



EXPERT FINDER SYSTEMS

INTERNATIONAL FORUM

EXECUTIVE BOARD REPORT

Report on Activities

September 2025

The organization is a forum for and an advocate of the expert finder and research information management systems community of practice. The objective of the organization is to provide leadership to advance learning, research, scholarly communication, information management, and professional practice for the development, promotion, and improvement of expertise and research information systems and related software and platforms.

This report outlines the activities the EFS Executive Board has been actively working on for the last two years in the hope of creating a strategy that supports ongoing sustainability. Most of our work has focused on building an infrastructure to support the organization and management of the Expert Finder Systems (EFS) Forum.

Activities 2023-2025

Activity 1: Create Organization Name, Mission, Vision, and Goals

Coming up with a new organization name, mission, vision, and goals that would encompass and broaden the scope of its membership was a challenge.

Name

The Executive Board organized a number of opportunities for community and EFS committee members to provide input on prospective new names for the organization. This included a survey at the end of the 2023 conference, along with multiple email discussions and group brainstorming sessions.

In April 2025, the Executive Board presented this final list of possible names to the EFS Planning Committee:

- Association for Expertise and Research Information Systems (AERIS)
- Association for Research Information and Expertise Systems (ARIES)
- Expertise and Research Information System Association (ERISA)
- Association for Expertise and Research Systems (AERS).

We did not get a definitive result. The Executive Board is currently exploring more options.

Mission

To advance the domain of scholarly, corporate, non-profit, and other professional expertise profile systems by fostering collaboration, research, publication, education, and best practices.

Vision/Goals

- To become a premier organization of users, practitioners, and scholars of expertise, information, and analytics systems
- To grow the organization to include the breadth and depth of emerging platforms and technologies
- To create and expand institutional and individual affiliations that include the broad spectrum of emerging technologies, platforms, and concepts, such as Research Information Management

Systems (RIMS), Current Research Information Systems (CRIS), Faculty Activity Reporting System (FARS), Business Experts Systems (BES), profiles, persistent identifiers, ontologies, professional networking, matchmaking, and related artificial intelligence applications

Activity 2: Create Governing Documents

Bylaws: Draft Bylaws were developed and sent out for Planning Committee review. Feedback was provided and the Bylaws were revised based on recommendations.

The revised version was accepted by the Executive Board as provisional and will be piloted starting in late 2025.

Note: The **Articles of Incorporation** will be created once the Executive Board initiates the legal paperwork to become a non-profit organization.

Activity 3: Create an Organization Website

Previously, EFS websites were event focused. A home site was created (by FSU/CIMES) to handle the organization's content, marketing, recruitment, resources, and events. The site also includes a slideshow that promotes related external events. The site includes the following new features:

- Slide Show – Features current events, publications, and resources
- Join Committees, Mailing List, and suggest Webinar Topics forms added
- Repository – A digital portal where outputs from many EFS activities are distributed—including videos, presentations, and posters from EFS forums and webinars.
- Resources
 - Directory of US Research Information Systems
 - Publications – canned searches in OpenAlex and Google Scholar
- Events – Links to all past and present event (including webinars) sites and pages
- Organization website – <https://expertfindersystems.org>

Activity 4: Benchmark and Explore Partnering with Similar Organizations

The Board met with these organizations for the purpose of benchmarking and to explore the possibility of partnering for either administration or event management.

- Research Analytics Summit
- Lyrasis
- Charleston Conference
- Annual Reviews (owner of Charleston Conference)
- EuroCRIS

Activity 5: Identify and Meet with Potential Association Management Companies

The Board met with these organizations to determine the viability of contracting to handle administrative and fiscal services and to aid in becoming a non-profit organization.

- AMR Management Services
- Partners in Association Management
- Association Management Solutions
- BryteBridge

Activity 6: Identify and Review Association and Event Management Digital Platforms

The Board has been seeking an all-in-one digital platform that includes all the tools for managing and communicating with the stakeholders not rooted in a specific institution. The following vendor was interviewed recently:

- Glue Up

Activity 7: Support for the 2025 EFS Forum

The Executive Board has provided support in organizing the 2025 Forum through both strategic and practical contributions. The Board worked closely with the Planning and Program Committees to help shape the vision, theme, and goals of the event, guided program development, and supported the identification of engaging session topics and speakers. They also contributed to financial stewardship, partnership building, and promotional efforts. In addition, the Board offered logistical guidance on operations, registration, and technology planning, as well as advice on volunteer coordination and evaluation processes to sustain future success. The following lists specific activities:

- Identified and procured sites and hotels for an event in Cleveland (later moved to a virtual event due to funding cuts all over the country)
- Recruited the planning committee
- Procured an event management platform (Whova)
- Worked with the Planning and Program Committees to align the conference program with the organization's mission and to coordinate logistics (including scheduling and technology support)
- Provided Zoom services to integrate within Whova (with multiple hosts)
- Handled courtesy appointments for Zoom access

Activity 8: Fiscal Management

The organization's funds are housed at Florida State University, Center for Information Management and Educational Services. The funds are subject to all the same rules and regulations as other accounts at the university. Specific activities included the following:

- Handled agreements with event site, hotels, and Whova (site and hotels for the in-person Cleveland event)
- Purchased Whova subscription and add-on modules
- Collected and refunded money from registration and sponsors
- Explored options for vendors to take over fiscal management from FSU

Future Goals

The future goals of the organization include but are not limited to the following:

- Becoming a **membership** organization
- Establishing **non-profit status**
- Creating a peer-reviewed **e-journal**
- Providing **discussion boards** to build the community
- Creating a dedicated **marketing campaign** on the value of research information systems

Executive Board

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Scholarly Services Librarian & Assistant Professor
Oklahoma State University

Jeff Agnoli, Past Chair

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