative control over searchable member information. AlmaBase representatives indicated that users may control visibility of profile details and that additional functionality related to searchable visibility was under review.

## **D. Governance and Administrative Roles**

The Committee discussed role-based access controls, including distinctions between administrators and moderators, as well as governance considerations related to:

- data access,
- chapter-level management,
- and organizational reporting permissions

## **E. Data Structure and Reporting**

Discussion included:

- data models,
- reporting requirements,
- Power BI integration through Blackbaud,
- analytics functionality,
- and the importance of defining business requirements prior to implementation

Committee members emphasized the need for:

- standardized data structures,
- clear reporting requirements,
- sandbox/testing environments,
- and documentation of existing business processes before implementation proceeds

## **F. DSO and Membership Segmentation**

The Committee discussed the importance of ensuring that:

- various DSOs maintain appropriate segmentation of member data,
- organizations can communicate independently,
- and non-alumni supporters and associate members may participate where appropriate.

## **G. Future Implementation Planning**

Ms. Kidd advised that implementation would occur in phases, beginning with booster organizations, followed by broader integration efforts for the National Alumni Association and additional DSOs. Future meetings will focus on:

- business requirements,
- user flows,
- data architecture,
- reporting structures,
- and implementation timelines.

## **Adjournment**

The meeting adjourned at approximately 7:34 pm EST.