



American Planning Association
California Chapter

Creating Great Communities

DATE: October 8, 2020

TO: APA California Board

FROM: Ashley Atkinson, President Elect
Ellie Fiore, Vice President for Communications
Derek Wong, Vice President for Administration

SUBJECT: Chapter Administrative & Communication Tools

In spring/summer 2020, we initiated a dialogue with Chapter Board members, Section Directors, and selected staff to survey the systems and software currently used to support the Board's administrative and communication activities, along with those in use by the sections. We identified areas in which additional support technology is needed, prioritized these needs, and researched the tools available to meet them. The results of this exercise are available in the attached spreadsheet, and the needs identified as high priority are:

- @apacalifornia.org email addresses to facilitate consistent and professional communication between Board members, staff, members, and external audiences
- An email group function to allow all members to be emailed using one address (i.e. Board, Executive Board, Conference Committee, PDOs)
- A shared calendar to facilitate scheduling and visibility of meetings, deadlines, distance learning opportunities, and events
- A shared file system to allow Board members and staff to more easily locate reference files and collaborate on documents, with consistency from year to year

Addressing these basic needs would support Board members and staff with improved communication and organization, and in doing so, facilitate better service to our members. They are best met by two “software as a service” providers that offer their applications to customers online: Google’s G Suite and Microsoft 365. Both offer their products on a subscription basis per individual, with free subscriptions for eligible non-profit organizations. Both products include the following online features:

- Email accounts

- Calendar
- File Sharing/Storage
- Word Processing
- Collaboration/Groups
- Video Meeting
- Spreadsheets
- Presentations

For a detailed comparison of the two services, see the spreadsheet attached.

In order to begin implementation, we recommend that the Board approve piloting use of G Suite to meet our high-priority needs in the remainder of calendar year 2020, for full launch in January 2021. G Suite is recommended as an industry leader in online services, because it allows for monthly rather than annual subscriptions, and because it is the service most in use by the sections. Verification of our eligibility for the non-profit discount is in progress.

If the Board approves this recommendation and we are eligible for the non-profit discount, we would proceed with account setup and testing. After the working group (consisting of President Elect, VP for Administration, VP for Communication, and any other interested Board members) and staff are successfully oriented to these services, we would establish protocols and best practices for their use, and work toward rolling them out to the full Board in January 2021. Additionally, we will evaluate whether additional services or software are recommended to meet other medium- or low-priority needs and bring them to the Board for consideration at the January meeting.