

Notebook

WSJ Society
WSJSociety.com Website Design

Revision
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Statement of Purpose

To be very clear, the WSJ Society is very fortunate to have had the support of Johnson Controls in the creation and maintenance of WSJSociety.com.

The site was created in the summer of 2013. A project team was created by Kim Metcalf-Kupres with Karen Sommer as project leader. both of Johnson Controls. Paul Froehling, Greg Pascucci, and Jude Anders of the WSJ Society provided client input. Javier Centeno of McDill Design created the website and continues to provide support as required.

The website has served the membership since 2013 with current registrations reaching 40% of the membership. Use of the site has been a learning experience. Many features were included in the initial design, some worked well others have had very limited use. It's time to evaluate the website, its use, and potential improvements.

As part of the overall Project: WSJSociety.com Update, this notebook will capture the website design and identify modifications for improved service to members. There are four phases of this work:

1. Review & Assess the current design and its performance
2. Test & Learn modification trials as driven by WSJ Society Business Model
3. Implementation of those features & function with proven fit to member interests
4. Continuous Improvement process & resource implementation.

WSJSociety.com Current Design

Structure & Support

WordPress

WSJSociety.com is built on the WordPress platform. WordPress is a well established open source software package for the creation of websites, blogs, and apps. The software is maintained by WordPress.org. More detailed information can be found on their documentation page: [WordPress Codex](#).

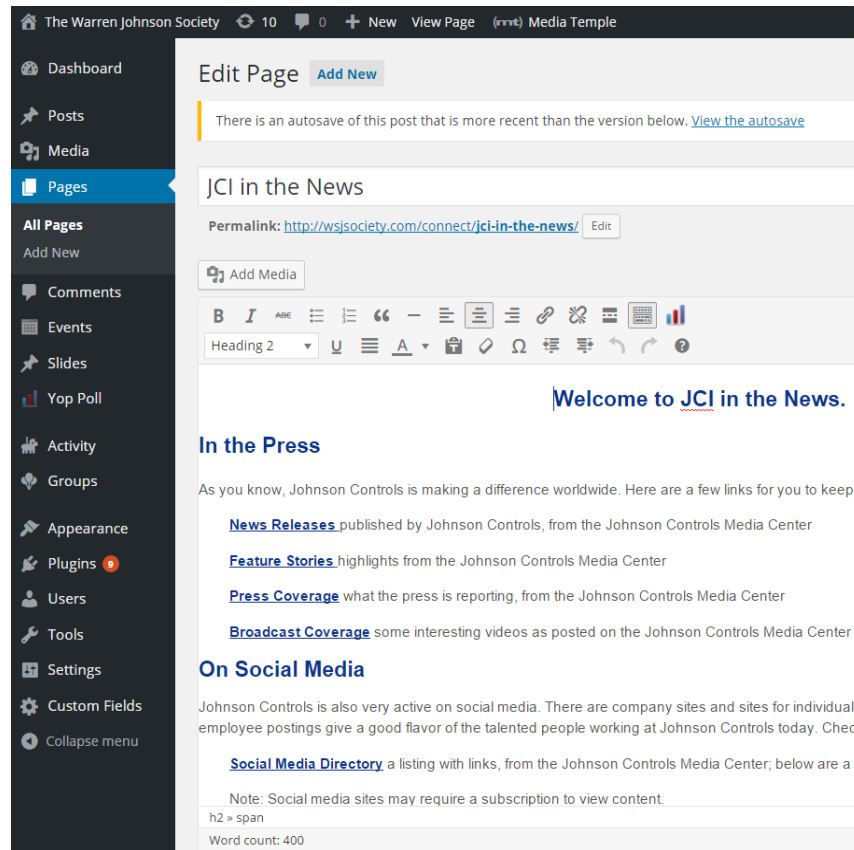
Theme

WordPress websites use themes to provide users with a feature set they can apply to their needs while not requiring expertise in coding for web pages.

WSJSociety.com is built on a custom theme, "The Warren S Johnson Society," that was created by McDill Design for our application.

WordPress supports theme updates with themes provided by their community. However, making changes to the theme would require re-engaging McDill Design. Our intent at this point is to explore improvements and updates that are within the skill set available to the society. Finding those improvements we can make, while not altering the theme, will be part of the challenge for this project.

Managing a WordPress website is done through the Dashboard of the platform. Access to the Dashboard requires login and appropriate user level authorization.



WordPress Dashboard, Page Edit Segment

The list in the left column of the Dashboard provides a simple view of the website.

- **Posts** – messages or news items to be published; can be scheduled, assigned a category, given a tag and featured image
- **Media** – a library of images, videos, or PDF files uploaded for publication
- **Pages** – the fixed published content of the website; may be scheduled, assigned to a Parent page, and template for page format, and given a featured image
- **Comments** – applies to blogs – WSJSociety.com does not offer public blog features
- **Events** – scheduling feature for the calendar
- **Slides** – Images for Home page – currently moving slides is not activated
- **Yop Poll** – Editing polling through the Yop Poll plugin
- **Activity** – list of current website activity
- **Groups** – Admin for BuddyPress Groups
- **Appearance** – Admin functions for Theme, Menu, and Widgets
- **Plugins** – Admin functions for managing plugins
- **Users** – Admin functions for managing user information. Users may be assigned

- roles: Subscriber, Contributor, Author, Editor, or Administrator
- **Tools** – A few utility functions
- **Settings** – Setup parameters for platform and plugins
- **Custom Fields** – Theme setup for Home page display

Some of the function in the list are provided by the WordPress platform, others by plugin extensions to the platform. The details are not important at this point. They are presented here to give the reader an idea how WordPress enables website development and maintenance with very limited programming knowledge.

In particular, note in the Dashboard figure that creating the page “JCI in the News” can be done with very simple text editing tools familiar to anyone who has used a word processor. However, it is possible to access the HTML code for that page and enter additional code to achieve a desired effect beyond the template formatting.

Not shown in the figure is the selection of a page template that is used in publishing the information shown in the edit window. *The templates are extensions of the Theme and written in PHP code I think. In any case editing or adding to the templates is currently beyond the skill level of the project team. They are taken as a given for now.*

Part of our challenge in the update project is to make the most of the features currently available to improve service to our members.

Plugins

Features and functions of the basic WordPress platform are expanded by the addition of plugins.

WSJSociety.com Plugins

Name	Function
(mt) Media Temple System	System Plugin for WordPress Hosting Services
Advanced Custom Fields	Visual editing features for WordPress edit screens
BP Gallery(BuddyDev)	Media gallery for BuddyPress powered site - replace w/ MediaPress?
BP Profile Search	Search BuddyPress Members Directory
BuddyPress	Social networking functions
Custom Recent Posts Widget	Creates a widget to display a list of recent posts based on categories or tags. Widget setting for post count, title can be changed.
Enable Media Replace	Enable replacing media files by uploading a new file in the "Edit Media" section of the WordPress Media Library
Events Manager	Event registration and booking management for WordPress i.e. the Events and Volunteer Calendar
Image Widget	A simple image widget to add image widgets to the site
TW Recent Posts Widget	Advanced version of WordPress Recent Posts widget, allowing increased customization to display recent posts from user specified category
Yop Poll Plugin	Enables the creation of user polls on the website
Akismet (N/A)	Spam protection for blog comments/ Not Active
(mt)Mail (N/A)	Media Temple Webmail or GoogleApps mail
Automatic Sign Out for Inactivity (N/A)	After a time period of inactivity, this plugin will log the inactive user out. Note: Plugin not updated in two years
BP Groups Suggest Widget (N/A)	Simple Group suggestion widget based on friends Group Note: Plugin web page no longer available
Sidekick (N/A)	WordPress training videos on Dashboard
WP101 Video Tutorials (N/A)	WordPress video tutorials on the Dashboard
Site Stager (N/A)	Enable developer to stage/sync WordPress sites
BP Labs (N/A)	BuddyPress Experimental plugins NOT TESTED

Note: N/A indicates that the plugin is on the list, but not activated.

Sidebars & Widgets

Widgets can be added to provide special purpose features to the WordPress site. Widgets are applied within Sidebars and Sidebars are incorporated into page templates for display.

The use of WordPress Widgets are discussed in the [Codex: WordPress Widgets](#). With Administrator authority and login, Sidebars and application of widgets can be edited from the Dashboard at: [Appearance/Widgets](#).

WSJSociety.com Sidebars & Widgets

Sidebar	Use, Widgets, & Parameters
General Sidebar	<ul style="list-style-type: none">- Used on most pages including Default page- Image Widget: About WSJ Society/ image, size, align, link
About Sidebar	<ul style="list-style-type: none">- Used on About Page- TW Recent Posts: Latest President's Message/ Category, Order, Count, Display, Read more text
President Message Sidebar	<ul style="list-style-type: none">- Display on President's Message page- Image Widget: About WSJ Society/ image, size, align, link- Custom Recent Posts: President's Message Archive/ Count, Category
Editor Notes Sidebar	<ul style="list-style-type: none">- Used on the Notes from the Editor Page- Custom Recent Posts: Editor Notes Archive/ Count, Category
From the Archives Sidebar	<ul style="list-style-type: none">- Used in From the Archives page i.e. Johnson Controls History archive- Custom Recent Posts: Recent Posts/ Count, Category- Text: Archives/ text including a link
From the Members Sidebar	<ul style="list-style-type: none">- Used on the From the Members page ** Not in use- Custom Recent Posts: Archive/ Count, Category
Newsletter Sidebar	<ul style="list-style-type: none">- Used on the Newsletter page & The Hub- Custom Menu: Quick Connects/ Select menu- Text: WSJ Society Newsletter/ text w/link to Newsletter Archive
Members Only Sidebar	<ul style="list-style-type: none">- Used on all Members Only pages- Image Widget: Events Calendar/ image, size, align, link
News Sidebar	<ul style="list-style-type: none">- Used on the News page- Custom Recent Posts: Recent News/ Count, Category

Note: Modification of content and location of Widgets and Sidebars is beyond the team's current skill level. Information on these is available in the Codex:

Codex: [Sidebars](#)

Codex: [Widgets](#)

Menus

Another element of Appearance for The Warren S Johnson Society Theme are the menus that guide users around the website. According to the Dashboard, the theme supports two menus. However, there are three menus currently defined and used on the website. (Refer to [Codex: Menu](#) for more information.)

WSJSociety.com Menus

Name	Use & Elements
Primary Navigation	<ul style="list-style-type: none">- Used on all pages as drop down from the blue barriers- Home- Learn/About the Society; President's Message; From the Editor; Resources; JCI Archive; JCI Archive Timeline- Connect/ The Hub; News; Photo Gallery; Upcoming Events; JCI in the News; Poll- Members Only/ Benefits-Opportunities; WSJ Society; Member Directory; Events and Volunteer Calendar; Suggestion Box
Top Links	<ul style="list-style-type: none">- There is a name, but no content listed
Newsletter	<ul style="list-style-type: none">- Used on the original Newsletter page - current use in on The Hub and pages related to it; menu is on left sidebar- Elements are: The Hub; News; Photo Gallery; Upcoming Events; JCI in the News; Poll

Page Templates

Page Templates are coded page formats included as extensions to the Theme. *Editing or adding to the templates is currently beyond the skill level of the project team. They are taken as a given for now.*

Given the fixed code, there are actions that can be taken to improve the display of information. For example at the time of the original design, sidebars were a standard feature of web pages. However, they often get in the way of content display. The Section Landing Page template does not have a sidebar. It can be used to replace pages where a sidebar is unwanted.

Also, the current design also has very limited selection of font options. It would be much better to have a larger font for most information. In this case, some local HTML or CSS code could be used to modify the template.

Using templates in new ways or modifying page code will require experimentation. The intent is to develop means to quickly test new ideas for their appeal to users.

WSJSociety.com Page Templates

Name	Features
Default Template	- Page Title at left top - large - General Sidebar top right
About	- Page Title at left top - large - President Message Sicebar top right
Account	- Page Title at left top - large - Change Password & Change Email buttons
BuddyPress - Activity Directory	- Link to Newsfeed
Change Email	- Special function with database access - Don't re-use
Change Password	- Special function with database access - Don't re-use
Email Verification	- Special function with database access - Don't re-use
Enroll	- Special function with database access - Don't re-use
Forgot Password	- Special function with database access - Don't re-use
From the Archives	- Special function with database access - Don't re-use
From the Archives - Archive	- Special function with database access - Don't re-use
Help	- Help email with selection of topic - Title can be modified for other purposes
Home	- Home page with links to login status - Special function - Don't re-use
Identification Email Verification	- Special function with database access - Don't re-use
Login	- Special function with database access - Don't re-use
Login Existing Members	- Special function with database access - Don't re-use
Login Existing Members - Create Password	- Special function with database access - Don't re-use
Logout	- Special function with database access - Don't re-use
Member Benefits	- Page Title at left top - large - General Sidebar top right
Member Email Verification	- Special function with database access - Don't re-use
Member Identification	- Special function with database access - Don't re-use

Name	Features
Member Section	<ul style="list-style-type: none"> - Page Title at left top - large - Members Only Sidebar top right
New Login	<ul style="list-style-type: none"> - Special function with database access - Don't re-use
News	<ul style="list-style-type: none"> - Page Title at left top - large - News story titles and short blurb - all since going live - General Sidebar top right
Newsletter	<ul style="list-style-type: none"> - Newsletter sidebar at left - Not responsive
News Letter President's Message	<ul style="list-style-type: none"> - Newsletter template - Page title with current President's message
Notes from the Editor	<ul style="list-style-type: none"> - Current From the Editor note - Editor Notes sidebar top right
Notes from the Editor - Archive	<ul style="list-style-type: none"> - From the Editor notes - all from going live - General Sidebar top right
President's Message	<ul style="list-style-type: none"> - Current President's Message - General Sidebar top right - President Message Sidebar below General Sidebar
President's Message - Archive	<ul style="list-style-type: none"> - President's Message title & blurb - all since going live - General Sidebar top right
Registration Complete	<ul style="list-style-type: none"> - Blue bar heading as all others have - PRINT & LOGIN buttons - both active
Section Landing Page	<ul style="list-style-type: none"> - Blue bar heading as all others have - Large image field followed by page title - Code to place excerpt over top image - CSS grid - 3 columns identified by <div> ... </div> - Allows whole page display if <div> is not used - Page format is responsive - Applied to The Hub and Front Page with good result 2016/3/28
Sitemap	<ul style="list-style-type: none"> - Page Title at left top - large - Sitemap content - General Sidebar top right
Suggestion Box	<ul style="list-style-type: none"> - Page Title at left top - large - Suggestion Box resources w/email link - Members Only Sidebar top right - May be placed outside the Members Only wall but the sidebar will require a login
Support	<ul style="list-style-type: none"> - Page Title at left top - large ** Not currently used - General Sidebar top right

Name	Features
WSJ Society	<ul style="list-style-type: none"> - View & Edit Profile links with explanation - Specific WSJ Society sidebar top right that is used regularly in the social network features - maybe a standard from BuddyPress
membernote	<ul style="list-style-type: none"> - From the Members page to capture posts with category From the Members - there was only one posted as Stories Worth Repeating
membernote - Archive	<ul style="list-style-type: none"> - Members page listing recent logins by members - This appears to be incorrectly coded - expectation is for a list of all member notes published since going live - except for this error, it looks like membernote was set up to follow the same structure as Notes from the Editor and President's Message

Some templates remain to be evaluated in detail. Not all are currently used and others have a very specific purpose that make them not well suited to modifications of interest here. Detail will be added as we learn more in the Update Project.

All pages have the same heading with logo, login or account information, search box, and below them the blue bar with drop down menu boxes that are driven from the Primary Navigation Menu. And at the bottom of each page is a copyright statement and link to the Sitemap page.

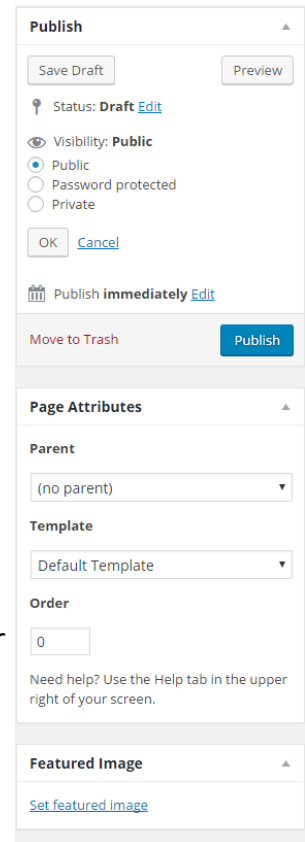
The WordPress Dashboard manages all pages created. They are accessible by:

- List sorted as:
 - All (99)
 - Mine (19)
 - Published (94)
 - Drafts (5)
 - Trash (3)
- Filter by Month & Year
- Search page title & contents

Note: the (#) indicates the count of pages as of February 11, 2016.

As shown in the image cut from the Dashboard, pages can be assigned as public, password protected, or private. They can be held as drafts and published on a schedule or immediately. They have attributes defining a relationship to another page, a parent; be displayed with a specified page template, in an order (?); and, have an image selected for display as the feature image.

Note that the Parent page order is reflected in the Sitemap as a means of managing page hierarchy.



Posts

In addition to information published to a page, WordPress allows publication of a Post. For example, each President's Message is published (posted) to the President Message page. The connection is made by assigning the post to a category, in this case, the category President Message.

The Theme is coded to capture selected posts and make them available in widgets e.g. in the President Message Sidebar. Also selected page templates provide a display of title & blurb of each post in a category e.g. the President's Message – Archive.

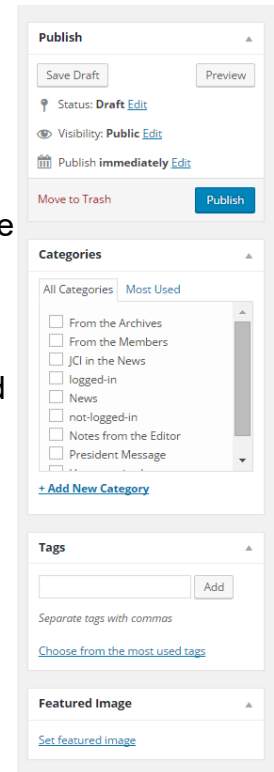
As shown in the image cut from the Dashboard, pages can be assigned as public, password protected, or private. They can be held as drafts and published on a schedule or immediately. In addition to an assigned Category, a post can be given a Tag and assigned a feature image as shown in the screen capture at right.

Also, similar to page editing, posts are created and edited with tools similar to a basic word processor, or by direct modification to HTML code.

Posts are managed through the WordPress Dashboard and accessible via:

- List sorted as:
 - All (306)
 - Mine (114)
 - Published (296)
 - Scheduled (6)
 - Drafts (4)
- Filter by Month & Year
- Filter by Category
- Search post title & contents

Note: the (#) indicates the count of pages as of February 11, 2016.



Categories & Tags

Tags assigned to a post are included in the post's listing line on the Dashboard. **More research is needed on the use of tags. It does not appear that posts can be sorted using them as a key. To date, tags have not been used.**

The list and application of the existing categories is given in the following table>

WSJSociety.com Categories

Name	Application
From the Archives	JCI Archive & JCI Archive Timeline
From the Members	From the Members ** Obsolete, does not archive properly
JCI in the News	JCI in the News ** Trial, **Obsolete did not work
Logged-in	Home page slide selector for logged-in user
News	News posts - Note that this has the archive format, listing all posts
Not-logged-in	Home page slide selector for user not logged-in
Notes from the Editor	Notes from the Editor & Notes from the Editor Archive
President Message	President's Message & President's Message Archive
Uncategorized	None selected, used for drafts

Media Library & BP Gallery

WordPress includes a Media library of photos, PDF documents, Audio & Video files that can be used in pages and posts. The Media Library is also the source of images for the plugin BP Gallery.

Note there are a number of issues with BP Gallery requiring investigation and correction:

- Only photos are enabled in the BP Gallery settings, not Audio or Video
- Per the plugin website, [BP Gallery](#) is not supported, [MediaPress](#) is
- There is also an error message that appears to be generated by BP Gallery that has been there without an apparent problem other than the message since going live.
- The size setting for Large image in BP Gallery (600×600) is different from that set in Dashboard/Media where Large is (1024×1024)

The Media Library can get large. There are currently 770 items. They can be filtered by Month and Year, images (eliminates PDF files) and those unattached. The database can also be searched by file name content.

Note: There is currently no standard for naming or image size. Standards for both of these would help manage the database as well as improve the display.

Image parameters or features include:

- Permalink URL to reference the image file
- Display in three sizes (pixels – largest side):
 - Thumbnail (150×150)
 - Medium (300×300)
 - Large (600×600 or 1024×1024 in BP Gallery)
- Link to a URL including the original media file to create a larger view
- Caption text display below the image
- Alternative Text, used by screen readers
- Description text supported by simple editing tools
- Replace Media option that enables an upload of a new file without changing the link or related information

WordPress Media also provides a set of simple image editing tools including:

- Scale image to specific pixel size
- Crop image maintaining or setting the aspect ratio
- Rotate counter clockwise or clockwise
- Flip vertically or horizontally

These editing tools are very basic. It is better to do image editing with a more capable utility prior to upload.

Images can be uploaded individually or a selected set of images at one time. The page and post editing tools provide a means to add an image at a selected location in a text document or to create a gallery of photos for display.

There are a number of image sizes that are coded into The Warren S Johnson Society Theme. Other sizing can improve the consistency of image display. These are given in the following table subject to further testing.

WSJSociety.com Image Size Standard

Name	H	V	Application
Thumbnail - IM9	150	150	General display w/link
Medium - IM6	300	300	General display w/link to Media
Large - IM1	1024	1024	General display max image size - matched the blue bar
Home Banner - IM3	975	300	Slide Featured Image
Home Column Main - IM7	300	100	Column Main feature image on the Home page
Home Column Sub - IM1	135	100	Column Sub feature image on Home page
Landing Page Feature - IM2	1024	300	Landing page featured image coded with title and excerpt text; <i>verify sizing/ 975 x 300 works fine - same as IM3</i>
Landing Page Sub - IM8	135	100	Landing page column image; 3 columns used with text to the right of each; sized to be responsive
Landing Page Column - IM6	300	300	Landing page 3 column image display; <ul style="list-style-type: none"> • <i>test display of 3 medium images in a single row</i> • <i>link them to their media file for a larger view</i> • <i>add multiple rows - how many?</i>
Feature Image with Sidebar - IM4	600	150	Feature image for any page with a sidebar
Widget Image - IM5	320	180	Widget image

Support

Support for WordPress is provided by:

- WordPress.org the source organization
- WordPress Codex their online support documentation
- WebTegrity one of many YouTube Channels of WordPress Designers

Hosting and support for WSJSociety.com is provided on an on-going basis by McDill Design per agreement with Johnson Controls. The current agreement covers maintenance of hosting services, software, and troubleshooting issues where the site is not functioning as designed.

Content

WSJSociety.com is a social media website dedicated to serve the members of the WSJ Society. The current services provided by the society to its members are described in Notebook: WSJ Society Business Model that is available on the [WSJSociety.com Update/Project Page](#).

As a developing resource for providing those services, WSJSociety.com has content that is available to the public and content that is available only to members who have registered on the site and have logged-in to access those resources.

Public Content

The intent of public content is to increase awareness of the society and its activities to those who are eligible candidates for membership and provide community service through shared experiences. The primary components of public content include:

- LEARN Section
 - About the Society & Enroll for Membership
 - President's Message
 - From the Editor
 - Johnson Controls Archive Stories & Timeline
 - Resources for Lifelong Well-being

- CONNECT Section
 - The Hub
 - News
 - Newsletter Archive
 - Photo Gallery
 - Upcoming Events
 - Poll & Poll Archive

- Misc
 - Help
 - Support
 - Join the Discussion
 - WSJSociety.com Update/ Project Page

Members Only Content

The social media features of WSJSociety.com are provided as Members Only content on WSJSociety.com. The primary components of Members Only content include:

- Members Only Menu
 - Benefits – Opportunities & Discount Program
 - Member Directory
 - Event Calendar
 - Suggestion Box

- WSJ Society Social Media Features
 - Create/Edit a personal profile – [Edit Profile](#) is broken
 - Search active member list
 - Connect/Message active members
 - View/Post/Comment in Newsfeed of member postings
 - Create/Join a Group for discussion with other members

The Members Only content is intended to provide an environment in which members can make personal connections with other members. The level of privacy provided in this section is controllable by each member through settings in their personal profile.

SITEMAP

A link to the Sitemap is available at the bottom of each page on the website. The map as of January 13, 2016 is as follows:

- [Home](#)
- [Learn](#)
 - [About the Society](#)
 - [President's Message](#)
 - [From the Archives](#)
 - [JCI Archive Timeline](#)
 - [From The Editor](#)
 - [Resources](#)
 - [Company Resources](#)
 - [Resources: Volunteer/Contribute](#)
 - [Resources Feature: LearnHowToBecome.org](#)
 - [Resources Library](#)
 - [Resources: Health & Well-being](#)
 - [Resources: Fitness-Mind & Body](#)
 - [Resources: Finance](#)
 - [Resources: Work](#)
 - [Resources: Lifelong Learning](#)
 - [Resources: Crafts & Hobbies](#)
 - [Resources: Travel](#)
 - [Resources: Entertainment](#)
- [Connect](#)
 - [News](#)
 - [Newsletter](#)
 - [Poll](#)
 - [Poll Archive](#)
 - [Photo Gallery](#)
 - [Gallery: Reunion 2010](#)
 - [Gallery: Reunion 2012](#)
 - [Gallery: Photos 2013](#)
 - [Gallery: Photos 2014 Mke](#)
 - [Gallery: Robots in School!](#)
 - [Gallery: Reunion/SECD-E Philadelphia 2013](#)
 - [Gallery: Reunion/SECD-W Dallas 2013](#)
 - [Gallery: Reunion 2014](#)
 - [Gallery: Photos 2015 Mke](#)
 - [Gallery: Photos 2016](#)

- [Upcoming Events](#)
 - [Winter Luncheon, Milwaukee 2015](#)
 - [Spring Luncheon, Milwaukee 2015](#)
 - [Summer Luncheon, Milwaukee 2015](#)
 - [Autumn Luncheon, Milwaukee 2015](#)
 - [Winter Luncheon, Milwaukee 2016](#)
 - [Spring Luncheon Milwaukee 2016](#)
- [The Hub](#)
 - [Reunion 2014 Info](#)
 - [Ambassadors of Lifelong Engagement](#)
 - [JCI in the News](#)

- [Members Only](#)

- [WSJ Society](#)
- [Gallery](#)
- [Newsfeed](#)
- [Members](#)
- [Groups](#)
- [Member Directory](#)
- [Suggestion Box](#)
- [Benefits-Opportunities](#)
- [Discount Programs](#)
- [Events and Volunteer Calendar](#)
- [Locations](#)
- [Categories](#)
- [Tags](#)
- [My Bookings](#)

- [Help](#)
- [Support](#)
- [WSJSociety.com Update/ Project Page](#)
- [Join the Discussion](#)

Test & Learn Trials

The next step in the Update process is the Test & Learn Trials. These are driven by member needs and responses. Those needs were identified on the Value Proposition Canvas created for each member segment (refer to [WSJSociety.com Update/ Project Page](#)). We'll use the value propositions to guide a series of update trials and monitor performance through Google Analytics and use of the polling utility that is part of the website.

Note: On review of the website, to this point, a number of issues have been identified and captured in a Table in the Appendix, Current Design: Issues/Options/Action/Result. They will be addressed as we go through the Test & Learn Trials.

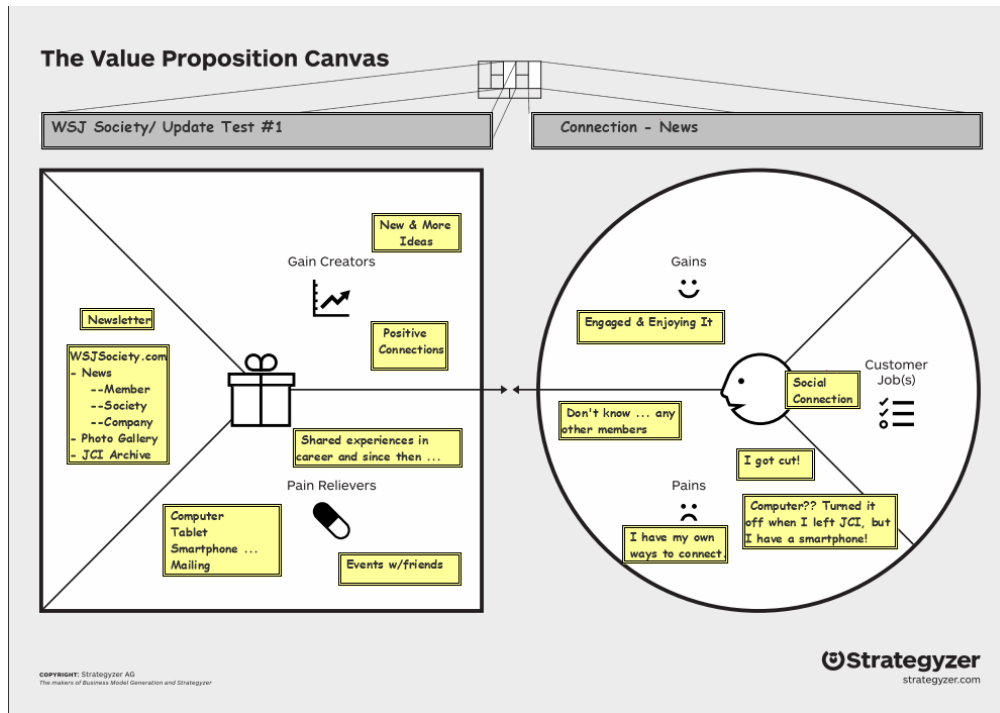
Update Test #1 – Connection

A common job for each of the member segments is Social Connection. WSJSociety.com can improve its performance in helping members in this regard through a more interesting presentation of news about both members and company.

Also, the information on the website should be more readily accessible. While we're testing news upgrades, ensuring that all pages on the website display properly on computer, tablet, or smartphone seems in order. Perhaps some of those members who have turned-off their last computer have a tablet or smartphone. They will be able to participate in the community with those.

As described on the Value Proposition Canvas and Test & Learn cards for Test #1, upgrades will be made to improve the accessibility of the website, ease website navigation, and provide news in a more interesting manner. That will involve making changes to:

1. The Hub – tablet & smartphone friendly; more comprehensive/*Done with Three Column format of Section Landing Page Template (2016/03/13)*
2. The News – more interesting display – more pictures!/*Done, created the Front Page with Three Column format of Section Landing Page Template (2016/03/28)*
3. Photo Gallery – more interesting display/*Tested Section Landing Page – display is OK, but requires manipulation of HTML. Try again to leverage the features of the page as learned from The Hub and Front Page. (2016/03/28)*



Test Card

Test: Connection - News **Start:** 2016/03/01

Assigned: Project Team w/Member Response **For:** 6 months

STEP 1: HYPOTHESIS

We believe that Interesting news of members, society activities, and the company, easily accessible, will promote member connection, enjoyment, and engagement with the society and its members.

STEP 2: TEST

To verify that, we will Re-design the News and Photo Gallery pages to improve presentation interest. Re-design The Hub to ensure it and all News pages display properly on smartphones and tablets; Solicit members for stories on stage.

STEP 3: METRIC

And measure Page Views (Current Nov 1 -- Jan 31) of News (461), JCI Archives (492), & Photo Gallery (68); Number of stories submitted by members.

STEP 4: CRITERIA

We are right if Page views for each of the monitored pages increases by 25% over the current quarter as quoted and at least 10 members submit a story to share. A simple update on their current activities is sufficient.

Copyright Business Model Foundry AG. The makers of Business Model Generation and Strategyzer.

Learning Card

Insight: Connection - News **Date:** 2016/09/01

Assigned: Project Team w/Member Responses

STEP 1: HYPOTHESIS

We believed that Interesting news of members, society activities, and the company, easily accessible, will promote member connection, enjoyment, and engagement with the society and its members.

STEP 2: OBSERVATION

We observed

STEP 3: LEARNINGS AND INSIGHTS

From that we learned that

STEP 4: DECISIONS AND ACTIONS

Therefore, we will

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Social Connection is a proven benefit to personal health and well-being at every stage of life. It is also one of the primary interests members identify for their membership in the WSJ Society.

Our website, WSJSociety.com, offers a way for all members to get and stay connected. The hurdle is online access. Ensuring that the website pages display properly on all devices pushes that limit to a smartphone.

The critical component is content that is of interest to members, displayed in an inviting manner, and updated frequently enough to have members coming back for more.

The best content is that submitted by other members. Members want to hear about other members -- even if they did not know them during their career. There is a common bond, career experience at Johnson Controls and that's enough to make each member of interest to all members. And, it doesn't matter if you 'got cut' lots of members were caught in that grinder! It happens. Let's move on, building on positive relationships and experiences to create even more of those.

In addition, expanding coverage of company news; improving the display interest of all news and photos; and regular updates is expected to promote member connection and activity with the WSJ Society.

Modifications to the website for this test are scheduled to be completed by March 1. The test will be continued for 6 months, allowing promotion in Newsletter issues and Luncheons.

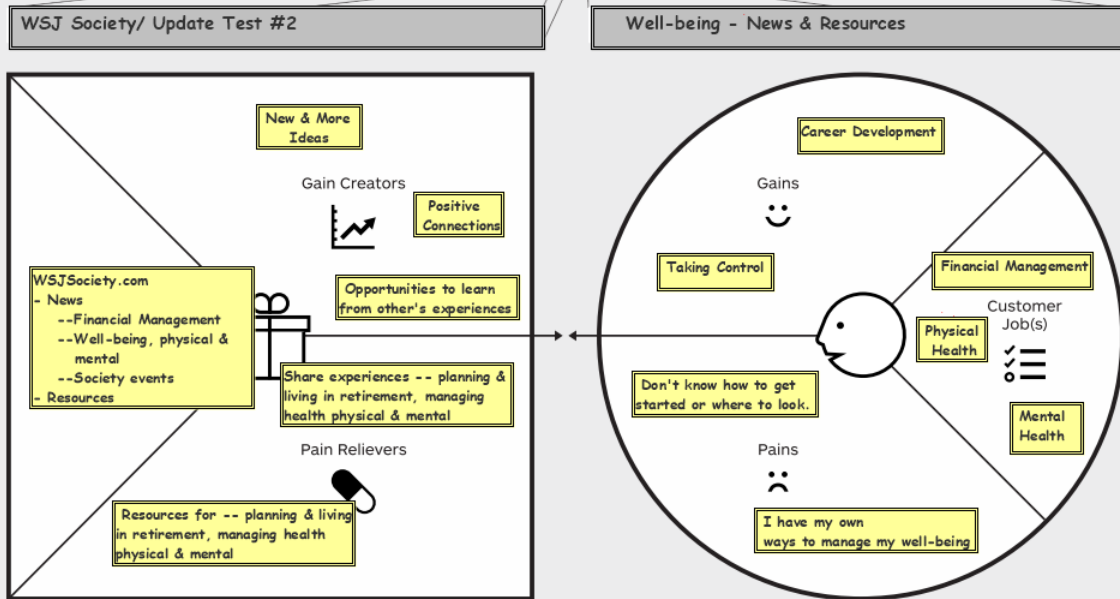
Update Test #2 – Well-being

In-career or retired, financial planning, mental and physical well-being are core interests of members. Adding to the enhanced interest of news presentation this test will expand the scope of News to include topics related to financial planning and well-being. Also, existing content on WSJSociety.com will be adjusted to reflect these.

As described on the Value Proposition Canvas and Test & Learn cards for Test # 2, upgrades will be made to expand the scope of content and add financial planning and well-being message to existing content. That will involve making changes to:

1. The News – expand the scope/ *Expanded scope using the Front Page (2016/03/28)*
2. Resources page – adjust to highlight impact on well-being
3. Adjust promotion of society events to reflect a well-being message/ *On-going task*
4. Create a poll to solicit member response to the changes

The Value Proposition Canvas



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Test Card Strategyzer

Test: Well-being - News & Resources Start: 2016/04/01

Assigned: Project Team w/Member Response For: 6 months

STEP 1: HYPOTHESIS

We believe that given an interesting offering of selected articles on key member interests, e.g. financial planning, physical & mental well-being, members will revisit the website on a regular basis.

STEP 2: TEST

To verify that, we will Expand the scope of News stories to include topics on financial planning and well being; Redesign the Resources page to present resources on these topics; Promote society events with a flavoring for their contribution to well-being; Create a Poll of member interests.

STEP 3: METRIC

And measure Page views (Current Nov 1 - Jan31) of News (461), Resources (59), and member responses to a poll regarding topics of interest to them.

STEP 4: CRITERIA

We are right if If Page views for News increase 10% above that expected for Update Test#1 i.e. to 35% increase, Resources increases 25%, and if at least 25 members record their topic interests on the Poll.

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Learning Card Strategyzer

Insight: Well-being - News & Resources Date: 2016/10/01

Assigned: Project Team w/Member Response

STEP 1: HYPOTHESIS

We believed that given an interesting offering of selected articles on key member interests, e.g. financial planning, physical & mental well-being, members will revisit the website on a regular basis.

STEP 2: OBSERVATION

We observed [Empty]

STEP 3: LEARNINGS AND INSIGHTS

From that we learned that [Empty]

STEP 4: DECISIONS AND ACTIONS

Therefore, we will [Empty]

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In-career, or retired, financial planning, mental and physical well-being are important interests to all members.

Expanding the scope of topics available on WSJSociety.com News and Resources will help members address these issues and promote regular returns to the website for interesting information of value to them.

Of course, the WSJ Society is not a financial or health advisor. We can only share our experiences and information that we have found of interest. But sharing experiences is one of the core benefits of belonging to a community like the WSJ Society.

We are indeed better together -- just like we were when we shared our talents, skills and experiences in our careers with Johnson Controls.

Update Test #3 – Contribution

Another job shared by our members is contribution, making a difference for others.

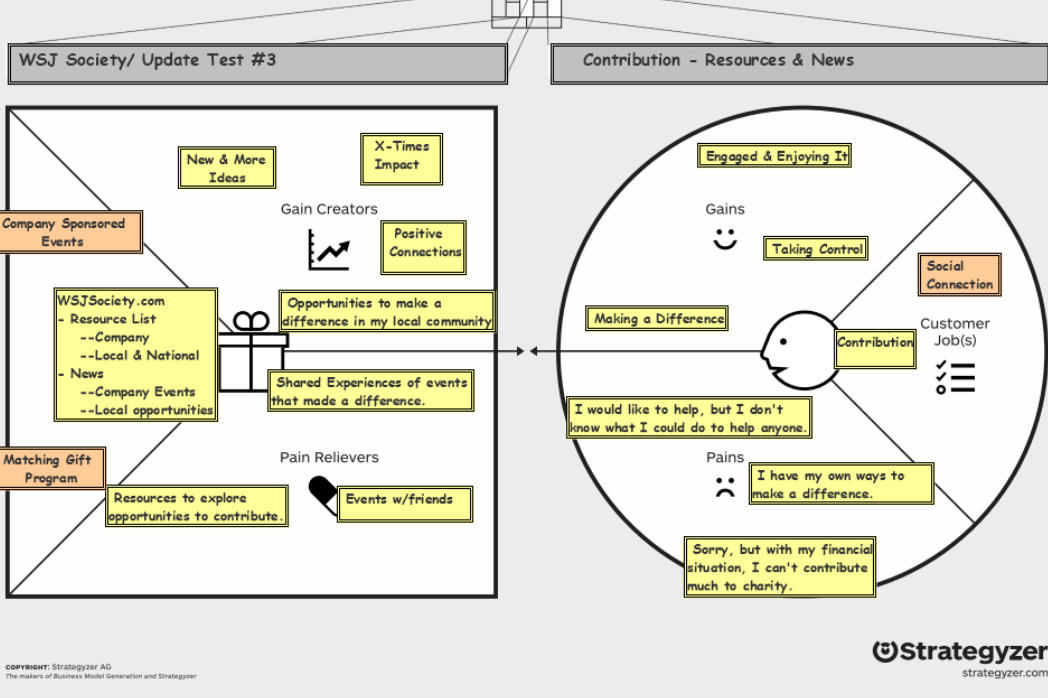
As described on the Value Proposition Canvas and Test & Learn cards for Test # 3, upgrades will be made to identify and promote opportunities for members to participate in events in their local communities.

This initiative can start with a focus on Milwaukee area opportunities. Most of our membership is there and we currently have a standing invitation to several events supported by the company in Milwaukee. However, expansion to any community where members reside could be initiated by any of those members.

This will involve making changes to:

1. Redesign and expand the content of the Resources page/ *Additions related to elder care (2016/03/28)*
2. Populate the Event Calendar with opportunities for members to participate in events in their local community
3. Expand News stories on events and promote opportunities for members/ *On-going with the creation of the Front Page (2016/3/28)*
4. Create a poll to solicit member responses to the changes.

The Value Proposition Canvas



Test Card | Strategyzer

Test: Contribution - Resources & News | Start: 2016/05/01

Assigned: Project Team w/Member Response | For: 6 months

STEP 1: HYPOTHESIS

We believe that making a difference for others is one of life's best rewards. While members are today making significant contributions to their local communities, participating with other members offers special benefits for both community and contributor.

STEP 2: TEST

To verify that, we will Re-design and expand the Resources page sources of contribution opportunities; Populate the Calendar with events to contribute; Expand News topics to include stories on opportunities; Create a poll.

STEP 3: METRIC

And measure Poll results regarding member interests; Number of member reports of participation

STEP 4: CRITERIA

We are right if at least 25 members respond to the poll regarding their interests and at least 2 members report on their activities to contribute -- even those they are currently doing. (Would love to bump that number up by several powers of 2)

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Learning Card | Strategyzer

Insight: Contribution - Resources & News | Date: 2016/11/01

Assigned: Project Team w/Member Response

STEP 1: HYPOTHESIS

We believed that making a difference for others is one of life's best rewards. While members are today making significant contributions to their local communities, participating with other members offers special benefits for both community and contributor.

STEP 2: OBSERVATION

We observed

STEP 3: LEARNINGS AND INSIGHTS

From that we learned that

STEP 4: DECISIONS AND ACTIONS

Therefore, we will

Copyright Strategyzer AG. The makers of Business Model Generation and Strategyzer.

In-career or retirement, making a difference for others is indeed one of life's best rewards. As demonstrated by members at Reunion 2014 and noted in the annual United Way Campaign, our members are making a difference in their communities today.

Why get involved with WSJ Society to do something I am already doing my own way?

Why? Because there's multiplier effect in force when members contribute with other members of the WSJ Society. That's easy to see when we give through the Matching Gift Program. Johnson Controls allows us to leverage their financial resources. Our \$1 becomes \$2 for the United Way. Our participation in Bowling for Kids' Sake sponsored by the company makes our fun a source of funds for kids.

But contribution is not all about money is it? How about the opportunity to contribute our time and talent through a Blue Sky Involve Project? The company does all the setup. All we have to do is show up!

Blue Sky Projects are available wherever a current employee makes a successful proposal -- anywhere! That's an opportunity for WSJ Society members to do some plotting with current employees in their local community to create a project together.

What an opportunity to make a great local social connection to make a difference! Let's see, about 130,000 current employees, and there's got to be at least that many retirees spread out across the planet. What a force to do some good!

Appendix

Current Design: Issues/Options/Action/Result

Date	Issue	Options	Action	Result
2016/2/1	11 of 11 Active plugins have updates pending for download	<ul style="list-style-type: none"> - McDill to update - Editor to learn and update 		
2016/2/1	BP Gallery(BuddyDev) plugin was obsoleted as of 2015/8/15	<ul style="list-style-type: none"> - Stay with BP Gallery - Update to MediaPress? 		
2016/2/1	Plugin Automatic Sign Out for Inactivity is deactivated and obsolete	<ul style="list-style-type: none"> - Find a replacement - Go on without the feature 		
2016/2/2	<p>Persistent error message:</p> <p>Fatal error: Theme CSS could not load after 20 sec. Please download the latest theme at http://galleria.io/custom</p>	<ul style="list-style-type: none"> - Continue to ignore it - it has been a problem since the start - Upgrade to MediaPress as recommended by BuddyDev - Delete the plugin entirely and do images w/o a gallery 		
2016/2/2	On some pages, the sidebar gets in the way. It would be better to have the entire page width available.	<ul style="list-style-type: none"> - Work around it, e.g. use the landing page template that does not have a sidebar - check if the Dashboard/ Appearance/ Widgets editing functions can be used to remove the sidebar from selected pages 	- Template Section Landing Page was used in The Hub re-design and several other pages (2016/03/13)	- Good so far, will continue to use it on other page updates/ applies to the Front Page 2016/3/28
2016/2/2	"Top Links" is included in Appearance/Menus, but there is no content listed	<ul style="list-style-type: none"> - Ignore, no apparent impact - Investigate for potential use 		
2016/2/2	<p>Slides</p> <p>We elected not to have moving slides at startup.</p>	<ul style="list-style-type: none"> - Continue as is - Investigate the potential to restore the moving slide feature to the Home page 		

Date	Issue	Options	Action	Result
2016/2/11	Newsletter template page is not responsive, the left column sidebar does not go away, leaving little space for content.	<ul style="list-style-type: none"> - Replace the Newsletter template with Section Landing Page template which is responsive - Revise content & access to the Newsletter Archive page 	- Javier modified the Newsletter template to be responsive (2016/03/13)	- Works well, it could be used where it may fit
2016/2/11	Sitemap indicates that not all parent page relationships are ordered	- Order them!	- Parent relationships were applied (2016/03/13)	
2016/2/11	membernote - archive appears to be pointing to the wrong database i.e. Members rather than membertotes	<ul style="list-style-type: none"> - Ignore for now - Correct the code when I know better how to do that and why I would want to do it - Delete the page From the Members and associated post. 	Delete this - I think it was from an early mistake I made! (2016/3/28)	
2016/2/12	A number of post categories are defined but unused; several were apparently from failed tests	<ul style="list-style-type: none"> - Ignore, put up with the clutter - Check the codex on category and clean them up 		
2016/2/12	<p>The Media Library is a jumble:</p> <ul style="list-style-type: none"> • non-standard sizing • fields not completed • poor title structure for search of images • Link to media has not been used consistently 	<ul style="list-style-type: none"> - test options for standards, sizing, captions, alternate text - identify standard sizing and name convention for use in pages and posts - max display of people 	- Currently testing the set of image standards noted in the table IM1 - IM8 (2016/03/13)	- IM7 works well with The Hub and IM3 for Section Landing Page feature image
2016/2/12	BP Gallery setting only allows images & PDF files, Audio & Videos are not enabled	<ul style="list-style-type: none"> - Leave as is, not used so far - Test capability & explore potential value - Can they be uploaded for use in pages i.e. not in a Gallery? 		

Date	Issue	Options	Action	Result
2016/2/12	Image Size settings Dashboard/Media & BuddyPress are different	- Investigate the impact while developing standard sizes	- Using 975 px for large image size (2016/03/13)	- Good so far, it matches the blue bar
2016/2/13	Additions to Resources, Photo Gallery and Upcoming Events increase the length of sitemap adding to complexity	- Change the design to provide additions to these components on a single page available via scrolling down a longer page		
2016/2/13	Become a Member link on Home Page is broken!	- Fix it - Verify link in About the Society	- changed the link & button text from Member Benefits to Enroll for Membership - Enroll link comes up when not logged-in	2016/2/13 - both locations go to Enroll... but mouse over still shows Member Benefits
2016/2/13	The Support page is blank	- Delete it - Try support options to meet member needs at the site		
2016/2/13	Edit Profile link is broken	- Try later - due to database update? - Email to Javier - this one gets into the database link	- Contacted Javier; he found and fixed the problem (2106/03/13)	- Problem resolved
2016/2/13	None of the multiple Groups available are being used by the members.	- The Groups were initially setup to demonstrate options available to members - leave them for now, in hope members will start using them - Reduce the number of Groups, maybe only Open Forum to focus attention there for discussion. Treat it like a blog with regular posts to promote discussion.	- Placed a note in all Groups noting that they may be removed in favor of a single Group - Open Forum (2016/03/13) - Sent a message to Paul regarding the impending change; urged him to make his own decision regarding he Baseball Group	- No response to date, 2016/03/28

