TO: APA California Board of Directors

FROM: Ben Morrison, Distance Education Project Manager

DATE: 1/11/2021

SUBJECT: Chapter Association Management System and Learning Management System

**Background**

The Chapter has hosted or co-hosted over 40 virtual events over the past year, and an opportunity was identified to better serve members through a Learning Management System (LMS). Generally speaking, a LMS would allow the chapter to organize educational content, create ‘learning paths’, sell recordings, and, if relevant, manage CE credits and certifications.

Many associations combine their LMS with an Association Management System (AMS). Combining an AMS and a LMS would provide a number of benefits, notably “member” and “non-member” tiers for selling educational content, data on which members are engaging with content the most, streamlined event registration, and more. Besides these features, a good AMS would streamline accounting, handle member email communication, automate dues renewal, and allow the chapter to easily reach out and re-engage ex-members, ex-student members, or other target populations with data segmenting.

One of the Chapter’s strategic plan goals is to:

“Build our membership strategically by targeting groups that can increase our long-term sustainability and effectiveness as an organization, such as students, academics, young planners, and mid-career planners by provide meaningful membership services and engagement opportunities that give value to membership at all levels of our members’ careers into retirement.”

We are also striving to increase diversity and build relationships with affiliate organizations. An AMS system would help with all of these goals as well as assist APA and its sections in outreach, marketing, and communications.

Another benefit of having a consolidated AMS that the chapter and sections could both information share, have more consistent branding and reduce the number of other services the chapter and sections currently contract for.

The Chapter also needs to upgrade its website. Many of these services include a website.

**Options**

Four different software are currently under consideration: MemberClicks, MightyNetworks, aMember (the current AMS), and Wild Apricot. See the attached document ([APA California AMS.xlsx](https://docs.google.com/spreadsheets/d/1z9d5Srp5ecZPjhz0Gs30iIvRcVyolVP0/edit%2523gid=1663464280)) for a high level breakdown of the features and pricing of each.

Generally speaking, MemberClicks is a user-friendly AMS/LMS that would handle all of the chapter’s needs, and would start building a valuable, unified, database of educational content and member information. It would cost around $14,000-$17,000 per year, with a one time set up fee of ~$2,000.

The MemberClicks price also includes a website, which from online reviews is easy enough to set up and manage. We would have to transfer the content and design from the old website to the new CMS. Online reviews also indicate they have a great customer service help desk that is readily available.

MightyNetworks has great community building features and would function as a supercharged LMS. It could host educational content, but is also essentially like having your own private Facebook just for your members. This includes a dynamic newsfeed, polls, questions, and direct messaging between members.

However, MightyNetworks does not have robust enough AMS features to handle all of the chapters’ needs. MightyNetworks would cost ~$1,000 per year.

aMember is the current AMS that the chapter is using, provided via DigitalGear. aMember has all the features we need for a basic AMS, but is the least user friendly of the options we are considering. It currently costs the chapter $1,920 per year, paid to DigitalGear. The software itself is $140 for a lifetime license. We also pay for any updates and for staff to use this system. While aMembe has many of the same features as the other systems, we are not currently using them. It is unclear if this is because we do not have staff capacity or some other reason.

Wild Apricot is a highly rated and well reviewed enterprise AMS that also includes events. Wild Apricot generally specializes in working with non-profits. It would not quite be a full LMS, but we could do event registration with member and non member pricing through Wild Apricot. They also have a website solution with free website hosting, or a Wordpress integration. Wild Apricot would cost $4,200 per year for up to 15,000 members.

The Wild Apricot website (optional) includes a drag-and-drop website builder with calendar plugins, forum features, and is included in the $4,200 per year price. The Chapter would have to design the new website, or pay for someone to copy the old formatting from the current website, and migrate content. Currently the Chapter pays $400/month to DigitalGear, or $4,800 (reduced from $652/month after a meeting with Chris from Digital Gear in November 2020).

**Next Steps / Timeline**

Before moving forward, it will be important to answer a few big questions. In no particular order, it would be important to address:

* What are the chapter’s priorities with regards to an AMS/LMS?
* How would we like to use this to better serve our members?
* How important is ease of use for chapter administrators as well as end users?
* Does it make sense to stick with DigitalGear, or start fresh?
* What are the budgetary limitations?

We should have a clear sense of how the system should function before moving on to demos and implementation discussions.

These big questions should be handled by a committee tasked with reviewing the AMS/LMS options, and once we have alignment, we should set up demos or free trials with the individual software under consideration.

Depending on committee availability, it seems reasonable to have initial planning meetings in February, demos and implementation discussions in March, and present a recommendation to the executive board by the end of April 2021.