 Attachment D-1

**TO: APA California Chapter Board**

**FROM: Chapter Webinar Committee via Betsy McCullough, AICP, Vice President of Professional Development and Dave Ward, APA California Section Director Central Coast**

**DATE: APA California Chapter Board Meeting Call, June 2014**

**SUBJECT: Status Report from the Webinars Committee: Developing a Post-Conference Distance Education Series and Chapter Webinar Capability**

Recommended Action:

*Review the progress on the post-conference session component of this dual-aspect program and support the pilot program assumptions and estimated costs. Ask the Webinar Committee to continue to pursue implementation of the post-conference session at the 2014 Chapter conference rather than in 2015 as approved by the Board.*

*Continue to support Phase 2 of this effort where a limited number of live sessions produced by Sections would become Distance Education available for CM for a duration of time later than the live event*.

*Comment on listed assumptions of the Webinar Committee that are associated with both program components.*

*Pursue with APA National a simplification of requirements to register an event as a live event and then re-register it as a Distance Education event.*

Background:

Sections and the Chapter continually pursue learning opportunities for all members, particularly CM creditworthy sessions for our AICP members. Most often these opportunities are either live learning events available during the Chapter’s annual conference or are live short programs [both webinar and in-person sessions] produced by Sections for the benefit of their members. Distance Education opportunities [individual or group listening to pre-recorded sessions who are participating asynchronously from instructors] are becoming more available to Chapter members but are not being produced by the Chapter or Section CM Providers within California.

As discussed in the report to the Board [January 2014], enthusiasm developed in 2013 for a Chapter-staffed program that would allow members to view pre-recorded events: both conference sessions and Section-produced live or webinar events. Why not give more Chapter members the opportunity to have access to – and earn CM credit from – excellent sessions being produced in California venues and on topics of local interest?

The Webinar Committee has done research and conducted a series of conference calls since January. The Webinar Committee members are: Dave Ward, Central Coast Section Director; Maggie Ide, Central Coast Section Board; Bob Leiter, Chapter FAICP Coordinator; Greg Konar, San Diego Section Director; Carol Barrett, CPF Chair; Carey Fernandes, Chapter Programs Coordinator; Laura Murphy, Chapter staff; and Betsy McCullough, Chapter VP of Professional Development. While some of the criteria and expectations have held true since the direction in January, others have evolved. The following represents the most recent Committee work.

Discussion:

**Basic Program Assumptions for Either Recording Conference Sessions or Recording Live Section Events**

1. The Chapter & staff are in the best position to manage the overall program details. A major cost-effectiveness technique will be to have the Chapter, as the “annual unlimited provider”, be the “home” to pre-recorded sessions to focus the administrative responsibilities or outlays that will be required with Chapter staff [with cost recovery], allowing the Sections to focus on the content and quality control aspects of the sessions they conduct as live events and provide for later Distance Education;
2. Any pre-recorded session that is established for the use of Chapter members must be eligible for CM credit in order to draw an audience and attempt to cover costs; non-credit sessions would likely be minimally accessed by the membership, although after sessions are no longer registered for Distance Education with APA National, they could be archived on the Chapter website for learning for all members;
3. Chapter members who utilize this opportunity for CM credits will be asked to pay a nominal fee to offset costs. Generally discussed was $10/1.0 CM credit. Sessions are expected to be 1.5 hours = 1.5 CM = $15. Section Directors have supported this as a working cost;
4. A firewall limiting access to the Chapter-established Distance Education program should be set up to assure that benefits accrue to Chapter members solely;
5. At least for the pilot program, live action video is not a required component of the offerings, just a PowerPoint visual;
6. We will purposefully delay recorded session availability to avoid potential fall-off in attendance at live events;
7. Making Law and Ethics CM sessions available is a priority;
8. Developing a Chapter program should not cause us to withdraw from the Planning Webcast Consortium [generally known as the “Utah Consortium”]. Actually we have just renewed our annual membership;
9. It would be wise to start with a “pilot program” which should consist of the pre-recorded Chapter conference component; Section-produced sessions for future Distance Education should remain a priority.

**Pilot Program: Capturing Conference Sessions for CM Credit Following the Annual Chapter Conference**

The following outlines the program being pursued by the Webinar Committee for initiation in 2014:

|  |  |  |
| --- | --- | --- |
|  MAJOR PROGRAM COMPONENT | RESEARCH COMPLETED OR PENDING | ESTIMATED COST OR REVENUE BY COMPONENT |
| 1. Determine method and cost of recording up to 8 conference sessions to select 5 quality sessions for post-conference CM use
 | * Review recording opportunities: use a GoToMeetings account; possibly use conference site facilities if required to do so
 | * GoToMeeting annual account **cost is $468**
* Possible site **fee is undetermined**
 |
| 1. Determine rooms to use to record sessions in, select sessions, work with moderators to assure awareness of audio needs
 | * Prepare instructions for moderators whose sessions will be recorded
* Collect PowerPoint slides at the conference session
 | * Staff cost to prepare additional instructions is undetermined
 |
| 1. Establish a secure system to set up single events where Chapter members can find available Distance Education sessions and register for them and gain access to them – all within an area secure from non-Chapter members
 | * Chapter staff has done research and has confidence in pursuing utilization of the system “Event Brite” – a 3rd party program which is compatible with our website
* Determine how & where the PPT that accompanies the session is stored and made available to users
 | * Event Brite cost is 5-6% of each registrant’s fee. Presume 5 sessions with an estimated 100 listeners each paying $15/session is **cost of $375-$450**
* Staff costs for retrieving and storing PowerPoint presentations for recorded sessions is **undetermined**
 |
| 1. Determine registration system for listeners to use to pay fee to listen to a CM session
 | * Event Brite includes a registration system that we will be able to monitor to see who uses the program and how many use it
 | * Event Brite’s includes registration in its 5% fee identified in #3 [$375-$450]
* Staff costs for overall program management and monitoring of program use is **undetermined**
 |
| 1. Understand proper registration sequence and timing to assure the event is available for CM credit January 1 of the calendar year following the conference [i.e., January 1 2015 for the 2014 Conference recordings]
 | * Investigate the timing of APA National’s review and approval of each session as a Distance Education event.
* Outline time required by Chapter staff to prepare and register and monitor recorded sessions for post-conference use.
 | * Staff costs to register each session with National is **undetermined**
* Registration with National APA for Distance Education is a lower cost for the Chapter due to our annual unlimited provider status. For 5 sessions the cost is $50 per product or a **cost of $250**.
 |
| 1. Determine whether Sections would also want copies of sessions as CDs to use as a lending library or as a focus for group discussion
 | * Some Sections have indicated a desire to use these sessions as group learning experiences.
 | * If Sections desire to have CD copies of sessions, staff time and CD cost to help Sections create the equivalent of a lending library could be **$500**
 |
| **PILOT PROGRAM ACTUAL TOTALS:*** **EXPENSES COULD BE $1593-$1668 PLUS STAFF COSTS FOR 1 YEAR\***
* **REVENUES COULD BE $7500 IF 100 LISTENERS REGISTER FOR EACH OF 5 OFFERED SESSIONS THAT WILL REMAINAVAILABLE 1 YR**
 |

\*A portion of the expenses could be reduced if there are more sessions offered beyond 5 from the conference

**Phase 2: Live Section Activities Recorded and Available Online for CM Credit**

The Webinar pilot phase encompasses only the availability of pre-recorded conference sessions. However, the Webinar Committee also researched technical options for conducting live webinars and recording those Section-produced sessions for later use as Distance Education.

The capturing of live session activities for future Distance Education can be approached one of two ways:

* Live session; **no remote attendees to live session**; session captured and downloaded with coordinated PowerPoint for future Distance Education; or
* Live session; **remote attendees are able to join live session**; session captured and downloaded with coordinated PowerPoint for future Distance Education.

These two approaches have different levels of technical system requirements during the live session due to presence or absence of remote attendees. Some Sections may want or need to have live remote attendees due to their geographic dispersion: however, it may be that this type of session is reserved for a Section-only event and not for Chapter-wide use. Thus, a Section-Session-Sharing program component may not be sharing of local webinars but instead only sharing of recordings of live sessions.

During Phase 2 the capturing of Section events for recorded listening and CM credit will be discussed in more detail with Section Directors and those who develop the Sections’ programs on a number of issues:

1. Determine the willingness of Sections to produce sessions and make them available to other Sections;
2. Determine how to encourage the use of available Distance Education sessions by Chapter members;
3. Determine whether Sections prefer to record live-only sessions or commit to the more-complex remote-listener sessions which have higher recording systems cost;
4. Research with APA National staff the ability to concurrently register a single live event for both live event CM credit as well as Distance Education credit. There are requirements upon submittal for CM credit that are additionally required for Distance Education sessions that would have to be submitted. Unnecessary expense and uncertainty over sessions to be offered may make the concurrent submittal of annual conference sessions as Distance Education sessions over-complicated although a concurrent approach will be investigated for 2015. It does make sense to pursue concurrent submittal for Section-produced live or webinar events as Phase 2 is developed;
5. Revenue and costs must be more fully discussed for Phase 2. The revenue generated by recorded live sessions available as Distance Education could reasonably be estimated similarly to the pre-conference session use: 5 sessions at 1.5CM accessed 100 times each at $10/CM would generated $7500 gross;
6. How will revenue after cost be distributed or reinvested in the program.

Costs are displayed by program component for the Pilot Program and would be similar in Phase 2 regarding CM registration and staff costs:

**GoToMeeting - $468 or GoToWebinar - $968**

**Annual registration costs for CM credit - $250**

**Event Brite for registration of listeners @ 100 for 5 sessions @ $15 – 5-6% or $375-$450**

**Staff Costs – undetermined**

**TOTAL COST - $1600-$2000 plus Staff costs**

The presumption for Phase 2 is that Chapter costs [both staff and systems outlay] must be recovered before revenue returns to the Section producing the event. While revenue could be expected to ~$7500, the more a Distance Education session is promoted by the Section producing it, the more listeners the session will have resulting in more revenue to allocate.

Assumptions specific to the live-sessions aspect of this program component were:

* Session is delivered live with audio + video desktop sharing for PowerPoint. No camera required;
* Preference for integrated audio rather than use of separate conference line for audio;
* Session will be recorded for later upload to storage or streaming site;
* No more than 10 webinars per year;
* Maximum of 100 remote attendees during live webinar if that aspect is included.

Besides GoToWebinar, the technical subcommittee of the Webinar Committee researched several systems which appear to provide the best match of features to anticipated Chapter criteria. See Attachment 1 for the systems that the Webinar Committee evaluated.

**Other Options Explored for Phase 2**

Since this is Phase 2 of the project, a final recommended approach has not been prepared. Still being researched is an option to work with the well-respected University of California Davis Extension Program to utilize their equipment system for our Section-produced webinar sessions to our mutual benefit.

An originally-anticipated option that is not being pursued is utilizing the Webinar Consortium system as the Chapter’s sole vehicle for providing either live webinars or recorded sessions. The Consortium’s focus at this time appears to be the management of live webinars. They are offered to members of Chapter that belong to the Consortium at no cost and CM credit is available for most of their webinars. The Consortium only maintains two recorded sessions for CM credit: one Law and one Ethics. Other recorded sessions [past live webinars] are available on the Consortium’s YouTube channel, however, CM credit is not available for these because they are not registered with APA as Distance Education due to cost.

While the Consortium does not provide an appropriate system for the California Chapter to utilize for our Webinars and pre-recorded sessions, membership in it is of value to our members as free webinars for general professional development and an available Law CM session and Ethics CM session for our AICP members.

**SUMMARY**

The Webinar Committee recommends proceeding with a plan to enact the Conference Session recordings in 2014 as a first phase pilot project. Continuing to Phase 2, engaging Sections to produce sessions for future Distance Education is a discussion that is progressing at the Section Directors level.

See attached chart for a summary of major program components. See Attachment 2.

**ATTACHMENT 1**

 **MOST VIABLE RECORDING SYSTEMS ANALYZED BY WEBINAR COMMITTEE**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Supported Features** | **Citrix GoToTraining** | **Cisco WebEx** | **Click Webinar** | **Mega Meeting** |
| Live Webinar | X | X | X | X |
| Recording | X | X | X | X |
| Registration | X | X | X | X |
| Payment | X |  |  | X |
| Evaluation/Reporting | X | X | X | X |
| Polling During Session | X | X | X | X |
| No. Attendees | 200 | 100 | 100 | 250 |
| Cost of Service | * $279 per month/200 attendees w/annual plan. Includes free GoToMeeting account, valued at $39/mo.)
* Consultant support extra.
 | * $89/per host/per month
* $60/month on annual plan.
* Additional costs for larger number of attendees.
 | * $59.25/month/100 attendees w/ annual plan
* $120/month/1,000 attendees w/annual plan
* 40% lifetime discount for non-profits
 | No response to request but secondary sources state $129/month/100 attendees w/video. Must add ‘Business Bundle’ for one time charge of $995 to access registration, payment, polling and desk sharing capabilities. |
| Pros | Citrix is known for ease of use and packaging tiers of services to focus on usability and no frills.  | Easy to use. Good set of tools for presenters and attendees. Allows attendees to interact with each other. Support for mobile apps. | Allows use of any browser to connect to webinar. Multiple access options: free for all, password protected, token protected. No software installation required. 30 day free trial.  | No downloads required to use. VoIP or conference line or audio. Ease of use. |
| Cons |  |  | No attendee payment option. |  |

**ATTACHMENT 2**

**OPTIONS FOR WEBINAR PROJECT DISTANCE EDUCATION APPROACH**

|  |  |  |
| --- | --- | --- |
| Program Task | Recording Annual Conference Sessions | Recording Local Sessions |
|  |  | In-person Attendance Only | In-Person & Remote Attendance |
| Selecting Sessions | Determine prior to conference; Chapter & CHC determines appropriate sessions; arrangements made to record at conference | Identified by Section and recording made available to Chapter for registration as Distance Education | Identified by Section and made available to Section members remotely [and maybe Chapter members] remotely; make available to Chapter for registration as Distance Education |
| Live Presentation | Regular conference session | Section advertises for live session | Section advertises for live event and for opportunity [Chapter-wide?] to participate through webinar capability |
| Attendees Present | Yes | Yes | Yes |
| Attendees Remote | No  | No | Yes  |
| e# Registration | Part of conference multi-part ‘live’ event | Registered as single ‘live’ event by Section | Registered as single ‘live’ event by Section [any other detail because of remote attendees?] |
| Payment for Live Event | Part of conference registration | Part of Event Brite – proposed to be handled by Chapter staff | Part of Event Brite – proposed to be handled by Chapter staff |
| Session Being Recorded? | Selected sessions will be recorded | Section will have identified this session for sharing & will record it on Chapter GoToMeeting [eg] account on system that does not accommodate remote attendees | Section will have identified this session for sharing & will record it on Chapter GoToWebinar [eg] account on system that accommodates remote attendees for the live event |
| Distance Education Registration with APA National for CM credit | Selected sessions will be resubmitted as Distance Education | Session will be recorded to be resubmitted as Distance Education.  | Session will be recorded to be resubmitted as Distance Education.  |
| Chapter Registration of Distance Education | Register through Chapter – perhaps website Calendar of Events | Register through Chapter - perhaps website Calendar of Events | Register through Chapter – perhaps website Calendar of Events |
| Payment for Accessing Distance Education | Event Brite has payment component built in; payment goes to Chapter | Event Brite has payment component built in; revenue could return to Section minus expenses by Chapter | Event Brite has payment component built in; revenue could return to Section minus expenses by Chapter |
| CM credit | Through My CM Log | Through My CM Log | Through My CM Log |

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