American Planning Association
California Chapter
Making Great Communities Happen

WEBSITE 3.0: Objectives + Scope

The following is a working document that outlines the **objectives** and **scope of work** envisioned for the APA California website once it has been completely migrated to a new web management contractor. Please note that eventhough the list is extensive, most (if not all) of these individual functions/ modules could conceivably be handled under one single package based on preliminary discussions. Therefore, this document will ultimately be the basis to determine : a) contractor capabilities; b) costs; and c) timeframe. Please take a moment to review carefully and come prepared with your remarks and suggestions for changes and/or additions.

OBJECTIVES	SCOPE OF WORK
Frontend	
1. Fully Integrated w/in a *Responsive* Web Architecture	Develop website architecture that will include all components (chapter news, conference, publications, award submissions, etc .) into one site, thereby requiring a single log-in, and to include: **1.** General Information - to include the current site organization and content (with some modifications), but to be ported to a *responsive* web architecture for mobile applications. **A.** Search Engine i. Full-text search capabilities of the site should include the ability for users to search selected content (articles, events, conference presentations, etc.). ii. articles should also be searchable via outside search engines (i.e., Google, Bing, etc.) **B.** Events Calendar - to include ability to post ongoing distance education webcasts i. Registration and payment system ii. ability for Sections to add events **C.** Planning news and related articles (state bills that **D.** Conference portal (to be embedded within site) **2.** Member Only Content **A.** Member Database **B.** eMail System **C.** Election System **D.** Survey and Polling System **E.** Library/ Archives i. Videos ii. Images iii. Documents
2. Visually Enhanced Layout and User-friendly Organization	Better use of the Homepage's digital *real estate* and navigation capabilities **1.** Priority Information (*navigation, news alerts, sponsors, etc*) on Homepage is visible with minimal scrolling. Secondary material to be scrolled as deemed appropriate and effective. **2.** Member Only Content area should be more distinguishable from General Public Areas. **3.** Self-Help/ FAQ area ("How-to" or "Step-by-Step" pages) to be more prominent and easier to navigate.

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	4. Sponsors/ partners in a more visible area **5.** Better landing page navigation, especially to return to the Homepage **6.** Consider making certain content panes static
3. Automated Self-ommunicating Capabilities (i.e., internalized *scraping*)	Develop capabilities so that certain content from the website's landing pages, social networks *, etc can be automatically captured and used in other areas of website or for other forms of communications. **1.** To generate content and tags/ links for homepage (think of it as a "*CA Planning News Feed*") **2.** For content management of emails, eBlasts and other forms of communications.
4. Networking/ Member Exchange	Build a platform that allows members to view and exchange news, ideas, continuing education opportunities, etc. **1.** Develop an area that can be a member content management platform **2.** Integration with social networks such as LinkedIn, Facebook, or other social networks*
Backend	
5. Integrated eCommerce System w/ Reporting	Provide an integrated eCommerce System that can generate reports: **1.** For sales of Job Ads, Chapter-Only membership and Consultant Directory. **2.** Three payment options: credit card (VISA & MasterCard, only), eCheck or mail check. **A.** Credit Card and eCheck options require account information to be entered and sales completed. i. Service dates to be automatically activated upon completion of payment for Chapter-Only and Consultants Directory. • New services dates to be shown also on a confirmation email that purchaser would automatically receive after purchase. ii. Job ad service dates automatically activated for 30 days from date of payment (credit card, eCheck and mailed check). • Automatic deactivation after 30 days. **B.** Mail check option puts job ad, membership or consultant directory ad in Pending status until payment is recorded by Administrator. i. Ability to enter payment ii. Confirmation email automatically sent when payment is recorded. iii. Services dates: same as 2.i. and 2.i.1. **3.** 30/60/90 day renewal notices for Chapter-Only membership and Consultants Directory automatically set from payment date whether by credit card, eCheck or mailed check. **4.** Ability to process, online, full or partial refunds for job ads, Chapter-Only membership and Consultant Directory. **5.** Automatic eMail confirmation after any transaction type (sale, refund). • Ability to customize eMail messages (throughout system). **6.** Staff to receive copies of the payment confirmation eMails. **7.** Staff receive copies of Authorize.net payment information.

OBJECTIVES	SCOPE OF WORK

8. Ability to run report(s) for sales or refunds based on filtered criteria:
   - **A.** Job Ad
   - **B.** Chapter-Only Membership
   - **C.** Consultants Directory
   - **D.** Dates:
     - i. Day
     - ii. Week
     - iii. Month
     - iv. From Date/To Date (if all four are not possible, From Date/To Date is most desired.
   - **E.** Information on Report:
     - i. Job Ads
       - a. Payment ID
         - Ability to drill down to actual job ad record
       - b. Payment Date
       - c. Name of Payee (not user unless the same)
       - d. Invoice Number
       - e. Invoice Date
       - f. Invoice Amount
       - g. Payment Amount
       - h. Balance Due
         - If any, ie: mailed check not received.
       - i. Transaction ID
     - ii. Consultants Directory
       - Same as Job Ads i. >> a - i
     - iii. Chapter-Only Memberships
       - a. Member ID
       - b. Ability to drill down to actual member account
       - c. Join Date
       - d. Name of Payee (*not user unless the same*)
       - e. Invoice ID
       - f. Invoice Date
       - g. Invoice Amount

6. Check-payment Capabilities

Provide eCheck payment option for job ads, chapter-only membership and consultant directory.

1. For user to be able to pay for these items with an eCheck instead of using a credit card or mail in a check.
2. eCheck to be processed through established APA California Authorize.net account.
3. Receipts provided to user and membership@ after completion of payment to include:
   - **A.** Date of payment
   - **B.** Corresponding job ad #, chapter- only membership # or consultant directory id number.

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	C. Name of payee (from eCheck account, not user information unless they are the same) **D.** Transaction/invoice identification number (that is also transmitted to Authorize.net) **E.** Authorization number **F.** Amount paid **G.** Last four digits of account number **H.** Billing Address **4.** Refunds can be processed through eCommerce. **5.** A report in eCommerce of sales/refunds with date(s) able to be filtered (day/week/month or from date/to date).
7. Management of Member Database	Provide access and automation to accommodate and more efficiently manage membership. 1. Membership Management a. Member Database - accommodate 5,000 + members b. Billing System - 30, 60 and 90 day reminders c. Members to have ability to create and edit their profiles d. Check statue of CM for AICP
8. Conference Management	Develop automated capabilities to manage the full range of conference management needs. 1. Presentation Proposals – abstracts and proposals from those wishing to present at the conference. This includes web-based review of the proposals by the review committee, email notification of acceptance/rejection, and printed reports that would list all proposal information, including any attachments and images. 2. Conference Registration and Payment – Members and non-members are to be able to register and pay online. Cost should be determined by (1) when the person is registering (early, late, or in-between) and (2) who the person is (member, non-member, or other designations). There has been some interest by the 2015 CHC to include session selection during the registration process. This would affect the production and deadlines of other processes such as the proposal submission/review/selection/notification processes, the online program, conference-at-a-glance, etc. 3. Receipts and Integration with Payment Processors – Payments should be processed at the time of registration through Authorize.net and receipts (which include confirmation of what the attendee signed up for) should be generated and distributed. 4. Publication of Presentations – A mechanism should be included where selected presentations can be published online. It's understood that some of the slide decks and other files can grow very large. 5. Reporting – A variety of reports should be available in Word, PDF and Excel/CSV formats.

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9. Member Communications	Build capabilities to generate distribution modules from within website using embedded database. 1. Broadcast Emails (e-Blasts) and other news alerts a. Emails from membership database b. Include ability to create user groups c. Ability to import other user groups (i.e. AICP/FAICP lists) 2. Digital Reader capabilities (CalPlanner) a. Internal module that allows viewing within site b. Provide enhanced PDF viewing offline
10. Content Management and Reporting	Design the website so that staff and Board members can add/delete content and better understand how users are using the site. **1.** Custom reporting to analyze website usage and downloads **2.** Forms Builder - build custom web-based forms to allow anyone to fill out forms on a website • Can be used to submit requests, provide feedback, ask questions, and more. **3.** Ability to archive pages with reoccurring content **4.** Allow different levels of backend access to different Exec Board Members to be able to manage their own content