

L405

OA LODGEMASTER

2006 NATIONAL ORDER OF THE ARROW CONFERENCE

Session Length: 180 Minutes

Learning objectives:

- Develop an understanding of the importance of good membership management practices in any lodge
- Become familiar with the capabilities of the OA LodgeMaster system
- Learn how to use many of the functions within the OALM software via on-screen demonstrations
- Understand how OALM can help you achieve quality lodge



Required Materials:

- 2 computers running OA LodgeMaster
- Internet Access
- LCD Projector
- Chalk board or way to write audience responses
- PowerPoint Presentation: "L405 OA LodgeMaster"

Handouts:

- "Getting Started with OA LodgeMaster"
- "Request for Appointment of OA LodgeMaster Lodge Administrator" Letter

TRAINER PREPARATION

It is important that the trainer for this course is familiar with the many aspects of the OA LodgeMaster software system, as they will be conducting live demos of its features. If possible, the trainer should be a primary user of OA LodgeMaster in his or her lodge. Prior to conducting the session, be sure to review all of the features that will be discussed during the session.

SESSION NARRATIVE

Introduction:

5 Minutes

Introduce yourself to the class and discuss your involvement with the OALM project. Since the audience is quite large, it will not be possible to meet the class, but, using a show of hands, try to get a feel for the audience:

- What roles do you serve? (Key 3, Administrative Vice Chief or Adviser, other)
- How big is your lodge? (Small < 500, Medium 500–1000, Large >1000)
- Does your lodge use the chapter system?
- What do you use right now for membership management in your lodge? (Microsoft Access or equivalent, home-grown/custom application, Excel spreadsheet, paper, nothing)
- How many people expect to actually use OALM at home? Or are you just here to learn more and make a decision for your lodge?

Brief History of OA LodgeMaster:**5 Minutes**

Orient the audience with the history of the OALM Project and how it has evolved into what it is today. Four years ago, the National Committee of the OA embarked on an effort to create a tool that lodges could use to verify BSA membership status of their members. Subsequently, surveys were conducted to determine the methods that different lodges were using to keep track of their membership. It quickly became clear that a wide variety of custom applications, simple spreadsheets, and even paper rosters were being used, and that it was time for a unified application that could provide powerful functionality for all lodges, as well as providing a way to verify BSA membership. After pursuing different options, it was decided that it should be developed by members of the OA who understood the program the best and had the knowledge and time to devote to such a task. [Feel free to expand on this brief history to include the activities of the past year-and-a-half.]

Explain that membership management, and the OA LodgeMaster software, is about more than just keeping records – it is a set of strategies that lodges can use to run a better lodge and even attain Quality Lodge more easily.

Why Membership Management is Important:**10 Minutes**

This is a discussion that is intended to help the audience understand the point above (it's more than just recordkeeping). Ask the audience: What's the point of keeping track of all of our lodge members? Highlight the points below if they are not offered by the audience.

- Allow us to communicate because we have contact information
- Make sure people have paid their dues
- See statistics and (perhaps) trends about who goes through the Inductions Process
- Know what people have done in the past so they can help in the future

There are certainly others that audience members will mention. Continue the discussion by expanding the discussion to include Quality Lodge requirements: [While you're discussing, show brief screenshots of OALM features]

- What about determining positive membership growth and brotherhood conversion? Of course a good record-keeping system will tell us if we've met these first two requirements of Quality Lodge. But how about telling us in real-time how close we are to that goal? What if a computer program could help us to project how well we'll do in meeting these two goals? What if, based on ten years of history, the software can automatically create goal targets for each chapter? [QL 2&3]
- What if we could easily invite everyone eligible to our LLD event, and once there, make sure that we've had 75% of eligible members attend? [QL 4]
- What if we had a system that kept track of all of the units in our lodge so that we knew how many we had contacted in the year? Better yet, what if multiple people in the lodge could tell this system when they had contacted the unit, conducted an election, or even provided a camp promotions visit? What if our system could tell us who had never been visited? [QL 6 & 8]
- What if a computer system kept track of our lodge budget, and that lodge leaders like our Treasurer could securely access that information and update it? [QL 9 & 11]
- What if we could keep track of which lodge members knew which ceremony parts? Even better, which ones had actually memorized their part and been certified as knowing it? [QL 13]

- What if the system would even fill out the Quality Lodge Petition form for you??

Obviously, you could continue with more here. Make sure that the audience sees the connection between attaining Quality Lodge and effective membership management (“As you can see, effective membership management can actually help us to attain Quality Lodge!”).

It’s About People Too:

5 Minutes

For the past ten minutes, we’ve been talking about software and records and information. But, it’s important to talk about the human side of membership management, too. Talk about how people fit into a lodge’s membership management strategy (and, of course, tie it back to LodgeMaster in the end!):

- Does your lodge have a Membership Vice Chief and Adviser? Or, an equivalent? Does each of your chapters have an equivalent person? Who has time to input data like newly elected candidates, or unit visitations?
- What if we could spread the load among many individuals? That’s great, but does that raise any concerns? Accept some comments from the audience, highlighting the following:
 - Certain people should only be able to see certain information (“Like what? Who should be able to see what?”).
 - Since most lodges don’t have an office *per se*, how can we make the same data available to multiple people?

So, we now have some additional constraints on any system that we might want to use for managing our membership.

Membership Management Summary:

5 Minutes

Of course, this session is entitled “OA LodgeMaster” and it obviously focuses on the OALM software system, but OALM may not work in every situation. The software was designed with all sorts of lodges in mind, but sometimes that’s not possible. Regardless of how your lodge chooses to manage membership, we’ve now gone over a few requirements for a good quality membership management system, and we’ll add a few more to the list now:

- It should keep track of records and hold data properly. (This is an obvious one)
- It should help you attain Quality Lodge, not only by keeping track of progress, but by helping you make progress.
- It should allow for different individuals to access the data, but only certain data.
- It needs to keep your data safe (both from a security standpoint and a backup standpoint).
- It needs to work for you and your lodge. This is perhaps the most important, but one that you’ll have to decide. This includes working for your council, too.

“Anything else?”

Introduction to the OALM System:

5-7 Minutes

The OA LodgeMaster software system was designed to meet all of these needs. Provide an overview of the entire system:

- The OALM system is broken down into two parts—OALM Desktop and OALM Online—which are all connected by the Internet.
- OALM Desktop is the actual software program that you install and run on your computer. This software can be installed on many different computers: your lodge chief's laptop, your lodge adviser's desktop, your chapter chiefs' computers, etc. It requires Windows XP or Windows 2000. This program is a typical "database application," meaning that there are forms that you use to input data into the system and reports that you use to view data.

** Note that this part of the system is self-contained if desired, meaning that lodges are not *required* to use the OALM Online website or use any synchronization over the Internet, but it is a free service and is highly recommended.

- OALM Online is a companion website that provides additional functionality and access to certain data to individuals who don't need the entire OALM Desktop software installed on their computers. This website includes things like RSVP'ing for lodge events, viewing contact lists, etc.
- These two components are bridged together with the OALM Server, which coordinates all the transfer of data between multiple copies of OALM Desktop and OALM Online securely over the Internet. This server also provides automatic nightly backups of your entire lodge database.

This might be somewhat confusing, so ask if there are any questions.

How it Works:

[Diagram]

Review the stages of the OALM System in a visual manner depicting the flow and process of the data transaction process.

Session Summary:

As you can see, OA LodgeMaster can handle a number of different scenarios, allowing you to stay up-to-date with everyone else using manual methods like e-mail (which is slow, confusing, insecure, and difficult to keep track of).

OALM can help improve record keeping, membership, activities participation, communications and resources to help build a Quality Lodge. The OALM Desktop and OALM Online programs are bridged thru the OALM Server. Please check the website frequently as development and new features continue to progress because OALM is getting better all the time. And, most importantly remember, "it's about the people".

Take any final questions, and then dismiss for a ten minute break.

BREAK	10 Minutes
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SESSION TWO:

Regroup & Introduction:

5 Minutes

The next two hours are not intended as an intense technical "how-to." This session is designed to demonstrate the capabilities of the OA LodgeMaster system.

Trainer Tip: Based on the assessment at the beginning of the session, the next two hours can be geared more toward a technical instruction if the audience is largely composed of individuals who will actually be using the software when they return home (“hands-on users”).

Start off with this very important note: For the rest of the session, everything shown will be as if the lodge has chosen to run OA LodgeMaster in its default Standard Mode (with Internet synchronization via the OALM Server and OALM Online). It is assumed that only very few lodges will use the “Offline” mode. Take a minute to ask if anyone plans to do so, and if there are many, try to encourage the use of Standard mode (nightly backup, automatic secure synchronization, multiple users, all for free).

Usage Scenarios:

15 Minutes

To further illustrate how the system works, here are a few scenarios to consider: [Use slides to illustrate]

- **Simple Offline**

In Lodge A, Membership Vice Chief Jason opens OALM Desktop on his laptop and inputs some data. Jason’s lodge is small, so he is the only one that needs to access the lodge database. He takes in paper forms and inputs them himself, and returns paper reports to the lodge at the next LEC meeting. If anyone else needs some data and Jason is unavailable, they can’t access it. (We call this “Offline Mode” because it does not connect to the Internet to transfer any data).

Any questions?

- **Standard Plus Offline**

A few weeks later, Michael brings his laptop to the lodge Ordeal. Since he and Brian have already input all of the candidate information, he opens up the Ordeal Manager in OALM and can check in candidates and members, assign individuals and Elangomats to clans, and more. Of course, at the council camp, there is no Internet access, so none of these changes are uploaded. But, when Michael gets back home, he plugs back into the Internet, opens OALM, and all of the changes from the Ordeal are automatically uploaded to the OALM Server.

Any questions?

- **Standard Multiple User**

In Lodge B, Membership Vice Chief Michael runs OALM Desktop on his computer at home. He inputs data from last month’s lodge elections. When he is done inputting, the software automatically connects to the OALM Server over the Internet and uploads Michael’s changes. Next, Lodge Chief Brian opens his copy of OALM Desktop on his computer at home, which automatically downloads any updates, which include Michael’s new candidate information. Brian has a few election forms from his chapter’s elections, so he inputs the data from those forms. At the same time, Michael inputs a few more forms which he just received. As these changes are made, the two copies of OALM Desktop are sending their changes to the OALM Server and retrieving the updates from the other person. When they’re both done, they run a report to see how many candidates have been elected, and both Arrowmen see the same report, reflecting both Michael’s and Brian’s data.

Any questions?

- **Standard Multiple User Plus Online**

A month later, after the Ordeal, Chapter Adviser Scott wants his chapter to conduct a phone-a-thon to invite all of the newly-inducted members in his chapter to their chapter meeting. Scott doesn’t need the entire OALM Desktop software, so the lodge has given him (and all of the other Chapter Advisers) access to OALM Online. He opens his web browser and logs in, and he can

see his chapter roster and view newly-elected Ordeal members. He then prints out the list, brings it to his chapter meeting, and together with a few other youth, call all of them. A week later, right before the chapter meeting, Scott logs back in to OALM Online and sends a quick e-mail reminder to all of the same people they called a week earlier, quickly and easily.

Any questions?

- **Standard Multiple User Plus Offline**

At the next lodge fellowship, Lodge B decides to use OA LodgeMaster to let members RSVP online and check in when they arrive at the event. But this event draws hundreds of people, and one computer checking people in just won't cut it. Since there's still no Internet at the camp where the fellowship is, Membership Adviser Frank brings a few extra computers, and they use Michael's laptop as the "host" computer and all of Frank's machines connect locally to Michael's laptop on the network. When everyone gets home, only Michael has to reconnect to upload the data; nothing is stored on Frank's machines so he doesn't need to worry about sending updates. (This is obviously an advanced option of which very few lodges will likely take advantage).

As you can see, OA LodgeMaster can handle a number of different scenarios, allowing you to stay up-to-date with everyone else using manual methods like e-mail (which is slow, confusing, insecure, and difficult to keep track of).

Getting Started with OA LodgeMaster:

15 Minutes

[Hand out the "Getting Started" sheet and the "Request for Appointment of OA LodgeMaster Lodge Administrator"].

To get started using OA LodgeMaster (in Standard Mode, of course), a lodge goes through the following process:

- **Appoint an OALM Lodge Admin**

Submit an "Appointment of OA LodgeMaster Lodge Administrator" letter to the national office, which must be signed by your council's Scout Executive (or his designee). This letter authorizes an individual in your lodge to manage OALM users in your lodge. This person is responsible for handing out usernames and passwords to new lodge users. It is also the person that the OALM Staff will make contact with when we have completed setup of your lodge database. Typically, this will be an adult like the Lodge Membership or Administrative Adviser.

- **Convert your existing database**

The OALM Staff provides free conversion of your existing lodge database. Databases can be submitted via an Internet form on the oalodgemaster.org website or at the OALM Migration Center at NOAC. Converted databases will then be available and will be automatically downloaded on the first run on OALM Desktop.

- **Setup your users**

The OALM Lodge Admin will need to setup the lodge users next. [Details to come at a later time]

- **Download a copy of OALM Desktop**

Copies of OALM Desktop can be downloaded from the oalodgemaster.org website.

Trainer Tip: Due to the amount of time necessary and the potential for problems in the next two steps, trainers may wish to instead create screenshots of the important points in the process and display those in a PowerPoint presentation, rather than going through it in real-time.

- **Install OALM Desktop**
The graphical installer is just like other installations in Windows. [Walk through the installation process, including explaining some of the options.]
- **Run OALM Desktop for the first time**
When you run OALM Desktop for the first time, you will have to choose the lodge to which you belong. Once you make this selection, it cannot be changed. You will then login with the username and password that the OALM Lodge Admin provided for you (if not you). Since this is the first time running, OALM will need to download your lodge's database from the OALM Server, which may take some time depending on the size of the database. Once this is complete, you're ready to go.
- **Set lodge global settings**
This includes setting up (or disabling) chapters, setting the lodge's annual dues amount, and creating users.

OALM Desktop Tutorial:**40 Minutes**

The next part of the session shows the audience how to get started with OALM Desktop and introduces its main features. This should be done interactively using the copy of OA LodgeMaster that is installed on the presentation computer. You should cover the following activities:

Trainer Tip: Keep track of who/what you add to the database so that in Part III, when OALM Online is demonstrated, the audience can see the things you created reflected in the online version. (Sort of an "in case you didn't believe me" kind of thing)

- Create/edit a member
- Create an event
- "Manage" an event
- "Run" an ordeal
- Create a ceremony team
- "Visit" a unit
- Setup and checkout some assets
- Run an auction
- Use the finance manager to input costs for an event
- Create a trading post inventory and "sell" some items
- Create a user (explain the difference between a "user" and a "member")
- Import data [NOTE: Need to have a CSV import file ready]
- Export data
- Use the BSA Membership Verification System [NOTE: Need to have an export file from ScoutNet MVS to demonstrate the import]

- “Print” membership cards
- “Send out” a mailing
- Create a Brotherhood Eligibility List
- Run a Quality Lodge Audit
- View and print the lodge calendar

Take any final questions, and dismiss for another break. Also, tell them that we’ll be able to answer more questions over the break.

BREAK	10 Minutes
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Regroup & Questions:**3-5 Minutes**

Bring the group back together, and instruct them that the discussion is now going to shift to the online capabilities of the system. But first, are there any additional questions that arose over the break? (You might have picked up on some questions that need answering during the break; feel free to address them now or at the end of the session, at your discretion).

OALM Online Tutorial:**25 Minutes**

This part of the session should be conducted as before, interactively demonstrating the features on the screen using a web browser. Activities to include:

Trainer Tip: Try the following activities using various different user names with different permissions levels (Lodge Adviser, Lodge Vice Chief, Chapter Chief)

- Logging in
- View/search/print a roster
- Send a mass e-mail
- View a membership report
- RSVP for an event

Question and Answer:**20 Minutes**

At this point, open the floor up for questions from the audience.

Explain to the audience how to go about getting additional help:

- Via the Help file accessible in the “Help” menu in OALM Desktop
- By e-mailing support@oalodgemaster.org
- For certain circumstances, the OALM Staff may be able to help via phone. For instance, if you are setting up OALM in a networked environment at an event (something that we did not cover in

this session), we may be able to provide phone support to you. Of course, this is a volunteer organization and we can make no promises, but we'll do our best.

Finally, encourage the individuals to explore the software when they get home. There's no way to cover the entire feature set in a three-hour session. We tried to highlight some of the more interesting and unique features of OA LodgeMaster, but there are many more. For instance, there are hundreds of reports that were not covered, and features like the Auction were only touched on.

Thank the audience for their attendance and their attention, and wish them well. "Class dismissed."