Who We Are

IESANZ is a professional membership association providing a wide range of benefits and professional opportunities for our members. Members are recognized by federal state and local governments, and include engineers, architects, educators, students, contractors, manufacturers and designers.

The association is largely run by volunteers and is looking to build a new website that will last years.

Objective

Provide a more productive and value driven website for both administration, members, and chapters which can be built upon in future updates.

The key principle to guide this is that the website has two components, the informative front end and a management CRM side for members and administrators.

The management CRM is mainly a database for members and managing memberships with additional functions like purchases and report generation.

The IESANZ is leaning towards a word press solution powered by plugins, such as Membermouse, Memberpress or Brilliant Directories as opposed to a fully custom coded solution. To ensure the proposed plugins meet our needs, it is proposed that as a part of development, plugins are tested early before any major configuration to see if they meet our needs in terms of usability and features.

Front End

Update and refresh the current front end.

Current Pages Include:

- Memberships – detailing the different grades and subscriptions
- Awards – highlighting the different awards relevant to the society.
- Chapters – each chapter has their own page highlighting new, local events, the committee and calendar.
- Member Lookup – Provides a lookup for a specific member detailing their grade
- Education – Display current education opportunities
- Conference – displays the most recent or upcoming conference that is held every two years.
- Online Store – Non-members can purchase publications and job advertisements

The above structure can change depending on design and useability advice. Some of the pages should draw on the CRM backend i.e. member lookup, chapters and calendars.

Management CRM

There are four types of users who will have different levels of access, authority and requirements:

1. Members
2. Non-members
3. Administration
4. Chapters
5. Board

Members who comprise of both corporate and non-corporate members should be able to login, update their details, renew or change their memberships.

Non-members will comprise of either new members buying a membership, buying event purchases, or buying on behalf of a member.

Administration will primarily be running reports, managing sales, managing membership requests, and purchasable items.

Chapters should be able to update their chapter page including elements such as news, and their calendar.

To assist with a quotation, the management CRM has been broken down into the feature areas below, with a few which are marked as 'Future' which could form part of the initial development but at least should be provisioned for in terms design.

Purchases

Administrators should be able to setup a variety of purchases including the publicly available publications and job advertisements but also the different membership levels for each financial year, membership upgrades, event ticket sales and event sponsorships.

Purchases should have the following features:

- Be able to handle foreign currencies, primarily NZD alongside AUD
- Allow for different tax rates (GST, NZ GST, GST Free) and go to different payment services based on location/purchased item
- Sync across to Xero and be able to generate an invoice (either in system or from Xero)
- Should be tied to account codes available from Xero.
- Update a member's status once reconciled in Xero.

Members should be able to upgrade, renew or cancel their memberships. Additionally, they should be able to find and purchase any event tickets or sponsorships along with any other purchases available.

Corporate members should be able to renew or purchase a corporate membership.

Non-members should also be able to purchase event tickets and purchases, although this could tie into a revised public store.

Purchasers should be able to purchase on behalf of someone else.

Events can have a variety of different price points and purchase scenarios including:

1. Different prices for members and non-members
2. Multiple levels of sponsorships

Communicating to Members

There should be a bulletin board with full range of formatting options.

Members should have access to calendars updated by administration or chapters to see upcoming events.

Members should be able to have the ability to choose their communication preferences including different types of communications.

Administrators should be able to schedule communications to be automatically sent.

One of the goals here is to improve the usability of communications we send out.

Reporting

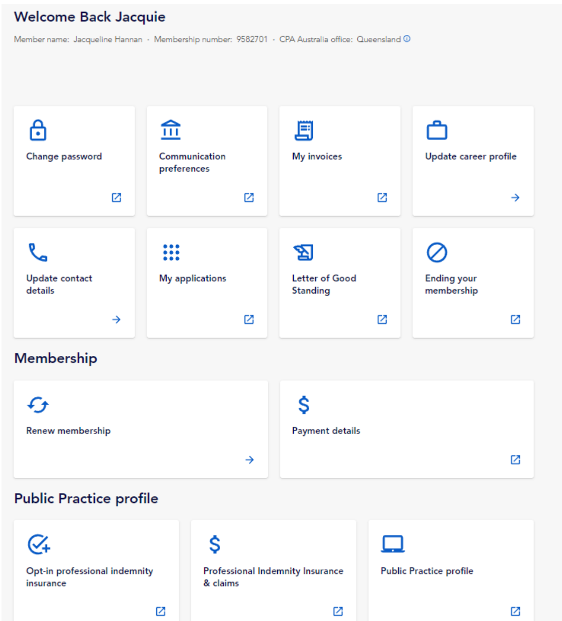
The new CRM should a reporting capability, including a reasonable reporting capability. Majority of reporting relates to memberships, such as looking at who is a member, checking for errors from manual updating of memberships and reporting on membership statistics.

The critical requirement here is being able to report on a historical basis i.e. a report run February should be able to tell me who was a member at the end of January excluding any new or renewed memberships that occurred in February.

User Accounts & Memberships

The website should support access control based on their user type for certain features. Different dashboards should appear based on their type.

Example – CPA Dashboard:



Xero Integration

The website needs to integrate and automatically update Xero. This includes creating sales invoices, updating contact cards, creating receive/spend money transactions with full usage of fields and tracking categories. Note that there are multiple bank accounts, and payment services which may change in the future. The website needs to support to some degree updating the payment methods and automatic imports into Xero as opposed to hard coding. This could be achieved via a third-party plugin.

Event Management & Chapters

This is a space where each chapter's event coordinator can see on each event, who has paid, raised an invoice not paid, and run reports on past events.

Additionally, Chapters should be able to also update their own landing page on the front side.

Tools and Resources Section

This would assist members (potentially non-members) by providing a clear are to access:

- Policy and Advocacy
- Upgrading memberships
- Career development (Courses, events, engagement opportunities)
- Also look at a register so people can search our member profiles (if looking for a MIES to approve certification etc.)

Corporate Accounts – Future

A corporate account is for businesses to manage their engagement with IESANZ.

1. Allow for the purchasing of Corporate Members and manage their members lists.
2. Allow for the purchasing event tickets and sponsorships.
3. View and report on both above.

A corporate account would possibly have two status's: IESANZ managed and self-managed. The idea being that purchases made are still linked and changes to memberships still viewable if it ever switches to self-managed.

Continued Professional Development – Future

Add support for members to track and monitor their continued professional development.

Example from CPA of their CPD tracker:

Dashboard for Administrators – Optional Future

This would be where the secretariat and accounts can see any both current statistics and current issues.

Statistics might include current members count, previous members count last financial year, list of lapsed memberships etc.

Current issues might include alerts to failed payments, failed imports, members who need assistance, when imports into Xero have failed etc.