



ICPA TECH TEAM Federal Conference

Judy Purvis-NSW

On behalf of the ICPA Tech Team, I am pleased to provide an update on the work undertaken over the past year, the challenges we have managed, and the exciting work now being considered for our website and membership database.

Overall, ICPA's Federal and State websites and the membership database have remained stable and reliable. Much of the Tech Team's work happens quietly in the background, but it is essential to keeping our membership, communications, online payments and conference systems operating across the organisation.

Work completed during the year.

- Implementing website security updates, maintenance and database support;
- completion of the Family Information functionality and improvements to Brevo email preferences;
- support for conference websites, registrations and separate conference shops where required;
- ongoing training and assistance for website, database Users and Brevo representatives; and
- Updating training manual.

The Tech Team has also assisted with the review of its Terms of Reference, Role Description and related security and governance documents. These documents clarify the responsibilities of the Tech Team, Councils, authorised users and our website developer, and strengthen the way we manage access to member and organisational information.

Security.

During the year, an attempted security breach involving a user account was identified. Although the account was compromised, the safeguards already in place prevented access to member and organisational information. The account was removed and a new one established.

This incident reinforced the importance of individual logins, not sharing passwords, enabling Two-Factor Authentication where available as soon as possible, and promptly advising the Tech Team when an authorised person changes role or no longer requires access.

Brevo membership renewals.

One of the greatest challenges this year arose when Brevo (the digital marketing and customer relationship management (CRM) platform we use to send newsletters and renewal notices) changed its platform and removed the automation used to send scheduled membership renewal notices. The available upgrade would have increased our annual cost from approximately \$2,000 to \$9,800, which was not considered a viable option.

To keep renewal notices operating, Mark from Enrega (website developer) developed an interim arrangement that required membership data to be manually imported into Brevo each day before noon. While this kept the process working, it placed a substantial additional workload on the Tech Team.

I am very pleased to report that Mark has since built an app that automates the sending of membership renewal notices, avoiding the need for the expensive Brevo upgrade. The Tech Team is still required to initiate the process at the end of each month, after which the notices are sent automatically. The revised



process will continue to be monitored to ensure renewal notices, imports and member records remain reliable.

Conference motions.

The Tech Team acknowledges the concerns raised through the conference motion regarding recurring payments. Recurring payments have been on the Tech Team's project list for some time. The recurring payment option has been revisited and tested numerous times to determine whether it is working correctly; however, the underlying technical glitch has not yet been resolved. We are hopeful that the new system upgrade will overcome the compatibility problem and allow this project to progress.

It is also important to clarify that, during the temporary disruption to Brevo renewal notices, Branches were not required to manually upload membership information. That work was undertaken by the Tech Team. There may have been some confusion experienced by Branches as this issue should not have placed any pressure on Branch volunteers.

The Tech Team supports revisiting recurring payments and recognises the benefits they could provide. Any future implementation will require careful development, testing and communication to ensure it works reliably for members, Branches and Councils.

The Tech Team also notes Motion S09 from Eastern Districts Branch. Several of the functions requested are already available through the current system. Online memberships are rolling memberships and provide each member with a full 12 months of membership from the date of joining or renewing. Because the membership is not limited to the remainder of a calendar year, a pro-rata fee is not required. Automated renewal reminders are sent with links that allow members to log in and pay online.

Manual memberships are the small exception. These are generally held by older members who do not access online services. They remain aligned with the calendar membership year, and Branches should follow those members up before the end of the year to ensure they receive a full 12 months of membership.

The Tech Team does not support providing Branch executives with direct access to the national membership database. Broader access would increase the security and privacy risk and would create a considerable additional workload in training users, maintaining accounts and removing access when office bearers change. Each State has at least two authorised people who can access the database and provide Branches with current membership information. The more appropriate focus may therefore be on ensuring Branches know who to contact and that membership information is provided in a timely and consistent way.

Meeting with Mark from Enrega and the next stage of development.

The Tech Team met with Mark from Enrega on 21 July to review the outstanding project list and discuss the future development of the website and database. This was a very positive and encouraging meeting.

Mark advised us that work will commence next week on an upgrade to the website's operating system. This is an important first step. The current system and compatibility issues have limited a number of projects, and the upgrade is expected to provide greater capacity to revisit and progress many of them.

Many of these projects had originally been scheduled for work in February. However, the unexpected Brevo changes and the considerable work required to keep membership renewal notices operating took priority and filled the development time that had been set aside. With the Brevo solution now in place, attention can return to the outstanding project list.



The upgrade does not mean every project has already been approved or scheduled, but it gives us a much stronger platform from which to assess priorities, costs and realistic timeframes.

Projects being explored.

The project sheet includes several practical and exciting improvements. These include PDF invoices attached to confirmation emails; clearer handling of residential and postal addresses; more visible donation options; gift memberships; an improved membership renewal landing page that encourages members to update their information; member-only pages and protected documents; improvements to the positions and executive information held in the database; and, importantly, another review of recurring membership payments.

Some of these projects will require further discussion and technical investigation. They will need to be prioritised according to member benefit, operational need, cost and the capacity of both the Tech Team and Enrega. Nevertheless, the planned upgrade has given us a positive pathway forward after a period in which technical limitations prevented several projects from progressing.

Acknowledgements.

I would like to acknowledge the members of the Tech Team, Nikki Macqueen, Kym Ross, Tammie Irons and Kate Thompson, the website and membership teams and Brevo representatives across all councils. The work is detailed, ongoing and often unseen. I particularly acknowledge Kym and Nikki who managed the daily Brevo imports while the automation was unavailable, as well as those supporting conference websites, training, manual memberships and database administration.

I also thank Mark and Enrega for their continued response to technical faults and security matters, for developing the Brevo solution and for working with us on the next stage of development.

The year has certainly presented challenges, but it has also demonstrated the importance of strong systems, good security practices and cooperation across all levels of ICPA. We now have an encouraging opportunity to build on the work already completed and to develop a website and membership system that continues to meet the changing needs of our members, Branches and Councils.

Finally, on a personal note, this will be my last conference report as Database Manager and Tech team Chair. I had planned to step down from the role at this Conference; however, with the outstanding projects now ready to move forward, I have decided to continue supporting the Tech Team for the next few months. This will allow me to assist with the work commencing this week and help provide continuity as these important projects are progressed.