American Planning Association
California Chapter

Making Great Communities Happen

06 OCTOBER 2018

FR: Marc Yeber, VP Public Information

TO: APA California Board of Directors

RE: Website Migration Update

As most of you are aware, the Chapter was scheduled to begin the process of migrating to the Chapter/ Division portal of the APA National website starting this past August. However, a number of migrating obstacles and a lack of digital capabilities has become evident that has given us reason to reassess making such a move at this time. Below is brief overview of some of the challenges that have been identified.

- **Functionality:** *It has been recently discovered that the capabilities currently employed by the APA California website are a bit more sophisticated than that of the APA National site. This would not account for some of the future capabilities the Chapter seeks for the next website iteration nor the functionality National plans to implement at some point in the future. Some existing examples include job ad submissions, consultant directory and conf. registration to name a few. Job Ads, for instance, is much a more complex process via the Chapter site than currently utilized by National. There were 346 ads posted via the Chapter website in 2017 and we are on pace to exceed that this year. It is fully automated with Laura Murphy's (contract staff) intervention needed in less than 3% of the time. The Ads are calculated on a per word basis, and based on a 30 day posting. National's process is not fully automated and has four categories that have nothing to do with word count. Currently, Job Ads account for the 2nd most revenue for the Chapter.*

- **Integration:** *Though I am not involved with the Conference planning, I understand that this year's Registration process took a significant step backwards in terms of integration and automation due to the use of the National's Conf Registration portal. For your knowledge, we are suppose to integrate or embed this function with the next iteration of our website. In addition, the 2015 Website Scope doc (**attached**) outlines other integration objectives such as an internal search engine, events calendars, news feed, eCommerce, etc. not to mention all the back-end functionality and reporting.*

- **Migration:** *At the beginning of the process, we were told that National's website management team would take the lead in migrating content. However, due to the size and shear volume of our content, National is now indicating something different. We are now expected to take the lead using staff and Chapter volunteers and hence why I suggested in prior recent discussion hiring a CMS Contractor to assist. However this presents cost challenges as well as manpower needed to port all content over. But even before we would consider this, we would need to be trained on National's content management system(CMS) platform.*

In a few recent exchanges with National staff who is overseeing the launch and implementation of the portal, it came to light that that National was just learning of some of the challenges of providing our members with the same level of service and without significant additional labor costs incurred by the

Chapter. It also became apparent that National *(including their website contractors)* had not fully considered our long-term objectives that were outline in the aforementioned Chapter website document (*which had been shared as part of the launch process more than a year ago*). In fact, an admission of not carefully reviewing and analyzing the Chapter website document -- and subsequently, not adequately understanding the Chapter's needs -- was made by National staff.

That said, it would seem to be premature at this time to <u>fully</u> migrate to the Chapter/ Division portal until we better understand the functional discrepancies (*current and future*) as well as the potential fiscal impact. We are currently working with the National team to better assess the Chapter's needs as they relate to the portal's current capabilities so that an appropriate solution can be crafted. Some of the initial suggestions currently being considered and analyzed are as follows:

1. **NO MIGRATION: *Continue with the Current Site*** (*making some design/ layout modifications to be more in line with the look of the portal*) and utilize existing link until all Chapters and Divisions are fully migrated. At that point we would reassess the portal's capabilities to determine if such a migration is feasible or practical.

2. **MINOR MIGRATION: *Create Landing Page Only*** at the portal, but link to current site for other website pages and functionality needs. In this scenario, we would mimic the design/layout so that the user is not aware of the redirection of the browser.

3. **PARTIAL MIGRATION: *Migrate Informational Content Only***, but leave the necessary functionality in the hands of the Chapter. As in the previous suggestion, we would mimic the design/ layout to make it appear seamless during the user experience.

4. **FULL MIGRATION: *Migrate as Planned*** augmenting site with 3rd party technology to allow the Chapter to use the technology currently employed.

Each of these would require considerable evaluation and analysis before the Board can make an informed determination on the best course of action for our website. Therefore ***NO Board action on this matter is required at this time***. Instead, it is encouraged that the Board engage in a brief Q&A / discussion period (*time permitting*) in order to consider a recalibration of our website migration strategy.   A report evaluating the above strategies and proposed recommendations that reflect the Board's priorities and goals will be prepared and presented during the January Board Meeting.

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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.

OBJECTIVES	SCOPE OF WORK

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.

OBJECTIVES	SCOPE OF WORK

     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.

OBJECTIVES	SCOPE OF WORK

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