

To: ACCT Board

From: John Voegtlin, Office Manager

Date: 01/13/2025

Red - needs input

Yellow - in progress

Green - finished

Black - unstarted

## Membership:

Project	Summary	Status / Needs
<b>Membership Rate Increase</b>	In the interest of <b>"let's never wait 5 years again."</b> I'd like some conversations about how often and how much we <b>should</b> increase rates. Where is the balance between too often and not often enough?	Needs BOD input
<b>Membership Policy implementation and communication</b>	<p>Toggle to "Agree" has existed in the Member Profile since June. How high a priority is compliance?</p> <p>~525 of 1900 good standing records - company and individual records (both inheriting &amp; individual members) - have clicked "I Agree"</p> <p>New records, and profile edits, must. Should I start including a targeted reminder in newsletters or direct standalone messaging?</p>	<p>Will Draft Reminder Messaging</p> <p>would like BOD input on the level of urgency.</p>
<b>Welcome Packet</b>	<p>An email drip campaign (called a customer journey at mailchimp) that starts when becoming a member the first time. It is currently a series of 5 emails tentatively set a week apart that include a general welcome and introduction, then a Benefits overview, then a brief explainer on ANSI ASD status as well as TIRE as the writers, and the Programs group(s) that implement the standards, then volunteering and the organization chart, and finally, the conference opportunity.</p> <p>There's room to expand this into more messages, and there are absolutely updates needed since the time that the Membership Work Group originally drafted these.</p>	drafted, but in need of maintenance and updates before launch
<b>Expired Messaging</b>	Idea started as extension of additional billing reminders and existing messaging to expiring members in the first year of the new platform but will probably be transitioned and completed by Brittany and the Membership work group: Communications sent to expiring members asking them to come back.	<p>ongoing (by Brittany)</p> <p>Will still support Mailchimp needs</p>
<b>Conference Support</b>	Being first-line support for members attempting to register has been different this year, but still an extremely time-consuming effort. Overall, I'm happy with the additional knowledge and control that building the registration ourselves provided.	Completed

<b>Acquisition journey</b>	I believe a schedule and general content could be created for gentle reminders of the benefits of ACCT membership for prospects we acquire as expired members, operations we learn about through word of mouth, non-member conference attendance, standards purchases, etc. It has the potential to branch into more specific content based on information we learn based on interaction or other intel.	Not started yet, will be produced by Brittany  Will still support Mailchimp needs
<b>NPS</b>	Net Promoter Score as built-in Novi feature. Would like suggestions for frequency and follow-up questions Read Basics here: <a href="https://help.noviams.com/en/articles/8884991-nps">https://help.noviams.com/en/articles/8884991-nps</a>	Not started

## Academy:

Project	Summary	Status / Who
<b>Sample Content</b>	Create more sample course examples for Academy Development work group to refer to and use as templates for new content creation.	Ongoing
<b>Evaluate Current Content</b>	Work with original creators and Academy Development work group to confirm current relevancy of content and then work to convert content to a "course" structure with the addition of an assessment, knowledge check-ins, contributor information, and identifying "bundles" of existing content that could be combined into a course.	Ongoing
<b>Build "Disaster Response" Course / Series</b>	so far, I've just been trying to keep in the loop of ideas flowing from outside sources	Ongoing
<b>Evaluate "Rebuilding After COVID" content</b>	existing package of content that that will no longer be hosted at some point in the Spring and has been offered to us if we're interested. Unsure of the full agreement, but I'm in the investigative stages, seeing if it would transfer / convert to our platform without too much trouble.	Ongoing

## IT Functions:

Project	Summary	Status / Who
<b>Engagement &amp; Conference App Demos</b>	Helped Finalize decision on MobileUp as a conference app and will evaluate it's ease of use and connection abilities as a future year-round engagement platform	Ongoing

<b>Regulation Map</b>	<p>Transitioned all current data from a Wordpress Plugin to an up-to-date version of the codebase that is hosted by the developer and embeddable on a page on our main site.</p> <p>This latest version of the map code is easier to edit and maintain, and makes adding a layer fairly easy, which could provide us with an easy way to expand the regulations that we track beyond the US map.</p>	<p>RegMap transition finished</p> <p>Content still needs updating</p>
<b>Revamp of Volunteer &amp; Staff Reimbursement form</b>	<p>Goal was to simplify the visible options for user types that do not need to see every option. Spent some time trying to build one form that could use Jotform's logic to bend to each user's needs, but the large number of repeating fields is a manual scaling effort, Jotform is not scalable in this direction, especially in regards to editing, so we opted to create a few clones of the form for those user types.</p>	Completed
<b>Conference Registration Build-out</b>	<p>Built conference registration flow on Novi's event platform with equivalent discount and tracking abilities as our previous CVENT builds.</p> <p>Since build-out, I've needed to adapt and provide the lead-up and on-site services that we depended on CVENT and HPN for in previous years to this year's conference.</p>	Completed

### General Office Manager/Other/All of the Above:

Project	Summary	Status / Who
<b>ANSI Consensus Group activities</b>	Navigated supporting the Board, acting as ASD, and standing Consensus Body as their Secretary. Will continue to maintain records for next audit.	Completed
<b>BOD Election Support</b>	Adjusted, with Board help, communications, and voter list-building efforts to new Election structure and procedures	Ongoing
<b>Newsletters</b>	Continued consistent newsletter schedule - ready to hand-off to Brittany	Ongoing with PR & Marketing Work Group Support