

OLLI Penn State Technology Overview

Data Base and Registration System

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A brief history.....

- ◆ OLLI Penn State...
 - began as Community Academy for Lifelong Learning (CALL) in 1998
 - we are a 501(c)(3) corporation
 - re-affiliated with Penn State in 2007 and formally changed our name to OLLI Penn State
 - Have grown from less than 50 members in 1998 to over 900 in 2009

Technology Evolution

- ◆ By 2001, "CALL" was awash in paper, manual processes and a disjointed record keeping system
- ◆ A team was formed to begin "office automation"
- ◆ Project began production in 2002 and has evolved continually since

The Early Years

- ◆ Microsoft Access was selected as the technology platform
- ◆ System started on a small peer-to-peer network with 3 computers
- ◆ Functionality was added/changed as required and resources permitted

Current State of Office Support System

- ◆ Server-based, with 4 staff computers in house
 - Remote Access to volunteers/staff (24/7)
 - Volunteers/Staff enter course information, instructor, schedule and facility data....which is then used to produce our catalog
 - “almost” all office activities are managed through the data base

Early Foray into Online Registration

- ◆ We have implemented a “poor man’s” online registration system using a Google Survey that is converted each day to “registration forms” that are entered by staff
- ◆ We do not have online payment capability...yet

“Inventory” Management Problem

- ◆ Our member median age is 69....consequently, we have members without computers and access to the internet

....so how do we allow “online registration” without disadvantaging those who rely on US Mail, fax, telephone (and staff office hours)?



OLLI Penn State Office Support System

**Member
Information**

Reports

**Instructor
Information**

**Facility
Information**

**Activity/Course
Information**

Process Checks

**Volunteer
Information**

**View
FilemakerPro
CALL Info**

Members

Maintenance Functions

Member Lookup

Modify Member Information

Add Member

Member Enrollment

Reports

Member Report

Membership Longevity Report

Member Non-Renew Report

New Member Report

Enrollment Report by Township

Activities

Maintenance Functions

Reports

Add Activities

Maintain Activities

Enter 2009 Winter Lecture Series Evaluations

Class Roster

Class Roster with Medical

Waitlist Report

Blank Class Assistant List

Enrollment Summary (Course # Order)

Enrollment Summary (Alpha Order)

Activity Tally Form (blank)



Instructors

Maintenance Functions

Maintain
Skills/Interests List

Reports

Instructor Report

Full Instructor
Report

Instructor Thank
You Letters

Volunteers

Maintenance Functions

Volunteer Info

Profiles

Volunteer
Positions

Committee
Member Info

Interest Reports

Tasks Only - Roster

Tasks Only - with
other interests

Committees Only

Teaching Only

Facility/Rooms

Maintenance Functions

Add Facility/Room

Modify Facility/Room
Information

Searches

Searches do NOT include Private Residences

Room Capacity

Term Last Used

Search Room Features

All Features

TV/VCR

Darkened

Board

Screen

Overhead
Projector

Slide
Projector

Kitchen

Piano

Sound
System

Reports

*Reports do NOT include Private Residences
unless otherwise noted.*

Room Capacity

Facility Confirmation
(with Private Residences)

Term Last Used

Facilities Contact
Info

Facilities Contact Info
(with Private Residences)

Facilities: All Info

Room Features Reports

All Features

TV/VCR

Darkened

Board

Screen

Overhead
Projector

Slide
Projector

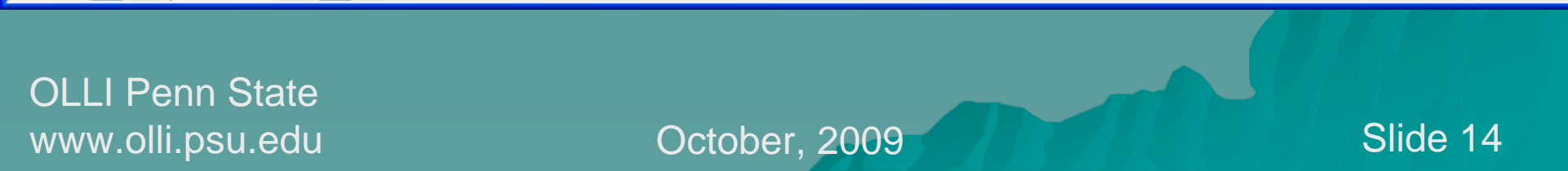
Kitchen

Piano

Sound
System

Reports

Class	Labels	Membership	Volunteers	Contributions	Instructor	Facilities
Class Enrollment Summary (Course # Order)	Labels, Zip Sorted	Member Report	Volunteer Interest Tasks Only - Roster	Contributions By Month	Instructor Report	Facility Confirmation Report
Class Enrollment Summary (Alpha Order)	Labels, alphabetic	Member Non-Renew Report	Volunteer Interest Tasks Only - with other interests	Detailed Contribution Report	Full Instructor Report	Facility Contact Info
Class Roster	Labels, by Activity	New Member Report	Volunteer Interest Committees Only	Unacknowledged Contributions	Instructor Thank You Letters	Facilities Contact Info (with Private Residences)
Class Roster with Medical	Labels, Instructor	Membership Longevity Report	Volunteer Interest Teaching Only	Invoices	Instructor Listing (contact info for ALL instructors)	Room Capacity
Waitlist Report	Labels, Class Assistant	Membership Cards and Letters NEW MEMBERS		Open Invoice Report		Facilities: All Info
Blank Class Assistant List	Labels, New Member	Membership Cards and Letters RENEWALS		Open Invoice Reminder Postcards		Term Last Used
Activity Tally Form (blank)	Labels, Zip Sorted Spring 2008 ONLY	Enrollment Report by Township				Room Features
Suggested Courses		Key Statistics Report				



Summary of current capabilities...

- ◆ The OLLI Penn State system....
 - ◆ Maintains all member, volunteer and instructor records
 - ◆ Maintains all course/event and facility records and drives catalog production (print and online)
 - ◆ Handles all course/event registration, invoicing and payments
 - ◆ Produces mailing lists and reports for most major functions
 - ◆ Offers a partial online registration system

Future Vision

- ◆ In 2010, OLLI Penn State will move its “office support system” to a web-based server
- ◆ All staff will access web services for their work
- ◆ Members will have the ability to maintain their “member profile”, register online for courses and events, and pay online

Make vs. Buy vs. “Use”

- ◆ OLLI Penn State has to decide the same questions many of you face:
 - ◆ Can we use the system our host institution uses or has developed? Do we want to? What is the cost?.....
 - ◆ Should we buy a commercial offering? What compromises will we have to make? What are the up-front and ongoing costs?.....
 - ◆ Should we “build our own”? What are the costs? How long will it take?.....

Next Steps

- ◆ If OLLI Penn State's current system is of interest to your OLLI, email me and we'll arrange the "technology transfer"
- ◆ If your OLLI is faced with the make/buy/use decision...let's partner via a networking facility and share our findings
- ◆ If the decision of some OLLI's is to "make"...let's partner
 - Co-fund?
 - Seek funding?
 - Joint development?
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Share your thoughts, input, suggestions....

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