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**AFP Chapter Leader Survey: Database and Website Overview  
Key Requirements**

**Background**

AFP Global has initiated a critical project to develop a brand-new Salesforce-based database platform solution with partner Nimble AMS to replace its current Personify database. Project completion is targeted for late 2022, with the official platform launch starting in January 2023.

Most critical to the success of this endeavor will be database and website solutions AFP Global is able to provide to AFP chapters: Data collection and access, reporting, community tools, new websites, and the like. Providing an integrated solution will allow AFP Global and the chapters to begin to achieve a 360-degree view of all member demographics and activity, and start to provide a more personalized, targeted experience across the membership.

**Methodology**

To ensure AFP Global has a clear understanding of chapter expectations and needs, a comprehensive survey was developed as part of the project requirements and discovery process. The survey consisted of a total of 33 substantial questions, divided into four sections (Current Chapter-Level Member Data Maintenance; AFP Global Database Information and Reporting; Current Chapter Website/Communications Process; New Database/Reporting/Website Platform Requirements)

The *AFP Chapter Leader Survey: Database and Website Overview* was sent to all identified AFP chapter leaders on November 29, 2021 (and a reminder sent two weeks later), asking each chapter to identify the appropriate or most knowledgeable person in the chapter to complete and submit this survey on behalf of the chapter.

The survey closed on December 18, 2021, with 107 of AFP ‘s 198 professional chapters (54%) submitting responses.

To see the full survey results, visit: <https://www.surveymonkey.com/results/SM-KXDMRDXC9/>.

**Project Expectations and Requirements**

Based on the responses and feedback provided by the chapters through the survey, AFP Global has identified the following project expectations and requirements for the new chapter platform solution:

***Chapter Platform Solution “Must-Have” Requirements***The follow items have been identified as core “essential” requirements to ensure the successful adoption and use of any chapter platform solution.  
  
NOTES:

* Items and functionalities marked with an asterisk (\*) have been requested and would also greatly enhance the adoption and use of any chapter platform solution, but are understood by AFP as “blue-sky” items and thus potentially not possible for the initial platform launch (or at all), whether due to technical complexity, non-existent functionality (at this time), and/or resource/cost.
* Items and functionalities marked with a carrot (**^**) can be considered “nice-to-haves” - functionalities the chapters have expressed a need for or interest in having, but fall outside core “essential” status. These still might be possible to include as integral functionalities in the new platform solution or may be available as possible “add-ons” the chapter can separately contact for/purchase from Nimble. A determination of their feasibility and status will be made as project requirements are worked through and finalized.

**Any chapter platform solution must contain the following:**

* **Email marketing automation tools tied to Nimble database.***This Includes:*
  + Ability to pull a list of chapter member emails or a subset of chapter member emails based on demographics, membership status, events attended, etc.
  + Ability to pull lists of non-member accounts who have attended a chapter’s events to cultivate them to become members
  + Create and send email blasts (newsletter, etc.) to pulled lists
  + Email analytics (tracking open rates, opens, actions on email)
  + **^**Ability to create a chapter email sign-up form for members and/or non-members to submit email to receive chapter newsletter/communications
  + Event email communication requirements (see below under “Events”)
* **Robust dashboards and reporting.**  
  *This includes:*
  + Ability for chapter admins to see real-time graphic dashboard overview/snapshot from Nimble of their current membership numbers, demographics, trends month to month, over past year, etc.
  + Ability for chapter admins to tailor and modify (to an extent) this dashboard overview/snapshot from Nimble of their current membership numbers and demographics
  + Ability for chapter admins to quickly run and download set saved reports on their membership with minimal effort (new, growth/retention, lapsed, about to lapse, roster, demographics, chapter dues reimbursement, anniversary dates/years a member, etc.) by date range
  + Ability for designated chapter chair/admin to run chapter’s BE the CAUSE Chapter Tally Donation Reports
  + Ability to preview these set saved reports before running
  + \*Ability to automate the running of these set saved reports and have them emailed to chapter admins, or for chapter admins to automate sending of reports to Board members, etc.
  + \*Ability to run and download all of the chapter’s set saved reports with one click of a button
  + Ability and flexibility to generate and run ad-hoc reports, and to create new saved reports, with appropriate training, based on selected fields in database
* **Full data management.**  
  *This includes:*
  + Ability to search for and update chapter member records (individually and in bulk/collectively), and to see a 360-degree view of a chapter member/chapter membership (all information and activity, both on the national and chapter levels).
  + Editing/updating existing member records’ fields (name, address, contact information, demographics)
  + Having a “Chapter Notes” field on each member record they can update to track touchpoints, interests and interactions with that member/account that fall outside the established database account fields
  + Ability for all chapters - no matter what level of YM-platform/portal adoption - to access and update their chapter member information and records in Nimble, whether via the portal directly or uploading the data via spreadsheet or other process
  + \*Ability for chapter itself to create new demographic/info fields specific to that chapter that they can add to their members’ records in the database (e.g., “Chapter Founding Member” etc.)
  + \*Ability for chapter admin to receive a notification when a chapter member updates their own community hub profile information in Nimble (address, email, position)
  + \*Ability for chapter to create/add “prospective members” (or “prospective sponsors” etc.) accounts to the database that they can track
* **Strong event creation and registration.**  
  *This includes:*
  + Ability to create an event, set up registration fields and questions, ability to add certain questions (dietary needs, etc.)
  + Ability to indicate and restrict if event is public, members only, chapter members only, chapter board only etc.
  + Ability to indicate price levels based on member type, timeframe (early bird, etc.)
  + Ability for payment processing/options
  + Ability for Canada, Mexico chapters to set up events and charge/process in CAN or MEX dollars
  + Ability to issue refunds if event or registrant cancels
  + Registrants receive confirmation email of their registration, and if possible auto-reminders when event about the occur (chapter admin should also have manual email capability to send registrants updates about the event)
  + Events created by a chapter would appear on their chapter events page on their website, in upcoming chronological order, with past event archived in some manner
  + \*In addition, any event created by a chapter using the platform should flow up to a universal AFP Global events page collecting and displaying all AFP chapter events in one place, in upcoming chronological order, with past event archived in some manner
  + Chapter event registrations are tracked and recorded in Nimble on the account’s record
  + Chapter can pull roster reports, attendance records for each event with registrants/attendees’ name, email, other data from their registration, whether a member or not, etc.
  + Chapter can email through platform the registrants for the event (both pre- and post-event)
  + Ability to print name badges based on event registration roster
  + Ability to update/delete events without issue and initiate refunds
* **Website and community/discussion forum functionality.**  
  *This includes:*
  + Ability to set up websites with simple, standardized URLs for these chapter sites or – preferably – chapter can set up their vanity URLs to redirect to and/or mask the provided website URLs
  + Website should be a branded template controlled by AFP Global with set “universal” pages/content/navigation locked down and controlled by AFP Global that appears the same across the chapter websites
  + Website must be ADA-compliant and adhere to all accessibility requirements
  + Website must be fully responsive across all devices
  + Chapters would be allowed some flexibility in terms of branding (their logo, header images) and to create some new pages and navigation as needed
  + “Join AFP” button on chapter website
  + Ability to embed videos on content pages
  + Chapter admin rights tied to individual accounts to allow respective chapter admins to manage, update and create website content and events (this include Superadmin rights to identified AFP Global staff to be able to manage and edit all chapter sites)
  + Ability for a non-chapter admin or member to obtain admin rights/account – example is that some chapters retain management companies to run their websites – how would they be able to log in to gain website admin access if not in the database (assumption is we’d create a non-member account for them and then assign the website admin rights)
  + Ability for chapter admin to identify/restrict certain pages as public, members only, chapter members only
  + Ability of chapter admin to restrict access to certain pages, files and discussions to identified chapter subgroups (such as chapter Board members)
  + \*Ability for Canada chapters to present English and French alternate versions of their sites
  + Chapter member directory page (restricted to logged in chapter members) where user can search and see chapter members
  + Ability for chapter admin to create important forms pages to collect information (such as nominations for chapter board and committee positions, volunteer opportunities, NPD honoree nominations, etc.) that is stored and recorded in the database (of if not, then the chapter can receive this information via the form and manually add this information it to the database)
  + **^**Job board – ability for chapter to set up a job board page that allows a user to purchase a listing, process payment for listing, and listing to appear/display automatically on page in an elegant manner (or a process to support the addition of listings to the page with minimal manual work)
  + **^** Photo-gallery functionality to display collections of event photos in an elegant manner
* **Chapter Accord Process (*see Nimble requirements*)**
* **Integrations***This includes:*
  + **^**Ability to integrate their YM chapter platform to (a) third-party platforms such as Constant Contact, Cvent, Mailchimp, (b) their independent website (outside our YM offering), and/or (c) their own AMS platform
* **Training & Support***This includes:*
  + An established, scheduled training program for all functionality (website, events, reporting) - on-demand and/or regular training available on how to manage website, create and manage events, access and create reports, data access/maintenance, etc.
  + Strong tech support - resources and live (call/chat) availability to assist chapters troubleshoot all issues pertaining to the database, reporting, website, etc.