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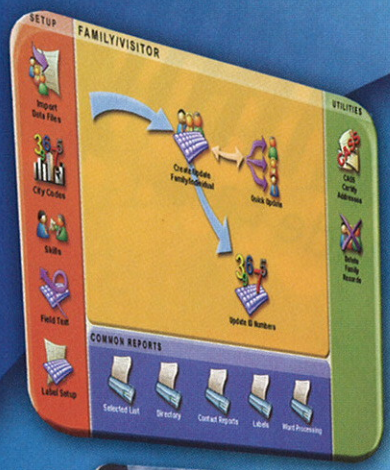

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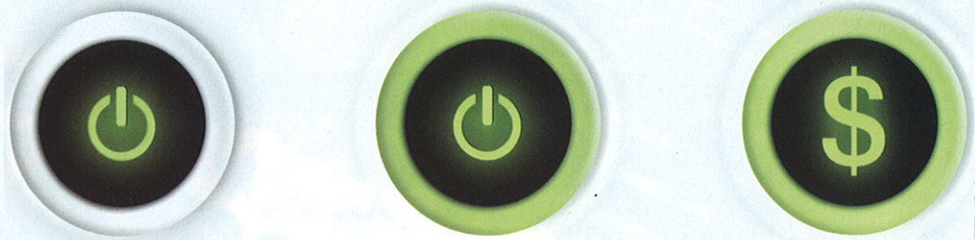

Software As Stewardship

How to Get the Best Church Management Software for Your Money

by RaeAnn Slaybaugh

Your church management software, or CMS, is a big investment. Perhaps no other tool — aside from the employees operating it — can so effectively simplify day-to-day operations at your church.

After interviewing a pool of pastors and church business administrators in preparation for this article, I couldn't help but notice some commonalities in their CMS choices:

They stand by their original selections. Some have only used their CMS programs for two months; others are going on 20 years. All were able to identify shortcomings with their programs; yet, for the most part, they remain loyal. Why?

1. They're familiar with it. Of the leaders I polled, CMS training time ranged from one to six months. That's a decent-size time investment, one which none are eager to repeat ... unless it seems worth it.

2. It holds huge amounts of data. Understandably, they are concerned about having to shift all their information to a new system.

3. It wasn't cheap. CMS represents a significant financial investment. And if you don't get it right the first time, it might seem easier — and definitely cheaper — to stick with what you've got.

Despite these loyalties, however, another trend emerged in my research: Church leaders said they would consider switching their CMS if another program if it:

- Offered overwhelmingly better features;
- Was a better value; and
- Was easier to use.

All these wishes boil down to one word: *user-friendliness*.

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What 'Friendly' Looks Like

By 'user-friendliness,' these pastors and CBA's mean they want CMS that's feature-rich, but not so advanced it's complicated to use. One pastor complains that his program makes him "click through too many windows to find what I'm looking for."

Another says his system falls short in its member-lookup features. "You can't use it to go to the actual record by just clicking on the record," he explains. "You have to get out of the quick lookup area, and then go into the membership record, and then re-type it into the search field, and *then* click 'find.'"

A user-friendly program also cuts down the time it takes to train new employees. This is especially important in positions with high turnover. Unfortunately, these employees often are the ones who use the software most.

Customer service is another important factor. In the event they encounter problems, pastors and administrators want to know they can make a phone call and get help.

History Repeats Itself

Unfortunate as it is, others' mistakes are sometimes the best lessons. Two really stood out:

Mistake 1: Trying to fit a "square-peg" (commercial software) in a "round hole" (a church's unique needs). A worrying number of the pastors and administrators use Microsoft products in their churches, with limited success and a lot of headaches. Their reasons for initially doing so are simple: these programs are well-publicized, readily available and familiar.

In the long run, however, the same problems emerge:

These programs are too easily configured by the end user. This means a ministry could lose some consistency in its terminology and use. As Church Community Builder (CCB) Director of Sales Jim Waters explains, ministry ideas are constantly being suggested to CMS developers. Very often, they're implemented into the program — not just for that user, but for all the others.

Without church-specific accounting functions, it's difficult to track all the funds that are crucial to a church. Proper non-profit fund accounting software automates tracking of all activity in the general fund and restricted funds, explains Dan Smith, national marketing manager for Logos Management Systems. Contribution processing, Accounts Payable and Payroll expenditures all link to the appropriate funds, while general fund activity is also being tracked by departments, ministries or any other desired designations. "This makes budgeting work great for both revenue and expenditure," Smith says.

Using a non-CMS program requires significant manual effort to track all this activity. It also carries the risk of co-mingled funds and money being used in ways other than designated.

You won't properly use your time or reporting power. One administrator uses a non-shared version of Outlook for scheduling and BusinessWorks for accounting. Years later, his IT consultant and accountant are urging new software.

"There's a long list of features that Outlook is missing and are crucial for growing churches, or churches that would like to grow," says Ryan Comingdeer, director of software and support for Five Talent Solutions. Specifically, Outlook doesn't allow an enrollment list; making notes about a person's allergies; online registration for visitors or family friends; the ability to print wrist bands or badges; view reports of activity growth, decline or average demographics.

"Outlook is great for personal appointments and staff meetings," he adds, "but churches really need to use scheduler software that can help the church identify who missed an activity, who the new visitors are, and what's helping the activity to grow or decline."

With regards to accounting functions, this particular administrator's peers are urging him to find a program that's multi-user and features all the normal accounting functions, but with the ability to handle billing for a day school and generate year-end contributions statements. They'd also like remote access to the data, which means it he should be looking at Web-enabled options.

Mistake 2: Relying on 'homemade' software. For three years, another administrator I interviewed has happily

used a program developed by a member of the congregation. He says it took very little time to learn the system since the developer was onhand for training. "It's built just for us," he gushes.

I dislike flooding his proverbial "parade," but there's bound to be trouble ahead. In the interest of good stewardship, there are many good reasons to avoid homemade software programs:

Problem 1: The person who designed it could disappear. What happens when that volunteer runs out of time to maintain his program? Or, what if he or she is forced to transfer cities for a job? Immediately, you've got the equivalent of a beautiful 1967 Jaguar on your hands. You might love it ... but you probably can't work on it.

"In cases like this, a very custom system now needs to be passed to someone else," explains CCB Director of Customer Care Free Grafton. "Tragically, most of the implementations die there.

"The needs of the Church are vast!" she adds. "There are many talented volunteers out there who may have a passion to equip their churches, but the reality is, few volunteers can commit the time to meeting all those needs."

Problem 2: You just don't know what you're missing. The most popular church management systems on the market have taken years — even decades — to build. And the best ones are constantly being upgraded based on user feedback. The odds of one person in one church being able to replicate these efforts just don't add up.

Grafton echoes this sentiment, pointing out that even CMS companies with several full-time developers who work year-round can have trouble staying current with customers' needs.

Comingdeer sums it best: "There's a reason CMS companies exist: They've done the research, they have the right skills, and they've invested thousands of hours and dollars into perfecting their systems."

Problem 3: You're not actually saving money in the long run. Yes, homemade software is often free — and it goes without saying that volunteers' efforts should always be encouraged and appreciated. But just because something is free, doesn't make it good stewardship.

Between maintenance, training and quality, what starts out as a cost-saving endeavor ends up being very expensive, both in terms of economics and staff productivity, Smith explains. "Eventually, the person or staff realizes that for the amount of time they're spending, they could have bought a professional program," he says.

Based on experience, Comingdeer agrees that homemade software is rarely the best choice. "Creating a custom church management program requires a lot of time, knowledge, money and the right technical skills," he cautions. "Many churches who try to do it themselves fail in one or many of these areas."

"Obviously, in the real world, price must always be a factor. But the most expensive software you can purchase is the one you'll need to replace."

Features You Like, Features You Want

To prevent buying the wrong software, only to replace it later, it helps to know which features and functions are favored by your peers in ministry.

Advanced e-mail options. Churches respond very positively to enhanced communication abilities, especially broadcast e-mail messaging to targeted groups and bulk "e-mailings." With the right software, you can even personalize these messages, using the data already in your possession, with very little extra effort.

"The ability for a small group leader to log in and send an e-mail to invite members of their group to a get-together, or being able to start an online discussion for group of interest, lightens the burden on the staff," Grafton explains. "They know they're not the 'bottleneck' to ministry and that their leaders and volunteers can make ministry move forward."

Contribution processing. While many CMS programs have this feature built-in, some offer it online as well. They even synchronize these online donations with donor and fund records for sound bookkeeping practices.

Event registration. The beauty of event registration is that you can know who's going to show up in advance – and sometimes they've already paid. With some programs, people can even select seats and print tickets online.

Other modules also let people schedule rooms on your campus while providing all the necessary forms. This, too, can often be done online.

Facility management. While many churches still rely on paper-based facility scheduling procedures, it takes just one double-booking to prove why you need a more advanced system. In short, a facility management function lets you thoroughly, simply and professionally schedule rooms for events.

(Limited) member access. You probably don't want your members seeing every piece of data in your possession. That's why many CMS programs let them log on and update their personal information — and even automate their giving — with the click of a mouse.

Real-time attendance and giving tracking. Perhaps no other tool will tell you so much about your church's effectiveness than real-time attendance tracking. Aside from saving your staff precious hours during the week, you can know at a glance which ministries are popular and which are struggling.

Additionally, pastors appreciate being able to measure the impact of their sermon series by examining which ones attracted the most people.

The ability to track contributions is equally beneficial. Experts agree that follow-up is crucial to fostering long-time donors. So, the more information you have about who's giving what — and the sooner you have it — the better.

Web access. Many of today's church employees want the security and convenience of desktop software, but want (and need) remote access, too. That's why

some CMS providers now host churches' desktop programs on their own networks.

"We have almost 1,000 organizations for whom we 'host' their software so that it can be run securely from anywhere at any time," Smith explains. "We also provide less full-featured Web-based applications as an option some users prefer."

Meanwhile, CCB designers have made sure Web access is available for numerous reasons: (1) for emergency situations in which staff and lay leaders need to access information, connect with other leaders and members, and take the necessary next steps no matter where they are; and (2) so ministry leaders can enjoy a complete set of tools —article sharing, event planning, message boards, reporting, attendance posting and more — from their home offices.

Additionally, using a Web-enabled product really simplifies CMS upgrades. "When an update is released, there's no program to load onto your computer," explains CCB Marketing Manager Cathy Woodard. "The updates are automatically added to everyone's program at the same time."

Web-based software is also a good solution for small churches without centralized offices. As Comingdeer points out, many church plants don't have a singular physical location where their CMS data resides.

Finally, the Internet is familiar territory to many church leaders and members by now. "People are comfortable surfing the Web already," Grafton says. "Putting the church online was a natural way to extend its influence into homes."

Price Matters — But It's Not Everything

While pastors and administrators are extremely budget-driven, they also know good stewardship doesn't always mean getting the lowest price. Of those polled, not one listed price as the most important factor in his or her software decision.

To Dan Smith, this comes as no surprise: "Obviously, in the real world, price must always be a factor. But the most expensive software you can purchase is the one you'll need to replace."

Church administrators and staff "have a right to good tools," he adds, citing ease of use, long-term cost of ownership, adequate training and support, and up-to-date, expandable features as more important considerations than initial price.

If All Else Fails...

If, after you've done your research, you determine that none of the CMS options on the market perfectly match your church's needs, it's not a dead-end. Actually, it's a starting point.

"If you haven't found what you're looking for in an existing CMS program, find the one that comes closest and request new features to be added," Comingdeer advises. "They'll have the staff to implement the new features, test the software, and properly integrate those them into the rest of the software."

And when you do that, everyone wins — including your peers in ministry.

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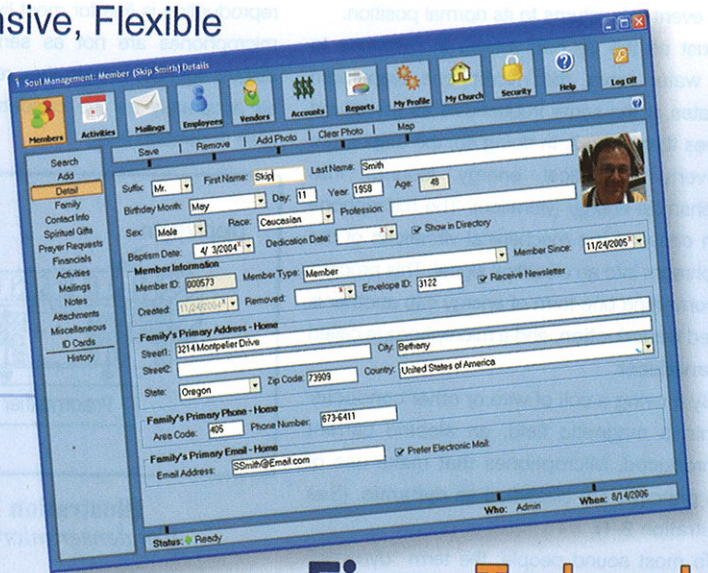

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