

DATE: 10/20/2025
TO: Cathy Lee Gierke, Jerry Rinehart, OCC Co-Chairs
FROM: Cathy Lee Gierke, Webmaster
RE: Annual Report 2024-25, web and member database

Charge to the Committee (Briefly, one sentence)

Manage web resources for UMRA, design and technical aspects. This includes UMRA.umn.edu and the member portal. This year the member portal was converted and moved from retirees.umn.edu to UMRA.wildapricot.org

Committee members (include any designated duties)

I collaborate with Kris Mortensen, Kathy Jensen, Virgil Larson and everyone who has materials on the website. Kathy does work with graphics on the website, and adds new event to the UMRA calendar. Kris adds articles to the website.

Focus of activities and key outcomes/accomplishments of this committee this year

This year the member portal was converted and moved from retirees.umn.edu to UMRA.wildapricot.org

Policy issues or changes over the year? Why?

Many key processes changed as a result of the member portal conversion. Much of it is documented on the UMRA google drive "UMRA Database Review" and the new member portal, <https://umra.wildapricot.org/Admin-Help>

Challenges or problems faced/solved? Innovations?

The new system has a plethora of new features...and requires many people to manage. So many different functions within UMRA come together in the member portal, making for some details and complicated process.

Suggestions for future chairs/leaders

The work on refining, standardizing and simplifying processes will continue. If all events can be treated similarly, it helps make the process easier for everyone.

What could UMRA leadership do to enhance your committee's work?

Continue to encourage a high standard for the information in the member portal, and give feedback where improvements can be made.

Suggestions for what you and/or the organization you work with could do that would help UMRA move forward?

Virgil Larson has expressed a desire to pass on the membership management position. We could use help with this.

UMRA MEMBER PORTAL CONVERSION

NOV 2024 – MAY 2025

Conversion team members: Cathy Lee Gierke, Kathy Jensen, Jerry Rinehart, Ron Matross, Michael Austin, Virgil Larson, Jane Glazebrook

The following is an outline of the process and rationale for the member database conversion.

WHY WAS A CONVERSION NEEDED?

The member database was started around 2015 to help us keep track of membership renewals and event registrations. It provided a minimal features set. And was maintained for us at no cost by Max Fierke, who developed it while a student worker at Carlson School, under David Nauman's direction. David was a professor at Carlson School of Management and worked with Carlson OIT to get the system started.

After 20 years, the software was outdated, and Max was ready to turn over his responsibilities.

ASSESSMENT OF REQUIREMENTS (OCT 2024)

Cathy wrote a list of requirements to use for reviewing software options. After reviewing dozens of options she selected a dozen to review further with the team.

The team reviewed database requirements, discussed, prioritized, and proposed additional software options. We further narrowed down the list of possible software options.

REVIEW OF ALTERNATIVE MEMBER MANAGEMENT SYSTEMS (DEC 2024)

Team members divided up the 12 potential options and researched them in more depth. Met and presented pros and cons of each. Narrowed it down to 4.

INTERVIEWS WITH REPRESENTATIVES FROM TOP SOFTWARE SELECTIONS (JAN 2025)

Met with representatives from our top selections and asked them about each requirement from our prioritized list of requirements. Asked to see examples.

SELECTION OF MEMBER MANAGEMENT SYSTEM (FEB 2025)

Presented our selection to the board for approval. Continued to research the ability of WildApricot to meet the needs from our requirements list. Met with UWI to learn more, and get details.

Details of renewals process, and events setup, magic button, guest sign ups, unbundling memberships, payment system, multiple event payments, credit cards, etc.

CONFIGURATION AND EXPLORATION OF WILDAPRICOT (FEB-MAR 2025)

Discussion of details learned and policy issues; input from leadership on policy issues; planning communications emails; layout and write documentation for users, organizers and administrators; finalizing renewal process details; finalizing profile layout specifics.

RELEASE AND INTEGRATION WITH UMRA WEBSITE AND OTHER PROCESSES (APRIL-MAY 2025)

April was mostly spent learning how to import all of our members – only member profile and member since dates could be imported.

The May hike, and May Forum were our first events where registrations were held in the new system. This gave us a good taste of what to expect, and helped us identify additional documentation and processes needed. As well as what additional volunteer positions we needed to run Wa.

Held a meeting with volunteer organizations to establish the capabilities of WildApricot, and how it can serve event organizers.

CONVERT ENEWS TO BE SENT VIA WILDAPRICOT (SEPTEMBER 2025)

The October eNews went out through WildApricot. This allowed us to get rid of our Google group, and no longer need to do regular updates of this external email list.

ADDITIONAL VOLUNTEERS ADDED FOR VARIOUS TASKS

Michael Austin: doing event setup

Fumiaki Katagiri: sending all-member emails