



American Planning Association
California Chapter
Making Communities Great

08 January 2015

TO: APA California Board of Directors

FR: Marc Yeber, VP-Public Information

RE: APA Californai Website v2.0

During the first quarter of 2015, the Chapter will need to start preparing for the transition to a new website management contractor. As has been previously noted, the current website is not fully functioning as originally intended and approved by the Board of Directors back in 2011. Since its formal launch in Fall of 2013, the site has been plagued with numerous shortcomings and operational issues, and the current web management contractor has made it challenging to address and resolve such issues. In order for the transition and implementation to occur in a smooth and effective manner, it is recommended that the Board of Directors act on three measures to help establish new priorities and assist in their implementation. In short, the measures are: 1.) determine general website goals and priorities; 2.) establish a website management committee; and 3.) appoint a technology director.

1. Determination of Goals and Priorities

The tasks required for APA California Website v 2.0 is expected to be extensive. The attached docs (*2011 Website Goals* and *2015 Website Objectives*) will help you to recall the original intent juxtaposed against the functionality not yet achieved. Please review both documents to establish objectives and priorities.

ACTION REQUESTED: recommend/ adopt general objectives and determine broad priorities for APA California Website v 2.0

2. Establishment of Website 2.0 Management Committee

To assist with establishing more specific goals and an implementation timeline, it is recommended that a committee or task force be convened and consist of (*a min of*) five Board Members and Staff to include the VP Public Information, VP Marketing & Member Services, the Technology Dir, the Website Manager (Francine) and at least one other.

ACTION REQUESTED: recommend working committee and appoint members to the Website 2.0 Committee

3. Appointment of a Technology Director

As we move forward, it will become essential that we have a person appointed to assist in:

a.) the establishment of criteria as well as the selection and directing of the contractor; b.) the oversight and implementation of objectives and priorities; and c.) provide continued direction for website updates and identify future technological needs. This position is already recognized in the Chapter Bylaws, but has been either never been filled or vacant for an extended period of time. Specifically, the bylaws stipulate the following:

6.17 DUTIES OF THE TECHNOLOGY DIRECTOR

The duties of the Technology Director shall be to oversee the content and updating of the APA California web site; provide direction to the Board on state-of-the-art options for the APA CA web site, oversee any contract with a website designer and work with the Vice President for Public Information to develop and update a web site work program; identify opportunities for the Board to fully utilize the web site and give the Board advice regarding other electronic options to ensure that the web site remains an up-to-date and comprehensive tool to serve members. The Technology Director shall report to the Vice President for Public Information.

As outlined above, one of APA California's contractors, Francine Farrell, currently provides these services on a daily basis. However, it seems that this was not the original intent of her contract and her contract is soon due for renewal. Undoubtedly, this service(s) will need to be outlined should the Chapter wish for Francine to continue to provide these services.

Aaron Pfannenstiel has expressed an interest in taking on the role of Technology Director and has provided a few initial objectives that conceivably will align with Chapter's goals as we navigate the website management contractor transition and implement APA California Website v2.0

ACTION REQUESTED: recommend to appoint Aaron Pfannenstiel as the Chapter's Technology Director for a term to expire 12.31.2015

ATTACHMENTS:

2011 Website Goals

2015 Website Objectives



Dec 2, 2011: Agenda Item 2B2a

APA CALIFORNIA WEBSITE UPDATE ISSUES AND PROPOSAL

DRAFT #1 12 2 11

BOARD GOALS:

- **UPDATE IT:** Update the website/platform that is now over 10 years old
- **LOWER COSTS:** Reduce existing website costs (currently minimum \$20,000 per year for InSite Logic)
- **INCLUDE SECTIONS AND CPF:** Add Section and CPF website updates to the Chapter contract
- **DO IT OURSELVES:** Switch to a “contract management web system” that is easy for the Board and staff to update and use without paying a contractor for those services
- **REFRESH TECHNOLOGY:** Require that the service provider continually refresh the platform (review on an annual basis) so new technology is available for the Chapter's use
- **MAKE IT USER FRIENDLY AND GRAPHIC:** Update the look of the website so it is clean, easy to read, and more modern with vibrant colors and photos
- **CLEAN IT UP:** Keep the home page minimal, review content of tabs for relevance, and maintain one-page home page to avoid having to scroll too far down to see the information
- **MAKE IT MEMBER FRIENDLY:** Make it easy to see and perform member login, encourage members to use the site often, and move more content to member-only access
- **MAKE E-BLASTS & CALPLANNER BLASTS ENTICING & GORGEOUS:** Update email/CalPlanner blast format with graphics and ability to scroll through pages

EXISTING WEBSITE: FEATURES THAT WORK

- Word count feature (easy to calculate price for ads)
- Auto-notification (when new job is posted)
- Online payment feature
- Automatic 30-day activation feature
- Posting option (allows clients to post their own ads)
- Article feature (easy to add feature articles)
- E-blast feature (easy to send out e-blasts)
- Auto-formatting (formats all text automatically when content pages are edited)
- Help files and demos (provided through Tendency User Home page)
- Election module (although could be made easier to use)
- Large member data capability (to accommodate 5000+ members for conference registrations and other events)

EXISTING WEBSITE: FEATURES THAT DON'T WORK

- Member Log On (difficult to find and use – members confuse log on codes)
- Public Access vs Member-Only (Member-Only restricted areas not activated for similar areas as on National APA site (www.planning.org/members/index.htm) – caused loss in CalPlanner subscriptions since anyone has access to it online)
- Registration Feature (feature for events is not used but if used for conference and Section events would reduce costs for registration as registration company would be unnecessary, and allow for a better reporting system that better matches the APA)

conference budget format; would require conference to hire someone to complete onsite registration functions however and credit card payment feature for registration now is very difficult to use)

- Invoicing through site
- Chapter-Only membership module
- User groups for e-blasts (difficult to set up user groups to use through the newsletter generator: CHC Committee, different membership types such as FAICP, AICP, students, etc.)
- Limitations on size and/or types of files that can be uploaded to site by user (have to rely on Sadna for larger files)
- Editing restrictions (some pages on the website can only be edited by Sadna)
- Awkward balance of Homepage looks messy (too much space between sections/items)
- Tabs (not easy to navigate site to get to key areas)
- Training needed to use (if user doesn't use administrative feature often)
- Formatting pages (difficult and often won't work)
- Uploading links (sometimes kicks user off the website)
- CalPlanner e-blast (has too many choices that we don't use – should be streamlined and more engaging)
- Duplication of information (some pages/links should be consolidated)
- Unnecessary information (some information/tabs on menu are not useful or need to be updated and should be pared down to core sections)
- Excess modules (some of the modules are not used such as registrations, financial, survey – we need to determine what we need, use those services and eliminate those we don't need/use)
- Editing (difficult if some browsers are used)
- Content (CMS) page (cannot restrict word count)
- Website is simply not user friendly

SCOPE OF SERVICES:

Homepage and Tab Pages:

- Menu bar at top of homepage with drop down menu tabs
- Intuitive navigation
- Streaming photos and videos
- Direct links to other features/tabs
- Clean main page with less content (avoid requiring user to scroll down too much) (boxed/block text format)
- Article function
- Simpler log in (with a member login logo so easy to find) and join APA section – and in an easy to see place on the homepage
- Make tab pages look more professional with graphics similar to homepage (now looks like a Word document)
- Clear fonts that are easy to read
- Connect to Section/National websites – make it easy for members to find Sections and National

Key Features:

- Calendar feature (easy to populate and linked to events sites)
- Chapter-Only membership module that adds new members to groups automatically so they receive info for their own local section and are placed on the CalPlanner distribution list
- Events database to support over 5000 users

- Registration module and ability to use registration results for communications, surveys, growing prospect database, tracking activities, etc.
- Press page with information for press requests
- Updated E-news/blasts/CalPlanner format with graphics (see www.Vhcle.com for format suggestion)
- Refresh every one to two years or when new technology is available
- Simplified election format
- Simplified conference and event registration open to Chapter and Sections
- Integration with social networking sites, and real time feeds

Wish List:

- Searchable database (articles, awards, etc.)
- Ability to conduct online continuing education programs
- Legislative blog/discussion forums

Cost and Maintenance:

- Low monthly fee and low initial fee
- Switch to a “contract management web system” that is easy for the Board and staff to update and use without paying a contractor for those services
- Training session for Board members at each retreat
- Check on copyright requirements – ensure webmaster knows what they are (may need permission to put up conference presentations)
- Add Section and CPF Website updates to contract
- Maintain features we like about existing website platform and fix those that don’t (see above discussions)
- Clean up and streamline content
- Add incentives on e-blasts for members to visit website often

2015 WEBSITE OBJECTIVES: Components and Functionality

WEBSITE AREA

Fully Integrated Site

SCOPE OF WORK

The website should include all pieces into one site, requiring one log in, to include:

1. General Information - to include the current site architecture.
2. Components to be included:
 - a. Member Database
 - b. Email System
 - c. Election System
 - d. Survey and Polling System
 - e. Library
 - i. Videos
 - ii. Images
 - iii. Documents

Integrated eCommerce System with Reporting

Provide an integrated eCommerce System:

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).
 - a. Ability to customize eMail messages (throughout system).
6. Laura Murphy to receive copies of the payment confirmation eMails.
7. Francine Farrell receive copies of Authorize.net payment information.
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:

- A. Job Ads
 - 1. Payment ID
 - Ability to drill down to actual job ad record
 - 2. Payment Date
 - 3. Name of Payee (not user unless the same)
 - 4. Invoice Number
 - 5. Invoice Date
 - 6. Invoice Amount
 - 7. Payment Amount
 - 8. Balance Due
 - If any, ie: mailed check not received.
 - 9. Transaction ID
- B. Chapter-Only Memberships
 - 1. Member ID
 - 2. Ability to drill down to actual member account
 - 3. Join Date
 - 4. Name of Payee (not user unless the same)
 - 5. Invoice ID
 - 6. Invoice Date
 - 7. Invoice Amount
- C. Consultants Directory
 - 1. Same as Job Ads i.1-9

eCheck Payment System

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:
- 4. Date of payment
- 5. Corresponding job ad #, chapter- only membership # or consultant directory id number.
- 6. Name of payee (from eCheck account, not user information unless they are the same)
- 7. Transaction/invoice identification number (that is also transmitted to Authorize.net)
- 8. Authorization number
 - a. Amount paid
 - b. Last four digits of account number
- 9. Refunds can be processed through eCommerce.
- 10. A report in eCommerce of sales/refunds with date(s) able to be filtered (*day/week/month or from date/to date*).