Catholic Charities, Diocese of Venice, Inc.
(Venice, FL)

Your Information

- **Consultation Date**
  - 4/11/18
  - New info per client (5/14/18); approved (5/18/18)
- **Timeline**
  - 8/31/18
    - Busy time
      - Fall
      - Fundraising
      - Weather
- **Organization Name**
  (Full name as you would like it to officially appear.)
  - **Catholic Charities, Diocese of Venice, Inc.**
- **Do you prefer to go by**
  - Other
    - Non-profit organization
- **Organization Information**
  - Phone Number (Primary)
    - (941) 488-5581
  - Physical Address
    - Central office and main leadership is at the Diocese of Venice building
      - Catholic Charities, Diocese of Venice, Inc.
        1000 Pinebrook Road
        Venice, FL 34285
  - Postal Address (if different)
    - Catholic Charities, Diocese of Venice, Inc.
      PO Box 2116
      Venice, FL 34284-2116
  - Your Time Zone
    - Eastern (EST)
- **Full Name of Pastor(s) and preferred salutation**
  - N/A
- **Web Development Committee**
  (Please list all members that will be present for the consultation and anyone else to be involved.)
  - **Primary Contact(s)**
    - **Judy Bokorney**
      - Communications Manager | Sarasota

- Catholic Charities, Diocese of Venice, Inc.
- judyb@catholiccharitiesdov.org
- (941) 921-2829
  - o Additional Members
    - ▪ **Monica Mattioli**
      - Director of Development
      - mmattioli@ccdis1.org
      - (941) 355-4680 x 302
        - o Previously at: https://www.ccwny.org/
    - ▪ **Nikki Cole**
      - Assistant Director of Development
      - nmuth@ccdis1.org
      - (941) 355-4680 x301
        - o Previously at: https://www.tufts.edu/
- **New Website is for**
  - o Organization only
- **Final Website Address**
  - o **www.catholiccharitiesdov.org**
- **Current Website Address**
  - o **www.catholiccharitiesdov.org**
    - ▪ Login Link: Via FTP (see hosting info below)
- **Please list all other website addresses we need to be aware of that are associated with your organization. This is only for any content needing to be included (migrated) to the new site.**
  (Examples include: sub-domains, missions, groups such as Knights of Columbus or Youth Ministry, etc.)
  - o None to include or migrate
  - o But, associated with
    - ▪ Catholic Charities Foundation
      - http://www.ccfdnswfl.org/
    - ▪ Diocese of Venice, FL
      - https://dioceseofvenice.org/
- **Current Website Format**
  - o PHP/HTML
- **Are you part of a Cluster or Church Merger?**
  - o N/A

Domain and Email Management

- **Hosting** (Required)
  - o All of our sites are hosted on a secure platform for only $25 per month (billed annually at $300 per year).
    - ▪ Includes
      - Free domain name registration or transfer
      - Server maintenance and security
      - Client support (phone and email)
      - And more

- ▪ We agree for Diocesan to host our new website(s).
  - **Yes**
- **Email Setup and Management** (Optional)
  (Choose one)
  - o No
    - ▪ Already Google
  - o Additional
    - ▪ We currently only have my email address at our domain name but would like to discuss adding more staff to the domain name.
- **Domain Name** (Optional)
  - o **Are you interested in a new website address (domain name)?**
    - ▪ No
  - o **Management of Website Domain Name** (Not required)
    (Choose one)
    - ▪ Yes, but just paid for the next five years with Network Solutions
      - Move to us soon, though
      - www.networksolutions.com
        - o u: JudyBokorney
        - o p: C@tholicCh@rities
    - ▪ Although connected with the Diocese, they are a separate entity. Hence, Judy can approve moving domain management to us.
  - o **Current Hosting Company Info**
    - ▪ In some cases, your website(s) may be 'hosted' by a different company (Hostgator, Godaddy, etc.) from the one(s) managing your domain name(s). If so, please provide the following:
      - http://www.dotster.com/
      - ftp.dotster.com/
        - o u: judyccdov
        - o p: ccdov.1234
- **Current Technical Support Contact**
  - o Berry Infocom
    - ▪ Dave Berry
      - dhberry@hotmail.com
      - (941) 925-0061
      - (941) 544-4923

Additional Communication Components Through Diocesan

- **Church Bulletin**
  - o **Are you a Diocesan Bulletin subscriber?**
    - ▪ N/A
- **Mobile Phone App**
  - o **Are you a Diocesan "myParish App" subscriber?**
    Free to our bulletin subscribers, please visit http://myparishapp.com/parishes for more information.
    - ▪ No

- **Church Management Software**
  - o **Are you a Diocesan Publications "PDS Software" client (Parish Data Systems)?**
    - ▪ No

Help Us Get to Know You

- **New Website Thoughts and Interests**
  - o Why are you interested in a new website and what are you looking to accomplish with it?
    - ▪ We need an updated look for our site with a contemporary and clean style.
    - ▪ We need our web site to have navigation that showcases all the services in all the locations.
  - o What do you want to improve on your current website?
    - ▪ Ease of navigation, especially with finding
      - Programs and services
      - Events
      - Contact information
    - ▪ Locations
  - o What areas and/or categories are you expecting to **use** the most (from an administration side)?
    - ▪ Programs and services
    - ▪ Events
    - ▪ Giving
    - ▪ Contact information
    - ▪ Volunteers
    - ▪ Locations
  - o What areas and/or categories are you expecting to be **viewed** the most (from the point of the user)?
    - ▪ Same as above.
  - o Describe the identity of your organization (personality, purpose, etc.)?
    - ▪ Catholic Charities is a mission-driven organization that works to move people in need in Southwest Florida toward self- sufficiency.
    - ▪ Catholic Charities also strives to be a good steward of the donations and funding received.
    - ▪ The agency works to operate efficient and effective programs.
  - o What is unique about your parish or organization?
    - ▪ Catholic Charities, Diocese of Venice, Inc. encompasses 10 counties in 10,000 square miles in Southwest Florida.
      - We have 32 office locations in 17 cities.
      - We need our web site to have navigation that showcases all the services in all the locations.
      - We also host 11 fundraising events to support these services.
        - o These events are held in several cities and all need to be forefront on our web site during a three-month period when 9 of the 11 events are being held.
  - o What attracts an audience to you?
    - ▪ Either the need for assistance, or the desire to support the agency through attending an event, donations, or volunteering.
  - o Describe your audience... (demographics, etc.)
    - ▪ Two-fold
      - A client base of mostly low-income level persons of all ages.
      - A donor/supporter base of mostly middle-age professional persons.

- For Parishes, what is the size of your congregation? (Number of families.)
  - N/A
- What is your focus and/or mission?
  - Catholic Charities serves all in need regardless of race, nationality or creed and moves people toward self-sufficiency.
- Is the site more for current members and staff, or are you more evangelistic?
  - Our web site is for people in need of our services and people who want to support our organization.
- Do you have a tagline, and if so, what is it?
  - "Providing Help. Creating Hope. Serving All."
- Content migration… how much and type of content to move to the new website?
  (Please choose one; these are rough figures only.)
  - All
    - But client okay helping out on some
  - Employee Forms Link (internal, private area)
    - Catholic Charities Employee Forms page
      - http://catholiccharitiesdov.org/employee_forms/index.html
    - How to best accomplish?
- Diocesan Bulletin Salesperson
  - N/A
- How did you first hear about **Diocesan** (previously known as **Diocesan Publications** and **Trinity Publications**)?
  - You were recommended by the Diocese of Venice, Inc. ☺

Thoughts for Website Design and Layout

- **Design**
  - **Are you interested in a new logo?**
    - No
    - Branding guidelines in client folder
  - **Logo and/or Organization Branding (Colors)**
    - Current Colors
      - Color 1 (Primary)
        - Purple (RGB: 92, 64, 153)
      - Color 2
        - Teal (RGB: 0, 119, 139)
      - Color 3
        - We have also used white, grey, and black on our web site as well.
        - But the above colors are the official colors.
    - Color use
      - Purple first
      - Teal secondary
  - Additional thoughts and dialogue will take place between our web designer and your organization during the next stage of the project, the Design Phase.
- **Layout and Structure**
  - **News Area**
    - Primary

- "News and Info"
  - Secondary
    - Catholic Charities Newsletter (PDF)
      - By Season
    - Catholic Charities E-News
      - By Season
- **Events Area**
  - Primary
    - "Upcoming Events" or just "Events"
  - Secondary
    - To come, work with Judy
- **Site Nav**
  - To group into fewer categories and use in a mega menu
    - Example, but change/customize actual wording (https://www.cc-nh.org/):
      - Who We Are, How E Help, How You Can Help, Media Center
    - Site Nav as provided by Judy:
      - Home
      - About Us
      - Locations
      - Services
      - News
      - Events
      - Donate
      - How You Can Help
      - Volunteer
      - Contact Us
  - Challenge
    - How to showcase multiple categories, programs, services, etc. in the multiple levels of navigation (child, grandchild levels); combined with the multiple physical locations
    - Similar to multiple ministries of St. Brigid (Johns Creek, GA), but how to include within the mega menu or drop down options?
- **Homilies**
  - No
- **Important Secondary or Third Party Links**
  (Please add to, modify, delete the following as needed.)
    - Catholic Charities USA
      - https://catholiccharitiesusa.org/
    - Catholic Charities Foundation Diocese of Venice, FL
      - http://www.ccfdnswfl.org/
    - Donate Car
      - http://catholiccharitiesdov.careasy.org/HOME.html
    - Profiles
      - Charity Navigator Profile
        - https://www.charitynavigator.org/index.cfm?bay=search.summary&orgid=5925#.U44m2yg1D9t

- Guidestar Profile for Catholic Charities of Venice
  - https://www.guidestar.org/profile/65-0889322
  - Giving Partner Profile
    - http://thegivingpartner.guidestar.org/NonprofitProfile.aspx?OrgId=1120152
- Council on Accreditation
  - http://coanet.org/home/
- Probably a few more…

- **Automated Content**
  (Your new site may dynamically showcase the following content that is vital to keeping the faith. Please state the automatic feeds to include and preference on how to display.)
  - N/A
- **Online Giving**
  - To confirm
    - Yes (already have)
      - https://catholiccharitiesdov.weshareonline.org/index.aspx
      - http://catholiccharitiesdov.org/donate/index.html
    - But, need to connect with Events / Tickets
      - 11 fundraisers / event types
        - Connect with different "buckets" within Vanco
        - See examples under Notes at end
- **Social Media**
  - Build
    - Use Flow-Flow plugin
      - Incorporate all social media feeds just like home page (https://dioceseofvenice.org)
        - Able to manage, turn/off duplicate posts (Facebook, Twitter, etc) within dashboard?
  - Links
    - Facebook
      - https://www.facebook.com/CatholicCharitiesDioceseOfVenice
    - Twitter
      - https://twitter.com/CC_DOV
    - YouTube / Video Channel
      - https://www.youtube.com/user/CCDOV
    - Instagram
      - https://www.instagram.com/catholiccharities_dov/
- **Staff Directory**
  - Simple (Included)
    - We're shy and displaying the standard contact information with NO staff photos at this time is fine.
- **Image Gallery**
  - Standard (Included)
    - Includes one "Album" comprised of 2-3 image "Galleries".
    - Upon training, you will be able to create as many albums and galleries as needed.
- **Bulletins Page**
  - N/A

Thoughts for Website Development

- **Multilingual Option (Automatic Language Translation)**
  - o Yes (please choose your preferred languages)
    - Creole
    - French
    - Haitian (if not covered under Creole already)
    - Polish
    - Russian
    - Spanish
    - Ukrainian
- **Website Calendar(s)**
  - o **Current Calendar(s)**
    - Our organization currently uses the following calendars (i.e. "Events Calendar")
      - None, do not want to use an actual calendar ("Would look too empty during certain times of the year.")
  - o **Google Calendar**
    - No, not interested
- **E-Newsletter Integration**
  - o Constant Contact
    - https://visitor.constantcontact.com/manage/optin?v=001gefDXOImcDsztZFjRO0Sh82ewlZHoT7BFie2zT6AsjYS6UcLNeGk0h5vJ7cYZtofd5prNIk-UARaYGexE2P9GH1vi1w_niTt
    - Current
      - http://catholiccharitiesdov.org/news/e-news/index.html
    - Archive
      - http://catholiccharitiesdov.org/news/archives/index.html
    - Example
      - http://myemail.constantcontact.com/Spring-News.html?soid=1101975160565&aid=9lmNB6Rq5xY
- **Site Administration**
  - o Approximately how many people need to be trained on the new website?
    - 3- 5
  - o Website Admin Access
    - Please list all **Full Access** users here:
      - Judy Bokorney
        - o judyb@catholiccharitiesdov.org
      - Monica Mattioli
        - o mmattioli@ccdis1.org
      - Nikki Cole
        - o nmuth@ccdis1.org
    - Are there any admin users needing **Limited** or **Special Access** (i.e. Mary Smith for the Faith Formation category only)?
      - TBD, not sure at this time
  - o Contact / Registration Forms
    - Contact Us

- Primary Contact form to be customized
  - Dropdown option to choose
    - Location
    - Office and/or Service
    - Staff
  - Examples
    - https://www.ccwny.org/contact-us
    - https://dioceseofvenice.org/contact/
- Will you need additional, custom forms?
  - Yes
    - Possibly a Volunteer Form and others
  - Client wants to create forms internally
    - For event, registration and ticketing options
    - Best option: Gravity Forms that connect to online merchant
- "Official" email address to use throughout the website (e.g. contact form, footer, contact page, etc.)
  - New, to come
    - info@catholiccharitiesdov.org
- **Other Websites and Ideas**
  (Please view our gallery at www.diocesan.com/web/website-design or list any others you like.)
  - We really like the following:
    - **Tufs University**
      - https://www.tufts.edu/
        - We like the full-screen look of this without a large photo that spreads through the whole screen.
        - We like the clean look and organization of the home page.
    - **Catholic Charities of Buffalo, New York**
      - https://www.ccwny.org/
        - We like the navigation categories of this site but not the boxed in look of the design.
    - **Catholic Charities of St. Paul and Minneapolis, MN**
      - https://www.cctwincities.org/
        - We like the clean look of this site
          - and it does have a good way of organizing programsand services with the Find Help button right at the top.
        - Lots of sub organizations, content
        - Less wide on the slider photo
          - Large, but more realistic in not going full edge-to-edge
          - Monica and Nikki prefer not using full width images
    - **Catholic Charities of New Hampshire (Manchester, NH)**
      - https://www.cc-nh.org/
        - We like the navigation drop down menu on this site.
        - If this style is used maybe we can have less major navigation categories because everything is visible at once, but the site still has a clean look.
          - Yes, use a mega-menu idea like this

- Other Examples
  - Client is under the larger organization of Catholic Charities USA
    - https://catholiccharitiesusa.org/
    - Great design
- **Notes**
  - Additional thoughts, options, ideas here…
    - Various
      - We do not want our web site to look to busy and we do not want really large images.
      - Diocese of Venice is youngest in state of Florida
      - New CEO starting week of April 16th
    - Users of the website
      - Client-based: need help (physically, resources, etc.)
      - Donor-based: want to support organization
    - Include SEO and full analytics
    - Content Migration
      - Private Area, "Employee Forms" page
        - Currently has hundreds of forms and content, brochures, files, etc.
        - To keep linking with current/new site
          - Brochures
          - Newsletters
          - Employee forms
      - News and Archive
        - Goes back to 2009ish
        - TBD how far back to include
    - Content Development
      - Hierarchy of Content
        - Events
        - Services
        - Locations
        - Support
          - Financial
            - Donate
            - Appeals
            - Capital Campaigns
            - Etc.
          - Volunteering
        - News, etc.
      - Multiple "Programs and Services" combined with multiple "Service Locations"
        - All equally important
        - How to easily
          - Showcase all
          - Find all
        - Examples
          - https://www.cctwincities.org/all-services/

- Go by category
  - https://www.cctwincities.org/locations/
    - Will need to go by physical location (counties)
  - o Modify "Find a Parish" feature from other Diocese websites
    - Use most recent one, Diocese of Venice
      - https://dioceseofvenice.org/find-a-parish/
    - Kyle to retool to allow for customized categories and manual input
- Maps
  - o Primary
    - Show all office locations at once on a map with pins, custom location markers, etc.
  - o Individual
    - Include maps on locations, offices and services pages
      - Similar to Find a Parish
      - Options
        - o Services Tab
        - o Locations Tab
          - By County
          - Show Services within County
          - Should be enough to just stop at county, and not go further by city
- Site Navigation
  - o Client needs help with organizing full site navigation and content
  - o Mega Menu
    - Especially for
      - Services
      - Locations
      - Events
        - o Event Season(s)
    - Judy wants to be able constantly edit/update the menu – especially for changing the Events and current Event Season
    - Use thumbnail images and icons within mega menu
- Client is getting rid of Click and Give (Amazon program/links)
  - o But will still have a "Wishlist" page
- Featured Items
  - o Current "Featured Items" and icons (Newsletter to Like Us, etc.)
    - Most likely all changing with new layout and options
  - o Do a lot with/for Immigration Services
    - Be sure to highlight, make a top category
- Newsletters
  - o Integrate with Constant Contact (sign-up option)
    - Include
      - Email
      - Employee
    - Ideas

- https://wptavern.com/constant-contact-releases-official-plugin-for-wordpress
  - o Official plugin
- https://wordpress.org/plugins/gravity-forms-constant-contact/
- https://wordpress.org/plugins/constant-contact-api/
  - o Includes event marketing. But no, bad reviews

- Judy to send the following
  - Branding
    - o In client folder
  - Employee links/forms (private)
    - o http://catholiccharitiesdov.org/employee_forms/index.html
  - Giving, tickets forms (examples, software)
    - o A set of links to some Catholic Charities appeals and event pages from this past year:
      - Summer Appeal
        - https://dioceseofvenice.cincyregister.com/summertimegiving2017
      - Christmas Appeal
        - https://dioceseofvenice.cincyregister.com/christmas2017
      - Catholic Charities Ball
        - https://ccdov.ejoinme.org/CCBall2018
      - Mardi Gras Madness
        - https://ccdov.ejoinme.org/2018MardiGras
      - Wine Tasting
        - https://ccdov.ejoinme.org/OMH2018WT
      - Venetian Charity Ball
        - https://ccdov.ejoinme.org/VenetianBall2018
      - Boots and Bandannas
        - https://dioceseofvenice.cincyregister.com/bootsandbandannas2018
      - Teach a Man to Fish Gala
        - https://dioceseofvenice.cincyregister.com/fish2018
      - Emerald Ball
        - https://cccollierc.ejoinme.org/EmeraldBall2018
- Training
  - Will need extra time to train on custom form creation (building a form connected with registration and ticketing, per examples above).
- Challenges
  - How to present information for an organization that covers:
    - o 10 counties
    - o 10,000 square miles
    - o 32 offices in 17 cities
  - Ticketing forms and event registration w/ Vanco Payments
    - o Ideas
      - https://osostudio.com/blog/event-registration-gravity-forms/
      - https://eventespresso.com/pricing/?ee_ver=ee4
        - https://eventespresso.com/add-ons/
      - https://eventespresso.com/pricing/?ee_ver=ee3

- For recurring events use Event Espresso 3
  - Or, able to simply use Gravity Forms and connect directly with customized portal/registration through Vanco (http://connect.vancopayments.com/hosted-online-giving)?
- Members Only Area (employee link/forms)
  - Internal category/area viewable by employees only
  - Ideas
    - https://herothemes.com/blog/restricting-access-wordpress-pages-creating-members-area/
      - Customize functions file for user role
      - Add Advanced Custom Fields to bring articles into page
      - Other Membership plugins
    - https://barn2.co.uk/kb/create-private-wordpress-categories/