

ERICSA Call with Courtland Consulting
Call Notes
February 16, 2016

Participants:

Margot Bean
Terri Nickel Matson
Christine Jennings
Carla West
Melissa Rael
Steve Trudell, Courtland Consulting

Christine led the call. Terri and Carla recorded minutes of the meeting:

Minutes of the Meeting:

Steve stated upfront – No additional billing for Courtland support provided in the past. Courtland at some fault with confusion over billing and services. Steve wants ERICSA to be happy with the site and getting the support we need. Big things covered in maintenance are upgrades to CiviCRM and security patches, on a quarterly basis. Password resets and straightforward questions also included. If requests involve a lot of back and forth, then it will be billed.

Christine - How can we identify up front as to what is a simple request and what is a billable request? There is a lot of email communication going back and forth between Corrina and Greg, but we cannot determine from this how much time Greg is spending at his end to address the issues. This is where we need to get an agreement. Per Sharon Puzziti, Greg keeps track of his time and identifies it as either billable, not billable or he puts a question mark by it. We are a non-profit organization and we are trying to budget correctly. The Tech Committee recommended to the Executive Committee to budget for two hours of 'extra' support.

Steve – I can talk to my team to make sure that we know up front. Courtland logs time in 15-minute increments I got a bill of close to 20 hours of activity and questioned my staff if they had communicated to ERICSA how much time they had spent. I want to establish a line in the sand as to what is covered and what is separately billable. I do not think the two hours per year that ERICSA budgeted is sufficient for what my staff will have to do to support us. CiviCRM is a very powerful product that has all sorts of functionality built in. I am concerned that since you have only one major event a year that you will be able to learn it all and be proficient. One of the things my staff indicated was that we gave you a quote of how much time it would take to get the 2016 conference set up. You decided to do it on your own, and then we provided more time over that quote to get it set up. Maybe we need to spend more robust time in training. I am not sure that you can become proficient. Two hours' worth of training was included in our original contract.

Carla – Tim Morrison and I sat through one hour of how to navigate around the CRM and upload documents. Tim may have received additional training on the registration specifically.

Melissa – We were not trained on the registration piece of CRM. Corrina and I did one 30-minute training with Sandi Beach on updating the ERICSA website; never did a training to CiviCRM to use as a registration platform. We were shown how to access to CiviCRM toolbar, but we never did a test registration/editing a registration, etc.

Christine – Isn't CiviCRM a Drupal product that is used by other organizations?

Steve – Yes, but training is a big issue – maybe we need to do another one-hour training on the CiviCRM. There is also a manual that we provided to ERICSA.

Christine – What about upgrade issues? There were fixes that needed to be done, but we assumed that no cost would be passed on to us since you selected CiviCRM. Is this correct?

Steve – There were a couple of bugs were found and when a patch was installed it corrected the problem. We have done two patch upgrades, which are covered in the maintenance program.

Steve – The email bounce back issue (hosting company limited to 400/hour) was a big problem. We installed Mandril at my direction at no cost to you. There will be a cost of \$9.95 a month. We will have to address the increase in our monthly bill taking it up to \$185.00 a month.

Christine – We need to follow the chain of command, particularly when it includes a cost to the organization that exceeds our budgeted amount. Christine explained that the TC must assess the need for a new cost and make a recommendation to the EC as to approval. We are concerned that the decision to upgrade to using Mandril was made without our approval.

Steve – There will not be an expense until contract renewal, if there is an expense. Our contract can go up or down based on what is going on. Courtland will eat the 9.95/month cost through the term of this contract. I understand that it was a major issue that I interpreted as a huge problem. It should have not been set up that way – and I said it must be made right and the costs will not be passed to you until the contract is renewed.

Christine – Who has ownership of the hosting/server? Were our requirements factored into the decision of which company Courtland picked?

Steve - No company advertises their email output as they are trying to protect against spamming. We did not know about the limitation when we selected the hosting company. When we became aware of it we implemented the Mandril system, another layer on top of the hosting company. Mandril still has limitations but the hosting company will not put a block on the number of emails being sent by Mandril. I will absorb the monthly cost as long as I need to.

Steve – ERICSA always had the issue with emails bouncing since Day One even if we were not aware of it. Sharon Pizzuti discovered it when she did not receive an email and started looking

at the email logs. ERICSA should know how to read the logs and see if emails are not going out properly.

Christine – If there are any other costs that come up, we would appreciate the chance to review and make a decision as to accepting those costs.

Steve – If we know up front that there are going to be any costs incurred, when it gets to the point to where we need to know what is going on, we will do another one-hour training to make sure ERICSA can get self-sufficient. With your budget limitations ERICSA needs to become self-sufficient. This is not a money making device for Courtland, but we are a big supporter of the organization.

Steve – Courtland is willing to spend a few minutes on our Tech Committee calls each month; they want to hear about any issues.

Christine – We would appreciate Courtland's participation and could make it a standing agenda item for their input at the beginning of our monthly meetings.

Meeting Outcomes:

1. Steve will let us know up front that we have asked for something that will be billable.
2. ERICSA will not be billed for any 'extra' work done to date.
3. ERICSA will not be billed the additional 9.95/month for Mandril under our current contract. We may be billed for this service when the new contract comes up.
4. Steve will reach out to Sandi Beach to set up the one-hour training with Melissa and Corrina (and others, if needed).
5. We will invite Courtland to attend our monthly Technology Committee calls.

Respectfully submitted,

Christine Jennings, Chair, ERICSA Technology Committee