

Online Registration Systems: Notes of a Conversation Among Three YMs

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Introductions

- Lawrence Alderson, Communications Committee Co-Clerk and Co-Registrar, PYM
- Jonathan Brown – IT Committee, NPYM
- Dido Clark – Co-Registrar, IMYM
- John Gotts – Web Keeper, NPYM
- Arthur Kegerreis – Communications Committee, PYM
- Mary Klein – Editor, Western Friend
- Fred Koster – Board Co-Clerk, Western Friend
- Joe Magruder – Co-Registrar, PYM
- George Mills – Communications Committee, PYM
- Nora Percival – Secretary, NPYM
- Jerry Peterson – Treasurer, IMYM
- Clint Weimeister – Registrar, NPYM
- David Zeiss – Rising Presiding Clerk, NPYM



Reports

- IMYM
 - We use “Reg Online,” which is an online registration software tool, and which requires some amount of customization of the questions and options presented to registrants
 - <https://www.regonline.com/?domain=en-US>
 - We’ve used that system since 2013 and it’s worked pretty well for us, it’s been economical; however, it was not as straight-forward in a “pay-as-led” context;
 - With pay-as-led, we need to configure it differently and promote it differently than we did before; we ended up with a large number of unpaid registrations this year (30-40 people)
 - We collect permission forms all in paper versions, which seemed crazy; it required a lot of scanning of documents; probably only 20% of people completed their permission forms ahead of time; I’d like to deal with these forms online; we have several forms and whether people need to sign them or not varies; seems like we could combine all the permissions into one form and/or consolidate them
- NPYM
 - NPYM used in 2018 same system as previous year; put in a fair bit of effort to improve it and it was still problematic in 2018; had a good user interface, but the underlying system was quirky
 - A number of years ago, we used a custom-built system was made in PHP and MySQL, but there were some major problems in 2017 due to on-going maintenance issues; and we essentially abandoned it in 2017 and relied mainly on a paper-based system
 - One of the quarterly meetings had cloned the yearly meeting’s system, so we used that clone as the starting point for a revised system in 2018; the result was pretty successful, but it still has flaws
 - We built a new user interface for the system in Drupal 8; We hope to expand our use of Drupal 8
 - For permission forms, we provide forms online that we ask registrants to print off, fill out, sign, and bring with them to registration check-in; They are filed by registration check-in and made available to children’s program. There are really only two forms – a medical release form and a form for accompanying an unrelated minor; this system seems to have worked ok
 - During the annual session, we tracked registration throughout the session; a few people’s registration records got lost
 - The system has an overwhelming amount of options for reports; it also required a lot of workarounds to get information out of the system, especially since the registrar did not have global access to information, so had to sign in as specific registrants to access their records or make any changes – this created some confusion
 - Several people just gave up on their online registration, so we needed to complete their registrations when they arrived at NPYM

- People were in general happy with the system
 - We took no paper registrations, people filled in forms online for others who couldn't do it themselves
 - We need to put some more effort in developing methods for pulling reports and information out of the system
 - We have an office during annual session; the registrar spent almost all of annual session in the office, helping people complete their registration forms and straightening out data
 - The system is set up so that most information in it is encrypted; this may be safer, but it makes it difficult to pull information out of the system
- PYM
 - Two parts of computerization of registration process: 1) forms and user interface and 2) processing of data afterwards
 - Forms for youth programs – we ask people to fill out these forms ahead of time and send them in; almost nobody does this; we do a pretty good job making sure that people do complete these at annual session; it would make the program planners' lives much easier if they got this information ahead of time, but people just don't seem willing to do this
 - As far as exporting data, we've put it into different programs over the years; for the last 15 years, we've used excel, with multiple tables interacting as a relational database in about 15 different sheets – for payments, yearly meeting subsidies, etc.
 - On the front end, we've done online registration for the last three years; this year and last, we had a contractor develop a system for us in WordPress; for the registrant, this works quite well; however, the data that is exported for the registrar is unwieldy – a table that's probably 200 columns wide;
 - There must be an online system that's simple for the user and that the output could be easily imported into something like Excel
 - Regarding payments – we are accepting payments through PayPal; we should probably charge people for taking that convenience
 - Comment from NPYM – From a treasurer's point of view, PayPal payments can be much easier to process than checks or cash, and maybe we should actually charge people extra for paying with checks or cash
 - Some people can only use cash; eg – people from Mexico
 - We're definitely using WordPress for more than it's designed for; also, all the options we give people to choose among is overly-complex
 - RegOnline? CiviCRM? These we want to look into; however, we're invested in WordPress
 - Wordpress exports are hard to modify and sometimes inconsistent

Questions

- How much time is normal for a registrar to spend on this task?
 - IMYM – three people spent every minute of the annual session supporting people with finding their places at annual session; plus 3-4 full days before annual

- session; registrar is expected to keep track of permission slips, volunteering options, housing, camping, meals, and payments; seemed that RegOnline has good options for allowing people to sign up for volunteer jobs; a lot of the complexity in the system is due to our own lack of simplicity – allowing people to have too many specific choices;
- New England Yearly Meeting is using Salesforce for their registration system; they do pay-as-led; possibly, all three of our yearly meetings might split the cost of something, <https://www.salesforce.com/>
 - PYM – are a lot of hours invested ahead of the annual session; maybe 150 hours all together; the time spent at yearly meeting is inconsequential; a fair amount of time first two days and then not much; however, we have other committees take responsibility for some parts of registration process; Children’s Program Committee handles permission forms; Ministry & Oversight handles worship groups, etc.; Is also a lot of work afterwards; chasing after people who haven’t paid and do accounting for the facility so we know what to pay them
 - IMYM – we have a tradition of accepting registrations up to the last minute; people even show up without having registered beforehand; this creates a huge burden for the registrar; setting a real cut-off would be a great step toward simplification
 - PYM – we add a 5% late fee on late registrations; for us, the people who register late tend to be about the same number as those who have registered and then don’t show up
 - This wouldn’t work so well in pay-as-led
 - NPYM – tried to close registration a couple weeks early; we actually got 80-90 registrations in that late period; we’re trying to think of ways to give incentives for early registrations
 - Early-bird discounts could be a good incentive
- There have been years that check-in has taken way too much time for the people standing in line – how to improve this?
 - NPYM gets help from staff of the university where we hold our sessions; help with people getting their room keys, meal cards, etc. (The only “problem” is that the university’s bill was based on our initial estimates of how many people were in which types of rooms, and they ignored the updated numbers we sent them.) Our actual physical check-in process goes quite smoothly and quickly; we check people off on the check-list that tells us whether we’ve gotten all the forms and payments they owe us, and we give them their information packets
 - The registrar’s output – can we put spreadsheets online with Google Sheets?
 - PYM – we have done this in previous years; but this year, because the WordPress output was so unwieldy, it was impossible to upload to Google Sheets;
 - If there was a simple form that entered
 - NPYM – Clint is playing around with a Drupal 8 web form that translates data into webform sheets ; Here is the current version; results can be downloaded as a spreadsheet. <http://npym.ptquaker.org/node/56>

- Are we allowing Friends too many options in their registration systems? Is it too complex?
 - NPYM – even though the results are more complex than we want in terms of data output, all the questions that we ask are necessary questions; we try to simplify as much as possible – eg meals are one package or it's up to the person to pay for individual meals
 - NPYM – People come to annual session for a spiritually and socially nourishing experience; so telling them, “tough, you’ve got to do it like this,” undermines that intent to be supportive; we should make it as accommodating as possible; there are already a lot of challenges in attending, even when we are doing all we can to make it easy for them; our job is to say “how can I help you?” – that should be the guiding attitude of our work
 - PYM – we need to also think about the data we collect and think about – First, will it be used at all? And second, will it be used in a way that facilitates people's experience at Annuals Session. -- We don't really need to know people's names, just what they need to be called at Annual session. We don't really need to know whether individuals are vegetarians or omnivores because we have enough experience to know the ratios. We do need to know about allergies, etc., So we need to figure out which questions will affect people's experiences
- What about privacy of people's information in the registration system? Can people have their information purged?
 - PYM – this is a question we will need to deal with, especially in light of GDPR; we need to attend to information that people gave years ago
 - NPYM – this is an argument for encryption of information in our database; good for privacy, but slows down report generation; we don't do purging of data, and in fact, having past info can be helpful in identifying trend and changes
 - There is not such thing as real privacy online
 - Our registration systems are the most likely the repositories of sensitive information on individuals in our YMs
 - IMYM – RegOnline holds info from all years we've used it; don't know how good their security is
 - IMYM – We also collect credit card information; and we have scanned checks and shared them via Google Drive, which is not the most secure way to share them
 - IMYM – want to implement “docusign” online signature system so that can do all work with permission forms online
 - PYM – we need to make sure that whatever system we use, we end up with a document that a hospital emergency room would accept as evidence that the person has authority to grant permission for treatment decisions
- Possibly, the three YMs could go in together on some particular efforts, eg:
 - Share cost of something like Salesforce
 - Share efforts to develop privacy policies

- Should we meet again “soon”? When? About what questions?
 - PYM – Online directory – We need to talk about this
 - NPYM – We would love to share what we’ve done
 - We could also talk about privacy questions
 - Time?
 - Early November would be good