

# Exchange Club Board Meeting Summary

## Website Migration, Events, Sponsors & Payments

*Meeting Date: March 4, 2026*

### Executive Summary

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The Exchange Club Board convened to review a prototype website built on the Wild Apricot platform (internally called "Epcot") and to receive an update on Handbook advertising sales. The demo covered a broad range of functionality including member registration, event ticketing with QR check-in, a merchandise store, tiered sponsor directory, donation tools, and a members-only area. The board voted unanimously to adopt Wild Apricot as the club's new website platform, citing significant cost savings — approximately one-fifth of current spend, or roughly \$3,000–\$3,500 per year — and greater flexibility.

On the advertising front, sales are tracking well ahead of last year with 85 contracts signed, approximately 75% paid, and roughly \$49,000 collected. The team expects 5–7 additional contracts within the next 10 days. Key deadlines include a public end-of-March close, an internal goal of April 15, and a hard deadline of end of April, with artwork going to the printer in mid-May.

Migration to the new platform is targeted for approximately three weeks, pending member data import, content porting, and configuration of forms, payments, and event workflows.

### Key Points

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#### Wild Apricot Website Prototype

- A prototype ("Epcot") was demonstrated, focusing on capabilities rather than final design.
- The homepage features the club mission, "Leadership, Service, Local Impact," along with About content, donation CTAs, 2025 local impact stats, the four pillars (Americanism, Community Service, Youth Programs, Child Abuse Prevention), upcoming events, Speaker Spotlight, Fallen Hero Spotlight, and sponsor highlights.
- The Board of Directors page auto-populates from a group membership list, reducing manual maintenance and errors.
- Strategic programs (Angel Oak Award, Foundation, Grants, Scholarships) are consolidated; naming standardized to "Angel Oak Award."
- Speaker Spotlight and Fallen Heroes content organized under a News section.
- A members-only area provides access to meeting minutes, leadership directory, and member search by role.
- The site is fully mobile-responsive.

#### Events, Registration & Check-In

- Events display in calendar and list views with full details (date, time, location, ticket types/costs).
- Member pricing activates after login or Google sign-in; registration pre-fills from member profiles.
- Add-ons (e.g., mulligans for golf events) are purchasable at checkout, with a dynamic cost total.
- Confirmation emails include a QR code; volunteers use an admin app to scan codes for check-in.
- Special events (e.g., Angel Oak Award Banquet) can be featured on the homepage months in advance.
- Members can cancel registrations; modification capability and cutoff policies (e.g., 5:00 p.m.) need further configuration.

## Merchandise Store

- Store supports items (acorns, golf balls, hats, t-shirts, polos) with up to six thumbnail images, regular and member pricing, cart, and checkout.
- Payment processing is not yet integrated.
- Pricing target is approximately \$20 per hat/shirt; a local vendor is available; feasible volumes estimated at 150 shirts and 50 hats per year.

## Sponsors & Advertising

- Sponsors are treated as "members" for licensing purposes, which affects the membership tier and cost.
- A sponsor directory includes logos, names, categories, and website links, with filtering and search by service category.
- Proposed tiered levels: Platinum, Gold, and Bronze — featuring top-tier sponsors prominently.
- The board discussed whether to include all handbook advertisers or only curated featured sponsors; workload estimated at 50–100 hours annually to ingest ads.
- Monetization ideas discussed: premium-priced featured sponsors, QR codes at events linking to sponsor pages, and limited premium directory page auctions.
- A strategy to temporarily increase membership tier during high-traffic event months and deactivate afterward can help manage licensing costs.

## Handbook Ad Sales Update

- 85 contracts signed; approximately 75% paid; approximately \$49,000 collected.
- Contract count is roughly double compared to the same point last year (~40).
- Fewer rejections this year; some advertisers have returned; three new clients from last year were lost.
- Pipeline: 5–7 new contracts expected within 10 days; multiple calls required to close some prospects.
- Deadlines: public close end of March; internal goal April 15; hard deadline end of April.
- Final contracts and artwork sent to Carrie for layout; printer target is mid-May.

- Digital-only advertisers show fewer objections; website searchability expected to aid future pitches.

## Membership, Donations & Payments

- Join page outlines benefits and membership levels (six-month, nine-month, at-large, full) with online payment; connects to QuickBooks.
- Donations supported online, by check, and via corporate matching; an IRA RMD donation option was requested.
- Members can view balances, invoices, and donation records and download PDF copies for tax purposes.
- Concern raised about ~3% credit card processing fees; alternative payment methods (Zelle, Cash App, PayPal, Venmo) are under consideration due to check theft concerns.

## Platform Decision & Migration

- The board voted unanimously to adopt Wild Apricot; no opposition.
- Cost savings estimated at approximately one-fifth of current spend, or \$3,000–\$3,500 per year.
- Migration timeline: approximately three weeks; tasks include member data import, field creation, data mapping, content porting, and file backup.
- Old website license expires end of April; contract details and data backup must be secured before notifying the vendor.
- Online help guides and a handbook how-to section will be developed to support member transition.

## Questions with Answers

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### **Q: Can special events like the Angel Oak Award Banquet be highlighted on the homepage months in advance?**

A: Yes. A homepage widget can feature a specific upcoming event well in advance, while general events auto-populate dynamically.

### **Q: Can members modify their registrations — for example, to add a guest or change agenda items?**

A: Cancellations are currently supported. The ability to add attendees or modify details requires further investigation and configuration. A registration cutoff time (e.g., 5:00 p.m.) can be set to reduce last-minute changes.

### **Q: Should the sponsor directory include all handbook advertisers, or only featured/curated sponsors?**

A: This decision was deferred. Options include all advertisers, tiered featured sponsors, or a hybrid model. Workload for ingesting all handbook ads is estimated at 50–100 hours annually, so resources must be considered.

### **Q: How can the club manage the cost of counting sponsors as "members" in the licensing tier?**

A: One strategy is to temporarily increase the member tier during months with large events and deactivate afterward to manage costs while accommodating peak capacity.

**Q: Is there a mobile app for members?**

A: Wild Apricot does have a member app, but it was not connected to the trial site. The website is fully mobile-friendly. App availability and integration will be reviewed.

**Q: Can we avoid the ~3% credit card processing fees?**

A: No decision was made. Alternative payment methods (Zelle, Cash App, PayPal, Venmo) were discussed as options, given concerns about check theft. Compatibility with the Wild Apricot platform must be verified.

**Q: How are grants and scholarship applications currently handled, and can this improve?**

A: Currently applicants download a PDF, fill it out, and send it in. The board agreed to implement online fillable forms (e.g., Google Forms) and create a centralized Documents/Forms section on the site.

**Q: When does the current website contract expire, and how much notice is needed?**

A: The old site license ends at the end of April. The amount of required advance notice is unclear. The action item is to confirm the contract details and ensure data backups are complete before notifying the vendor.

**Q: What is the merchandise pricing strategy?**

A: The target is approximately \$20 per hat or shirt to ensure an adequate margin. A local vendor is available and past experience shows feasible volumes of roughly 150 shirts and 50 hats per year.

**Q: Can members donate from an IRA Required Minimum Distribution (RMD)?**

A: This option was requested and will be added to the Donate page.

## Action Items / Next Steps

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### Handbook Ad Sales

- Sales team to continue follow-ups and aim to close 5–7 additional contracts within 10 days.
- Maintain public messaging that the deadline is end of March; manage limited extensions into mid-April if needed.
- Continue sending final contracts and artwork to Carrie for layout; target printer delivery by mid-May.

### Website Content & Design

- Prepare photos and content for the four pillars and homepage slideshow; initiate club-wide photo collection.
- Standardize naming to "Angel Oak Award" across the entire site.
- Explore and implement a homepage widget to highlight the Angel Oak Award Banquet months in advance.
- Demonstrate email templates functionality at a future session.

## Sponsors & Directory

- Define sponsor tier criteria (Platinum/Gold/Bronze), benefits, filtering rules, and pricing.
- Assess feasibility and identify resources for ingesting handbook advertisers into the directory (50–100 hours estimated).
- Plan QR code strategy linking to sponsor pages for use at events.
- Review Wild Apricot licensing tiers and costs for temporary member count increases during large events.

## Events & Registration

- Define and implement event change/cancellation cutoff policy (e.g., 5:00 p.m.).
- Add registration fields for agenda items and guest additions.
- Investigate whether registrations can be modified to add attendees after initial signup.
- Enable admin app permissions and QR check-in workflow for large events.

## Store & Payments

- Configure store items (t-shirts, hats, golf balls, etc.) with member pricing and thumbnail images.
- Integrate payment processing for the store and donation pages.
- Add IRA RMD donation option to the Donate page.
- Verify feasibility and security of alternative payment methods (Zelle, Cash App, PayPal, Venmo) with the Wild Apricot platform.

## Forms & Documents

- Create and embed online forms (e.g., Google Forms) for grants, scholarships, and directory applications.
- Set up a "Documents/Forms" section with downloadable and fillable PDFs.

## Migration & Transition

- Import existing member data; define required fields and data manipulation/mapping steps.
- Back up all files from the current website and plan content migration.
- Confirm old website license expiration date and payment schedule.
- Plan vendor termination notice timing to ensure data is secured before communicating.
- Develop a desktop navigation guide and online how-to resources for members.
- Include a how-to guide in the club handbook.
- Review Wild Apricot member app availability and potential integration.