

Eastern Regional Child Support Association

Technology Committee

January 9, 2015 Call Notes

Present:

Christine Jennings, Committee Chair
Lara Webb Fors
Pam Sala
Loretta Everett

Discussion items:

- 1) We agreed with the ratings Michelle LeFevre captured in our January 7 post production meeting with Courtland.
- 2) We agreed to being included in Courtland's portfolio as a 'case study.' We relayed that we want to review what Courtland writes up before they post anything (as Michelle captured in her minutes).
- 3) As to the point of contact for a reference:
 - a. The ERICSA President and the Technology Committee chair will be the point of contacts.
 - b. Either the ERICSA President or the Technology Committee chair may respond verbally as to our experience with Courtland as our website vendor.
 - c. The ERICSA President would provide any written reference after reviewing it with the Executive Committee and the Technology Committee chair.
- 4) We will submit a testimonial to Courtland, reserving the right to review what they add to their portfolio.

Additional activities following the January 9 committee meeting:

- 1) Christine sent a draft testimonial to the committee members by email on January 9 with the request for edits:

"The experience of the Eastern Regional Interstate Child Support Association (ERICSA) as a customer of Courtland Consulting's website delivery team was both positive and productive. We particularly were pleased with Courtland's responsiveness and ability to work with us as a non-profit organization whose website committee comprises child support professionals who participate on a volunteer basis and a contractor for our organization. Courtland Consulting website delivery team was able to assist us through the entire process of transitioning from an existing website to a new one in a successful and timely manner and delivered a website of which we are proud."
- 2) Unfortunately, problems arose with Courtland's ability to provide a printed report on registrations to meet Tim Morrison's need. There were multiple problem tickets opened without satisfactory resolution. On January 19, Tim wrote Sandi Beach:

Rather than assume you are seeing or hearing about the various "tickets" and exchanges between myself and Greg, Holly and the rest I wanted to express directly to you a major concern that has arisen.

The event reports that are producible from CiviCRM or Drupal are inadequate for our needs. It appears not only are they inadequate but there is no hope of gathering the information needed without doing a customized form for which your folks are currently working on a price to create.

I guess shame on me for assuming that if we asked questions on our conference registration form that we would have the ability to retrieve that information in a report. My assumption could not have been more wrong.

The question that begs to be asked is simple – if I am asking for information on a registration form – isn't logical that I want to be able to retrieve and use that information?

The reports do not even give me the name of the company/organization/agency that the registrant lists on the form. It only goes on from there.

Sandi, my disappointment quickly turned to frustration and is rapidly turning to anger when I am told the information I need isn't retrievable unless or until it is developed and programmed at an additional cost."

- 3) Michelle LeFevre responded to Tim on January 19 with a quote from Courtland to produce the report he needed. They relayed they were giving us a discounted cost of \$650 to produce the report.
- 4) On January 20, Christine sent the committee members the following email:

"Based on this situation, how do you think we should proceed? I don't think any of us expected we wouldn't be able to track registrations in an automated fashion through our new website. Based on the many emails that have gone back and forth between Tim and Courtland it seems Courtland will want additional monies to produce a report for us to track registrations.

FYI – we have not finalized the testimonial Courtland requested from us. Please see the attached email in which I sent a draft for us to consider sending. The issue concerning reports was outstanding at the time of our call with Courtland on January 7. We wanted Tim's issue with registration reports to be resolved before we gave feedback first

I think we need to discuss the current situation before sending a testimonial as well as how we rate our final response to the area of "Website Custom Tools" for which Courtland requested feedback. I've attached Michelle LeFevre's email, but here is the area in question as captured in Michelle's notes:

'Website custom tools - 0

Comment – Leaving this item as 0-N/A until the reports are customized to what ERICSA needs.

Tim - Without rating the Reports the CRM and registration process is a 5. Default and custom reports are inadequate for our needs – need one report. Ticket logged to address this issue.

Courtland support team is very responsive to questions'"

- 5) Carla West responded that she was calling an Executive Committee meeting to review the following:
 - a. Courtland advised Tim Morrison they could not produce the report he needed. They relayed that they would have used a different platform if they knew more ahead of time about the type of report needed.
 - b. Courtland gave us a quote of \$650 (which they said was half the discounted cost of the hours they would need to expend to produce the type of report Tim needed).
- 6) The EC voted to pay the \$650 to avoid problems with conference registration and tracking. First, however, Carla contacted Steve of Courtland to review the situation. Steve relayed that this was both parties fault for not communicating effectively on requirements. Carla exercised the contract for \$650 with Courtland.

7) On February 6, Carla, Tim and Christine exchanged emails regarding the situation:

Carla: *"I guess that is our answer from Steve, nothing else off. I think we just pay it and move on. Good lesson to learn that we need to be more aggressive from the very beginning on our expectations of the end product and reports that we need."*

Christine: *"I think they met our expectations about the look and feel of the new website. Unfortunately, it is not uncommon for custom reports to end up costing more than what people think, both from the customer and contractor's point of view. This is typical even on large systems when reports are required unless there is a built in ad hoc reports capability."*

I do not believe Courtland has had much experience in generating reports (the web work may be a newer venture for them than we realized). We saw how happy Michigan was with their website, and I don't think any of us expected to hear that association does all of their reports manually."