American Planning Association
California Chapter
Making Great Communities Happen

DATE: January 25, 2020 REVISED

TO: APA California Chapter Board

FROM: Hanson Hom, AICP, Vice President Conferences

SUBJECT: Conference Registration and Website

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RECOMMENDATION

1. Authorize entering into a five-year contract with Cvent for conference only services to develop and support a conference registration program, website, and enhanced mobile app at a cost of $21,937 annually, with an additional one-time expense of $5,000 to build these features. The annual cost would be borne by the conferences whereas the one-time expense would be spread among the next eight conferences.
2. Authorize entering into a five-year contract with Cvent for their "OnArrival 360" onsite registration and badge printing package for a cost not to exceed $15,905 annually.
3. Authorize entering into a contract with Digital Gear for a one-time expense of $3,432 to improve our API integration with the APA California membership base for conference and event registration.
4. Pursue reduction of duplicative conference expenses to offset the above contracts.

BACKGROUND

For the past three conferences, we have engaged with different vendors to manage our conference registration, website, and mobile app. In 2017, we used Cvent for registration, Vieth Consulting for the conference website hosting, and Certain for the mobile app. In 2018, we switched from Cvent to APA national for conference registration, and in 2019 we switched again to Vieth for registration. We have used the same but different vendors for our conference website (Vieth) and mobile app (Certain) for all three conferences.

The results have yielded mixed reviews and have been a learning experience. We found that although APA offered a very enticing introductory offer to provide our conference registration, we unfortunately found that their program, which they offer to all APA Chapters, is less robust than the program they use for the national conferences and cannot handle our more demanding registration requirements. With the desire to integrate our various technology tools, we then contracted with Vieth to develop our registration and also designed a more robust conference website to replace our printed program. Eliminating the printing of the

conference program was a move towards greener practices and eliminated about a $10,000 expense. Vieth was very reasonable cost-wise, but their service is a "do-it-yourself" (DIY) approach, which proved inefficient and time-consuming to set up. Considerable credit deservedly goes to Francine for assuming more work than expected to get to the finish products, but the process and outcome were less than optimal.

Event management software has advanced considerably in the recent years, and with our conferences growing in attendance as well as complexity, we need to step back and reassess the technology tools we are currently using and explore what the marketplace currently offers to support our event management needs. This has been identified as a priority goal by the Conference Planning Ad Hoc Committee. I, along with Francine Farrell, who oversees our registration, website and mobile app, and Deene Alongi, Conference Manager, have spent the last several months after the 2019 conference to critically examine our processes, to identify areas for improvement, and explore possible third-party solutions. I also reviewed past user complaints and suggestions offered by attendees in our post-conference surveys. Finally, I inquired into technology tools used by other organizations that hold conferences comparable to ours. The conclusion is that we need to rethink how we have been doing things, which in some cases have been in place for many years. While our practices get the job done, they do not take advantage of technology capabilities that are current available to work smarter.

DISCUSSION

Goal and Objectives

The overarching goal should be to not only streamline our internal or "behind-the-scenes" processes, but to enhance and expand the tangible services we offer to conference attendees, speakers, and sponsors. After investigating various vendors and looking at how other conferences are using technology, we arrived at the following conclusions and objectives:

1. We are not using the available event management tools for optimal efficiency in conference planning and should "reimagine" the application of technology to improve conference administration, registration, and communication with attendees.

2. Using independent software for registration, website, session selection, exhibitor services, and the mobile app is highly inefficient and duplicative especially when better integrated solutions are now available from event management companies.

3. Our conferences have become larger and more complex and our conference income situation allows an opportunity to explore more robust technology solutions to enhance our services for attendees and to reduce or replace time-consuming manual processes.

4. We have experienced ongoing problems with conference registration related to downloading and transferring current APA membership information (referred to as "API interface") that warrants exploring a better solution.

Summary of Integrated Registration, Website and Mobile App Proposals

After conferring with various firms that demonstrated their product and services, we concluded that two firms offered the most suitable integrated solution to meet our conference needs: **Cvent** and **Certain**. Cvent is considerably larger and is well-recognized in the industry. However, both firms are leaders in the event management field and are established businesses that have been operating for about 20 years. An added plus is that they are both familiar with our conferences through their provision of either registration or mobile app services. We also explored other well-regarded firms (e.g. Evite, Constant Contact, RegPack, Events Local), but they are either more suitable for simpler single-day events or cannot accommodate API integration without considerable customization.

After deciding to focus on Cvent and Certain, we discussed various options with each company to meet our conference needs. The attached Table 1 provides a summary of their proposals. Both firms have offered a discounted price to attract our business. The quotes range from an annual cost of $30,192 to $39,187, which reflects costs savings related to eliminating or reducing existing conferences services, such as the current website hosting service by Vieth Consulting. It may be possible to further reduce conference expenses, and this will be explored after the Board's decision.

Table 1 differentiates between annual costs and a one-time fee for design services to build our registration and website. For the mobile app, we have a remaining one-year contract with Certain (so no build fee needed), while Cvent has offered us an enhanced mobile app with waiver of their one-time build fee. For example, an enhanced feature will allow session moderators to poll or interact with the audience through their smart phones.

Conference Only or Multi-Event Package

Cvent has provided two options: one for our conference only for up to 1,500 registrants ($4.87 per registrant above this number), and the second for our conference and unlimited events for up to 5,000 total registrants. Certain felt their most competitive approach was a multi-event proposal for up to 5,000 total registrants. A multi-event option is a cost-effective solution and offers economies of scale. The capability to register for multiple events can be attractive if the Chapter plans to expand registered workshops and events, and Sections can also tap into this capability. But the Board should consider if the extra expense for this expanded service will be used fully and can offer benefits beyond simple and economical registration vendors such as Evite. If not, it would be preferable to go with Cvent's lower-cost conference only option. The multi-event option could be added in the future when appropriate, although the price for this later adjustment may not be as favorable.

Benefits of Integrated Technology Solution

While an integrated solution is intuitively logical, it is beneficial to highlight tangible examples of how this approach can significantly improve our conference planning procedures, streamline staff work, and provide better service for attendees. Examples include:

- Conference registration can be better understood through the analytics and standard or custom reports that are available through event management software.

- With the integration of registration and the mobile app, attendees can easily access their registration profile by logging into the mobile app.
- Conference program information can be populated simultaneously on all three platforms: registration, website and mobile app. This avoids redundant work to load this information separately onto each platform, which requires duplicative work when a change affects the same information posted on all three platforms.
- Current registration software provides more effective ways to communicate to all or a sub-set of conference attendees based on differentiated or filtered registration data.
- Tools are available to improve services, marketing and communication with our sponsors and exhibitors; exhibitors can also be provided with the ability to easily collect information from attendees that visit their booth.
- All session organizers can be provided access to directly edit their session descriptions, speakers, and other information without staff having to do this laborious work.
- We can imprint bar codes on badges or scan cell phones to screen entry into paid events such as the opening reception and mobile workshops. This eliminates the need for printed tickets.
- With sufficient volunteers, we can scan attendance at conference sessions to determine the popular topics.
- Eventually, we can integrate the session submittal and selection process into the integrated platform; currently we use a stand-alone program but it is not feasible to integrate until the 2021 conference.

On-Site Registration/Badge Printing

Conferences are increasingly using check-in kiosks to expedite the printing of conference badges and onsite registration. These self-help stations allow pre-registered attendees to enter a personal identification code into an iPad or similar device, and print their badge and other items immediately. An attendee can also make changes or corrections if needed before the badge is printed.

Check-in kiosks with printers avoid the need to pre-print and mail badges, which inevitably results in some attendees not receiving them in the mail (or mailed to a different address) or forgetting to bring them to the conference. Picking up pre-printed badges onsite can create long lines and it takes time to make changes or correct errors in an attendee's registration and print a new badge. Attendees would be able to do this at the check-in kiosks. It also requires a fair amount of staff time to print and collate badges in advance, especially since our conferences have grown considerably in attendance. Additionally, "walk-in" or onsite registration can be expedited with self-help kiosks.

The cost for setting up the check-in kiosks (branded "OnArrival 360" by Cvent) is about $17,000. This price includes eight iPad stations and one onsite technical support person during the entire

conference. While this cost might appear high, it would be offset by reducing related conference expenses, such as pre-printing/sorting badges before the conference and onsite staff support at conference registration (from four to three contract staff). Conference organizers highly praise the check-in kiosks. While this is an optional feature, the VP of Conferences believes that it can improve the efficiency of onsite registration and the overall conference experience for attendees.

Evaluation of Both Proposals

In evaluating both proposals, we concluded that both companies and their proposals are sound and competitive. Price is comparable and can be absorbed by the conferences and still achieve our profit goals. The estimated net cost of $29,000 (includes reduction of other expenses) is currently reflected in the proposed 2020 conference budget. It is recommended that we spread the one-time $5,000 "build" cost across multiple conferences. Once the systems are built, this does not have to be repeated each year, although incremental improvements or upgrades may be desirable periodically. If we choose either Cvent's or Certain's multi-event option, some of the expense (about $9,000) should be assumed by the Chapter rather than the conference.

Perhaps the main distinguishing feature of both proposals is that Cvent's proposal is an all-inclusive cost; their firm would take full responsibility for the software, build services, attendee support services ($21,937 for conference only), and the optional "OnArrival 360" solution ($15,905). It should be noted that their proposal is discounted for a five-year term. We can enter into a shorter three-year term for an approximately 15% percent higher cost.

Certain's proposal is essentially $34,150 for the first year, which includes our current second year contract of $5,000 for the mobile app, and then it drops to $29,150 for subsequent years (not including onsite registration). They have not committed to a multi-year price, but the cost of their mobile app has remained constant. The primary concern is that Certain would provide their product and technical support, but we would have to enter into a separate contract with AMi for attendee support services and the onsite registration kiosks. We also do not have a firm price for the onsite registration option, but expect it would be similar to Cvent. While AMi is experienced, specializes in event management, and is familiar with the Certain product, the division of contract responsibilities introduces uncertainties in administration and implementation, and one of our objectives is to consolidate our services and contracts. Certain's proposal is also for multi-events only.

Given that Cvent's proposal is a consolidated service and is comparable to the proposal from Certain, the VP of Conferences recommends entering into a contract with Cvent for the conference only. The Board could also consider the additional cost for a multi-event contract. Cvent is a national leader in event planning technology and customer service and have extensive experience supporting complex conferences and events. They also have a local office in San Francisco.

Improved API Integration

Separate from our discussions with Cvent and Certain, we approached Digital Gear, our existing API vendor, about improving our API integration or interface with the APA California

membership list. They have quoted a one-time fee of $3,432 for this improvement which is very reasonable; incremental minor expenses that may be needed later. The regular transferring and updating of membership information to our registration program will be automated, which should reduce problems encountered by some members when registering for our conference. Corrections are currently performed manually by staff which is time-demanding and inefficient. This upgrade will also allow us to immediately add new APA and Chapter Only members into the registration database to avoid delays. Of course, if an existing member has not contacted APA national to update their membership information, this technology enhancement will not solve that problem. But it should remedy many other membership and registration issues and is well worth the one-time investment. Because this enhancement is a one-time cost and provides benefits to the Chapter beyond the conference, I recommend that this cost be absorbed by the Chapter.

Attachment:

1. Comparison of Registration/Website/Mobile App Proposals

ATTACHMENT 1
Comparison of Registration/Website/Mobile App Proposals
(Revised 1/23/2020)

Contract Services	Cvent (5-year contract)		Certain/Ami (2-year contract)
	Conference Only	Multi-Event Registration	Multi-Event Registration
Number of Registrations Annually	Up to 1,500	Up to 5,000	Up to 5,000
Annual licensing and hosting fee, and API support for integrated technology solution (registration, website, mobile app, and exhibitor management)	$17,437 Cvent	$26,432 Cvent	$25,000 Certain
Annual attendee support services	$4,500 (12 months) Cvent	$4,500 (12 months) Cvent	$4,150 + phone (6 months) AMi
Sub-Total Annual Cost	$21,937	$30,932	$29,150
OPTIONAL ON-SITE SERVICES: (annual cost)	Provided by Cvent:	Provided by Cvent:	Provided by separate contract with AMI:
1) On-site registration (8 check-in kiosks, 4 printers, 10 bar scanners, software, equipment, badges, other supplies)	$11,305	$11,305	$11,305 (est.)*
2) On-site staff support	$4,600	$4,600	$5,000 (est.)*
LESS EXISTING CONFERENCE COSTS: 1) Website/registration hosting and support services (Vieth Consulting)	$5,000	$5,000	$5,000
2) One less on-site staff	$4,000	$4,000	$4,000
3) Other possible costs	TBD	TBD	TBD
TOTAL ANNUAL COST (not including one-time costs)	$28,842	$37,837	$36,455
ONE-TIME fee for event build services and staff training (templates for registration and website)	$5,000 Cvent	$5,000 Cvent	$5,000 Certain
ONE-TIME fee for improved API membership integration for conference/event registration	$3,432 Digital Gear	$3,432 Digital Gear	$3,432 Digital Gear
ONE-YEAR remaining term on Certain mobile app contract	$5,000	$5,000	$5,000

*Needs further discussion with AMi