# E-Communications Policies & Procedures

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**Email Policies**

The Oregon Chapter APWA uses email as a primary means of communicating with its members. Members are responsible for providing accurate email addresses if they wish to receive chapter email communications (see procedure for updating member email information).

The chapter recognizes that its members are busy professionals, many of whom work in the public sector. Therefore, the chapter reserves the use of bulk emailing ("e-blasts") as follows:

1. Content is limited to information about chapter events and activities, unless otherwise approved by the chapter board of directors.
2. The number of emails sent, in total, is limited to 10 emails per month, unless otherwise approved by the chapter board.
3. Permission to send email on behalf of the chapter is limited to those individuals designated by the chapter board.
4. The chapter's email roster (i.e., the set of members' names and email addresses obtained from National APWA) will not be sold or shared with any third party business or individual unless approved by the chapter board.

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**Best Practices for Composing Chapter Emails**

- Place meaningful information in the subject line.
- Use "blind copy" (BCC) or other features that prevent "reply all" or the harvesting of members' email addresses.
- Brevity is encouraged.
- Attachments of documents and images are strongly discouraged.
- Photos and other images can be embedded in emails if they do not function as attachments.

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**Changing Your Email Information on the APWA National Member's Only Web Page**

The Oregon Chapter of APWA obtains membership information, including members' email addresses, from a database managed by National APWA. APWA members can view or change their member information on a web site provided by National APWA. To access your online member information:

1. Go to www.apwa.net.
2. On the National APWA home page, click on "sign in" (upper right corner of the page)
3. Sign in by entering your UserName and Password; alternately, create an account (note: you will need your APWA membership/ID number to create a member account)
4. Once you've signed in, click on Member Tools in the navigation column on the left
5. From the list of options in the main column, click on Update Contact Information
6. Scroll down the Contact Information page to the E-mail/Verify E-mail fields; correct as appropriate.
7. While you're on this page, check your other information to make sure it's correct
8. Be sure to click the "Submit" button at the bottom of the page

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**Accessing the Chapter's Gmail account**

The Oregon Chapter maintains a Gmail account at oregonapwa@gmail.com. Access to the Gmail account is limited to those individuals authorized by the chapter board. Email sent to oregonapwa@gmail.com can be forwarded to other email accounts by changing the Gmail account settings; it is recommended that all Chapter Gmail be automatically forwarded to A representative of Cameo Management. Here is the access information for the Gmail account:

Members with chapter admin permissions can obtain this information at oregon.apwa.net (select the page titled Special Information). Otherwise, contact Eric Jones at 541-954-2938.

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**Using MailChimp Service**

MailChimp is a third-party service designed to manage email to large distribution lists (contacts) and to track the results of those email contacts (campaigns). In September 2014, the Oregon Chapter APWA started using MailChimp to send "e-blasts" to Oregon Chapter members (see Email Policies).

Use of MailChimp to send email to chapter members is limited to those individuals designated by the Oregon APWA Chapter Board. If you have the appropriate permissions, here are the steps for sending email via Mailchimp:

Go to www.mailchimp.com
Click the Log In button in the upper right corner of the page

Members with chapter admin permissions can obtain log in information at oregon.apwa.net (select the page titled Special Information). Otherwise, contact Eric Jones at 541-954-2938.

- Once you've logged in successfully, you'll want to create and send a campaign (in this case, an email)
- Click Create Campaign (button in upper right)
- Select "Regular Ol' Campaign" from drop-down menu
- Select a list (typically Oregon APWA Members); see procedures for updating list of Oregon APWA Members)
- Click Next (bottom right)
- Fill in the Campaign Info
- Name of campaign is for internal use only
- Be sure to write a meaningful "Email subject"
- Leave "From" (Oregon APWA) and "From email address" (oregonapwa@gmail.com) as is
- Leave other settings as they are set by default
- Click Next
- From the list of templates, click "Select" to select "Simple Text" (last option); note: as we learn more about MailChimp we will provide additional procedures on the use of other templates and message formats
- Follow the on-screen directions. Hover your curser over the instructions on the left side of the screen. A dark gray shaded block will appear. Click on the block and the screen will split and an text editor content box will appear on the right side of the screen. Use the text editor on the right side of the screen to write your email message. The instructions from the left side of the screen will appear in the text editor and should be deleted. A simple email message may only require one content block. You can further enhance the text using basic text formatting options such as bold type, italics, insert hyperlink, etc. Delete (trash) unnecessary content blocks.
- On the top navigation strip, click on "Preview and Test" and select "Enter Preview Mode" from the drop-down menu. (It may be helpful to have the "view header info" in view mode).

- Close the preview mode by clicking on the "X" in the upper right corner of the page.
- If you want to test a test message (to yourself, for example), click "send a test" from the preview drop-down.
- Now that you've created your message, you need to send it. On the bottom nav bar, click "confirm" or "next"
- You'll see all the configurable elements of your campaign (email): the list of who will receive it, the subject line, etc. Edit as appropriate.
- All set? Hit "schedule" (to schedule date/time for the release of the email) or "send" to send it right away.
- Once the email has been sent, MailChimp allows analysis of the results (how many emails were opened, etc.). More documentation on the reporting functions will be provided as we learn more about this service.

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**Updating MailChimp Lists**

To send email in MailChimp you need a "list of subscribers." This is the list of people to whom you want to send email. One important list is the list of Oregon AWPA members. The information for this list – which includes the first and last name and email address for every Oregon APWA member who has an email on file with National APWA – comes from APWA National's membership database. Other lists might include members of a chapter committee or members of a group putting on a major event such as a chapter conference.

The National APWA membership database is dynamic – it changes each time a member joins or leaves the association. The Mailchimp lists are static – they do not change unless someone manually changes them. At this time there is no way to automate synching the two databases. However, it is important to update the MailChimp list data on a regular basis, especially to ensure that new members receive valuable information about the services and opportunities that come with Oregon APWA membership. To update a MailChimp list that uses data from National APWA's membership database you need permissions to access MailChimp and permissions to access National APWA's membership database.

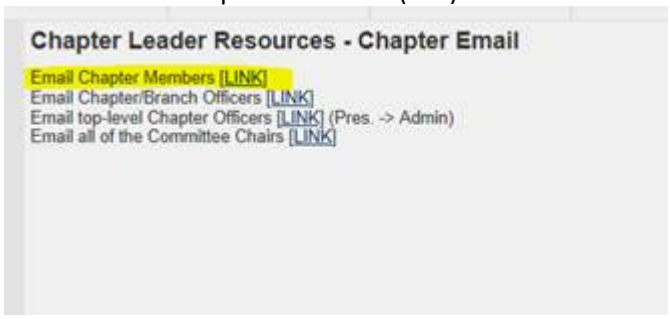
For these reasons, the Oregon APWA Chapter Board has set a standard that the MailChimp Oregon APWA Members list be synched with the National APWA membership database at least once a month. The chair of the chapter's Membership Committee is responsible for implementing this standard; the committee chair may delegate this responsibility as appropriate. The chapter board will authorize the appropriate chapter members to receive permission from National APWA to access the National APWA membership database.

Once the necessary permissions have been obtained, the following procedure is used to synch MailChimp's Oregon APWA Members list with National APWA's membership database:

- Go to www.apwa.net and sign in; this will take you to the Members Only section of apwa.net
- Click Member Resources in the left navigation bar
- Click Chapter Roster under Member Resources
    - Alternately, use this process to access the chapter roster:
    - http://www2.apwa.net/MembersOnly/ChapterResources/ - click on Chapter Management

    - Then click on Email Chapters about 3 sections down

- Click on Email Chapter Members (link)




- Fill out who it's from area and then it will proceed to this area:

- Read and accept the agreement of use
- Select Microsoft Excel as the report format
- Click Generate Report
- Download the file, click through any warning messages, and open the file in Excel
- Sort by the Email field (column labeled Email)
- Delete rows in which the email field is *WITHHELD* (approximately 11 rows) or blank (approximately 53 rows); note that the original membership list has approximately 760 rows, but the "cleaned" list has approximately 695 rows)
- Delete all columns except FIRST_NAME, LAST_NAME and EMAIL (i.e., there should be three columns left)
- Click save as and choose file type .csv (comma delineated)
- Save the edited file to your local computer; be sure to save it in a place and with a name that you can find later
- Close the Excel file and close the apwa.net web site
- Open MailChimp and log in
- Click the three-bar image to the left of the chimp (upper left nav bar)
- Select Lists
- Click on Oregon APWA Members
- Click on Manage subscribers
- Click on Delete all subscribers

- Yes, you're sure you want to delete all subscribers, so type DELETE and then Delete All
- Click Add subscribers/Import subscribers
- Click Import from a CSV or TXT File
- Browse to the . csv file you created earlier and upload list
- When the columns have successfully matched, click "Complete Import" below
- Click "Email me when it's done"; enter your own email address (otherwise the results go to oregonapwa@gmail.com by default)
- Review the email from MailChimp and fix any errors noted in the exception report (typically an attachment)
- The list of Oregon members is now updated

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**Editing OregonAPWA.net**

The Oregon Chapter of APWA has maintained a chapter web site since 1998. Since its inception, the web site has served to connect people and keep members up to date on chapter initiatives and events. It has housed committee pages, chapter newsletters, board minutes, conference information and job postings, among other things.

For many years the chapter's web site was located at www.oregonapwa.org and hosted by Alyrica Networks, an Oregon company. Beginning in 2012 the chapter board set a goal of migrating to a web platform hosted by APWA National. There were a number of reasons for the migration. The arcane open-source html coding and need for specialized web-editing software on the original web site severely limited back-end access; only a couple of people in the Oregon Chapter could edit the site, and new online services presented increasingly difficult challenges. Additionally, web design standards evolved, and the "homespun" style of the original site was out-of-date. And National APWA's web template brought the Oregon Chapter closer to the look and feel of other APWA chapters around the nation. In fall 2014, the initial migration was completed, and the Oregon Chapter had a new web address at www.oregon.apwa.net.

The policies and procedures related to creating and editing web pages on the new web platform are intended to support the values that led to the creation of a new web site in the first place: accurate information presented in a timely manner, consistent design, easy to manage content, and inclusive and decentralized editing access. Based on these values, the chapter board has developed the following policies and guidelines:

- Permissions to access the various functional areas of the web site are limited to those members and non-members designed by the chapter board.
- With that caveat, the board supports decentralization of the web editing functions and encourages the involvement of chapter committees and others who have an interest in using the chapter web site to advance the chapter's mission and strategic plan.
- Content posted to the chapter web site should relate to the chapter's mission and vision; inappropriate content may be removed at any time without notice at the discretion of the board.
- Page owners and content providers are encouraged to review information carefully to make sure it is accurate, and web pages should be checked frequently to be sure it is timely and relevant.
- When creating pages and posting content to the web, design creativity should be balanced with the goal of having a consistent look and feel on the chapter's web pages.
- Filing protocols should be observed to ensure that the web site is easy to manage now and in the future.

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**Specific Protocols related to the Document Library**

- No files should be placed in the root directory. There should only be seven folders, mimicking the site's top-level navigational structure.
- All files should be placed in the appropriate root folder (e.g., all Awards files should be filed in the Awards folder)
- While there aren't rules about subfolder structure, we encourage committee members and others with access to the document library to use subfolders to further organize files in their area. So, for example, there are subfolders for Applications and Forms under Awards. Perhaps other folders such as PACE or Top10 might help further organize the content in the Awards folder.
- Please note that there are several "resource types" in the upper left corner of the document library nav column. "File" is where file types such as pdf or doc should be stored. Note that there is another "resource

type" called "image." This is where image file types such as jpg or tif should be stored. Note that, like the resource type = "file," the folder structure under "image" mimics the site's navigations structure with seven root folders. Again, the purpose of this rule is to organize potentially hundreds of images so that future committee members and web editors can easily find and link to the appropriate files in the document library as they build and edit pages.

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**Web Editing Procedures**

The following is a brief summary of procedures to create and edit content on the chapter's web site. At a very high level, the top-level structural navigation is set (Chapter, Committees, Events, News, Connections, Scholarships, and Awards). Pages fall under one or more of the top-level categories. Pages include text placed directly on the page, images embedded on the pages (linked to the image directory in the Document Library), links to documents in the Document Library or elsewhere on the internet, and feeds and other automatically generated content such as event lists on pages that support automatic content functions. For more detailed information on editing on the National APWA web platform, see Contacts For More Information.

- Open a browser. Google Chrome is the browser recommended by APWA National technical staff.
- Go to http://oregon.apwa.net and sign in using your National APWA User Name and Password (your permissions to access this site are tied to your login identity).
- In the upper right corner, click on Control Panel.
- The functions you see in the Admin Control Panel depend on your permissions. The complete suite of control panel functions includes:
    - Page Manager (used to create and edit web pages)
    - Menu Manager (used to surface web pages in the site's navigational structure)
    - Feeds Manager (used to control feeds on pages that accept feed content)
    - User Permissions (used to manage the assignment of permissions)
    - Event Manager (used to create and edit events and how they display in the web site)
    - Document Library (used to store documents, photos and other files used on the web site; please see Specific Protocols related to the Document Library)
    - Photo Albums (place to create photo albums, not where most image files are stored)
    - Message Center (currently not operating)
    - Registration Manager (used to manage registrations for events)
- Use the control panel functions to create and edit pages, surface them in the web site, enter and display events and perform other web-editing tasks.
- Be sure to save your work; the web-editing software typically first presents an editing view of the content (with wysiwyg controls), then generates a preview before it offers you the final action to save your work.

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**For More Information**

- APWA TV (YouTube chapter website template tutorials) - https://www.youtube.com/user/apwatv
- Eric Jones, chair of the Chapter Communications Committee, eric.r.jones@ci.eugene.or.us, 541-682-5523
- Jenifer Willer, Chapter Board Director, Jenifer.M.Willer@ci.eugene.or.us, 541-501-0376
- Ashley Wilson, National APWA Technology Support Specialist, awilson@apwa.net, (816)595-5232

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