

# Information Systems Training

## Professional Practices in Church Administration

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The contents of this document have been written by invitation of the National Association of Church Business Administration for inclusion in a planned NACBA publication focusing on the 14 core competencies of church business administration. This chapter covers the subtopics of Why Train, How to Train, Maximizing Technology Resources, Sources for Training, Review Questions, and a Bibliography.

# Information Systems Training

## Outline

### I. Introduction

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- e. Things to include in a basic training plan for your church.
  - i. Orientation and basic systems training for new hires including pastors.
  - ii. Periodic advanced training.
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  - iv. Professional trainer from software provider one-on-one sessions.
  - v. User group meetings, seminars, conferences, webinars, online courses.
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- a. Suggestions.
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  - iii. Safeguard the data.
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  - v. Take precautions against violating all privacy rights.
  
- b. Policies and procedures should include:
  - i. Rules for internet use.
  - ii. Rules for the proper use and etiquette for email.
  - iii. Rules for personal use and personal data stored on church-owned systems, including email ownership.
  - iv. Software licensing, installation, and support.
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  - vi. Prohibitions for downloading and installing software.
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  - xii. Rules for purchasing hardware and software.
  - xiii. Rules for system use by volunteers and temporary users.
  - xiv. Rules for use of copyrighted material, including digital music.
  - xv. Repairs and maintenance.
  - xvi. Updates.
  - xvii. Rules for power conservation.
  - xviii. Rules for personal websites and blogs, including disclaimers that the views you express are yours alone and do not necessarily reflect the views of your church. It is suggested that these rules be provided and reviewed by legal advisors.
  - xix. Rules for private and public wireless access.
  - xx. Structure, procedures, and workflows for the information management system data entry and data management.
  - xxi. Using common sense.
  
- c. The proper design and use of workflows.
  
- d. The key benefits to using workflows.
  - i. Standardization of processes.
  - ii. Minimization of manual processes.
  - iii. Improvement of data quality in your system.
  - iv. Help you work smarter and faster.

v. Help you push information quickly and efficiently to those who need it.

V. Sources for Training.

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## **Information Systems**

### **Training**

Author and speaker Howard Hendricks said, “If you stop learning today, you stop leading tomorrow.” Essential to the process of information management is the need for learning.

Training is a planned approach to learning knowledge, skills, abilities, and attitudes. It is important to provide and nurture an atmosphere of learning in the context of church information management. The best stewardship comes from having highly trained and skilled ministry team members. Learning and training develops leaders.

#### **Why Train?**

A church office manager once asked, “What if we train our office staff in using our database software and then they leave for another job?” To that question, the Pastor replied, “What if we don’t train them and they stay!” The question of whether to provide training is irrelevant. The imperative is to provide training and do it well. Training requires a commitment of time, funds, and effort. It should be a continual process, repetitive and systematic.

Every year, most organizations budget money for training – over 50 billion dollars in the United States alone.<sup>i</sup> This statistic suggests that successful businesses in America believe in the importance of training. The successful implementation of a church information system is directly related to success in training every user.

There are four reasons why a church should incorporate a training program into their information system business-ministry plan. These four reasons are:

1. Church information systems operations are designed to meet specific needs that only training can provide.

2. To improve or enhance performance.
3. To enhance existing skills, develop new skills, and acquire knowledge.
4. A need for change in the way things are done.

By making this investment in training a church can expect to reduce employee turnover, increase administrative support satisfaction, reduce errors, reduce expenses, save time, enhance ministry, and exercise strategic stewardship.

Changes in technology sometimes require a substantial financial investment. The proper use of these technological advancements will make the church organization function more effectively. Changes in technology also mean that jobs change. By improving the skills of its staff, the church office can keep up with the advances in technology while ensuring that these advances are successfully integrated into the operations of the church.

Training should include fundamental or basic training for entry level staff and advanced training for experienced users. Training should be well planned and rewarding. Incentives should be used to encourage participation. Church staff pastors should not be exempt from such training. Staff members who perform unsatisfactorily because of a deficiency in skills are prime candidates for training. Retraining is becoming mandatory because technology is evolving continuously. Although training is not a total solution to all of your church office and staff performance problems, it can minimize those problems. Surveys indicate that lack of training is a decisive source of frustration and job performance issue. Equipping personnel with the tools and the training to use those tools are essential for information management in the church. An investment in one without an investment in the other is poor stewardship.

The purpose of church staff information systems training is fundamental to the theology of stewardship in ministry. A well trained staff member enables ministry to thrive with the

efficient use of great technological tools for ministry. Information management is a ministry tool. Done well, training enhances the ability of the church to do ministry and fulfill its mission. Learning is a key to continued viability in the face of changing technology, society, and ministry.

Obviously there are costs associated with a good training program. However, don't forget that there are also costs associated with not having a training program. Although more subjective in nature, the indirect costs of not appropriately training church staff can be substantial when productivity suffers. One common misperception that leads to a very expensive struggle is when to change systems. Lack of training can lead to costly decisions to change systems when adequate training could have provided satisfactory solutions without changing systems and providers. Adequate and successful training programs more than pay their own way. Another way to view these costs is to consider them as investments with positive results as a return on investment.

A good training program not only benefits the ministry and work of the church, but it also builds self-confidence in the employee, creates positive peer pressure, enhances levels of jobs, and builds teamwork. Why train? Why would you not train!

### **How to Train**

Regarding information systems in the church, you are what you know. Maintaining and improving the skills of you and your staff are critical to the success of your ministry. Virtually all modern organizations accept that a well-trained workforce is a critical success factor.<sup>ii</sup>

Training professionals use various tools to evaluate and plan for training needs. A simple approach using a gap analysis is a good evaluation and planning tool. A gap analysis is a basic study noting the difference between the skills being utilized and the skills needed and desired. Once the "gap" is defined, then a training program can be designed to remove the gap. Gaps can

be defined as: current skills gap, which is an estimate of training required to bring the existing staff to the level of technical competence required to do the work that must be done now and in the immediate future; turnover or growth gap, which is an estimate of the training required for new staff; and the evolution gap, which is an estimate of the training required as a result of the introduction of new technology, work flows, software, or tasks.

Ever-changing technology provides a growing array of training options. The basic types of job-related training are formal and informal. Informal training includes self study consisting of various on-line tools, written manuals, self-based trial and error, hands-on experience, co-worker instruction, and other forms of study which are less structured. Job-related formal training includes conferences, seminars, workshops, certification courses, and worksite instructor-led training. The best training program for a church support staff probably involves a combination of all of the above.

Research shows employees respond better to in-house trainers because they're familiar with the person and the workplace.<sup>iii</sup> For the purposes of information management, the best practice for your church could be to choose a support staff member who already possesses an appropriate skill set and help them pursue expertise in the information management system utilized by your church. The ultimate purpose would be for this trainer to serve as the resident expert and trainer for the entire church staff. Following this path would maximize the investment of time, funds, and effort for the church. This "resident trainer" may then develop their own internal network of trained church staff along with the appropriate information management policies and procedures to establish and maintain the integrity of the data. If your church is large enough to have an information technology department commonly called an IT department, someone from that department might be qualified to do systems training. Some



church information system vendors have recognized the value of churches having their own systems expert and trainer on staff and offer certification in their systems for this purpose. The ability of your information systems provider to provide fundamental and advanced training in your software should be a consideration when evaluating information systems for your church.

National statistics indicate that employees in secular business receive an average of approximately four days per year of job-related training. For churches, a simple, attainable, and measurable goal is to provide five days of training per year for the church staff. At least fifty percent of this training time should be dedicated to information systems, and even eighty to one hundred percent for staff whose duties involve systems and information critical operations.

In planning fundamental or basic training for entry level staff and advanced training for experienced users be sure to consider the need for making your training systematic and rewarding. Utilize these keys for designing a strategic training program:

1. The objectives of the training must reflect the objectives of the church.
2. The training objectives should be simple, attainable, and measurable. This is commonly referred to as SAM objectives or goals.
3. A training program is not effective unless the skills and / or knowledge level of each participant is assessed prior to their participation in the program.
4. Tailor your training program to the unique nature of your staff and the church office culture.
5. Communicate your goals to the trainees to create a clear understanding and expectations.
6. The training must have a real-life application to the trainee's job, which should be understood by the trainee.
7. Teaching should be done in a way that addresses all different learning styles.

8. Make your training experience interactive.
9. Use incentives and rewards.
10. Monitor and evaluate the program.

The three senses most commonly and most easily involved in training are sight, hearing, and kinesthesia (hands-on).<sup>iv</sup> By including these methods in your training you are using these senses to facilitate learning. Sight methods include the use of manuals, materials, graphic presentations, demonstrations, and simulations. Hearing or sound methods include lecture, discussion groups, question and answer, and media. The use of media where both sight and sound are used is even more effective. These include instructive videos, webinars, and other sight and sound media applications. Hands-on methods include practicing actual job tasks and interactive demonstrations. Some conferences and seminars actually include live computer labs where each attendee either brings or is provided a laptop for hands-on learning. These labs are extremely effective in training. On-the-job one-on-one training is a very effective way to train for specific tasks. The use of practice exercises in all methods reinforces instruction.

A recent study conducted by the Center for Research on Information Technology and Organizations, University of California, Irvine, California, reveals that more than four-fifths of their study respondents have engaged in self-training in the use of work-related computing by using manuals, or 'trial and error,' while only one-third of the respondents have used any type of e-learning (online) during the past three years. Only 5% of the employees surveyed reported no training on work-related computer use during the past three years. These statistics reinforce the importance of enhancing the computer-based skills of the church workforce. They also point to the need for more organized methods of formal training. Also relevant is the fact that the smaller the organization the more likely the worker has to rely on self-help training methods. This

enforces the need for the churches to choose an information system software provider that has a proven training department with multiple opportunities and options for training for your church personnel. The referenced study also shows that online computer training is the method more likely to be used by those in management and professional jobs, in comparison to administrative support jobs where formal training provided by another person is more likely. This supports the premise stated earlier that the use of professional trainers provided by the systems software provider and a “resident staff trainer” serving in another employment role on the church staff would be the most effective means of training the support staff. While the support staff employee may be able to decide whether or not to participate in training, the staff leadership should determine the methods used to train its support staff and whether or not it should be required.

In actual practice a church should establish a training plan that should include:

1. Orientation and basic systems training for new hires and new pastoral staff conducted by an in-house expert. Information systems orientation and basic training can easily be combined with new employee human resource orientation.
2. Periodic advanced training for existing system users either by an in-house expert or a professional trainer.
3. Specialized team training based on functions of the system. This training could be done on an as-needed basis with teams of one to three people probably by an in-house expert.
4. Periodic one-on-one sessions with a specialized trainer from the systems provider.

5. Provision of resources for staff to attend periodic user group meetings, seminars, conferences, webinars, and online courses. Some of these training opportunities also offer continuing education units of credit for certification purposes.
6. Special quick as-needed training sessions to introduce new versions and updated features of the system once they are installed and ready for use probably conducted by an in-house expert. This type of session can be easily handled in a regularly scheduled staff meeting.
7. Policies and procedures for data management.

### **Maximizing Technology Resources**

Due to the fact that logic is the basis for technology, logic might lead one to assume that adapting from one form of technology to another should only require a shift in paradigm. However, since not everyone shares the same sense of logic this is a flawed perspective. Technology is great when it works, and frustrating when it doesn't. The real challenge in the church is how to make technology work for you.

The swift change in technology of the late 20<sup>th</sup> century has both changed and challenged the workplace. It has created both efficiencies and opportunities that were unthinkable a few years ago. However, the ability of the workplace to incorporate such technologies often lags behind the pace of development. This presents an opportunity for the church workplace to maximize available technology resources.

Here are some suggestions for maximizing the use of technology in the church workplace:

1. Provide training and continuing education for your personnel. This is the topic of this chapter.

2. Establish a feedback system. Those who direct the work of the administrative support team in the church office should regularly solicit feedback regarding the use of technologies in the workplace.
3. Safeguard the data. Take the necessary steps to identify confidential and proprietary data and institute policies that will protect and limit access to such information. These policies should minimize the risk of sabotage, theft, or inadvertently publicized information.
4. Establish information system policies, procedures, workflows, and best practices. Specifically address policies for email, voice mail, and other communications. Policies should address appropriate content guidelines and clarify the church ownership of all information stored on the church information systems, including emails. Workflows should define and map mission-critical processes for the church information management system.
5. Take precautions against violating all privacy rights. The church should publicize its policy that all communications over employer-provided systems are to be made for business purposes only, and employees should have no expectation of privacy regarding such communications. Also the church should state in its policies that it retains the right to access and monitor all communication. Appropriate safeguards should be exercised for the privacy of personnel records. There are numerous legal criteria regarding privacy, rights, and information security. Legal and risk assessment audits are always a good way to insure that your data is handled decently and in order.

As has been stated, process, policies and procedures are essential elements to maximizing technology resources in the church workplace. Policies for church staff training should be

included in the personnel policies manual or handbook. Information systems best practices and guidelines should define the fine balance between empowerment and liability. Best practices for using the information system should be carefully studied and documented. At a minimum, such policies and procedures should address topics such as:

1. Rules for using the internet responsibly.
2. Rules for the proper use and etiquette for email.
3. Rules for personal use and personal data stored on church-owned systems, including email ownership.
4. Software licensing, installation, and support.
5. Hardware standardization, configurations, and support.
6. Prohibitions for downloading and installing software.
7. Prohibitions for personal software on church systems.
8. Statement of church ownership of all system components including software.
9. Rules for use of security passwords and logins.
10. Privacy of information.
11. Rules for file management and file sharing.
12. Rules for purchasing hardware and software.
13. Rules for system use by volunteers and temporary users.
14. Rules for use of copyrighted material, including digital music.
15. Repairs and maintenance.
16. Updates.
17. Rules for power conservation.

18. Rules for personal websites and blogs, including disclaimers that the views you express are yours alone and do not necessarily reflect the views of your church. It is suggested that these rules be provided and reviewed by legal advisors.
19. Rules for private and public wireless access.
20. Structure, procedures, and workflows for the information management system data entry and data management.
21. Using common sense.

The church's mission-critical business processes depend on information technology performance from end to end. Another best practice in maximizing technology resources and performance in the church office and organization is to design and utilize efficient workflows. A workflow is a term used to describe a process of steps to accomplish a task. For information systems, a workflow system should be designed to automate the church information system's data processes, without changing the way the church staff does church business. Workflows should define how data is entered and maintained in the church information data management system. Workflows should guide regular tasks such as the weekly follow-up system for new or repeat worship service visitors. Workflows should be clearly defined, mapped, and updated regularly. Every critical procedure, process, task, and function should be guided by an identifiable workflow. Software is available to assist in the design of workflows. Some church information management systems also incorporate workflows into their software to further automate tasks such as contact management, volunteer tracking, and reporting. Ultimately, workflows will define and determine how the technology resources of the church organization are used for ministry.

The key benefits to using workflows are:

1. Standardization of processes.
2. Minimization of manual processes.
3. Improvement of data quality in your system.
4. Help you work smarter and faster.
5. Help you push information quickly and efficiently to those who need it.

In summary, the maximization of technology resources achieves stewardship, promotes collaboration and teamwork, encourages innovation, and provides for the integrity of the data.

### **Sources for Training**

Multiple training options are available for information systems training. The most important function of the church information system is the proper use of the software. Many church information system vendors have professional training departments whose mission is to train churches and ministries in the best use of their software. These training departments offer various types of training opportunities including one-on-one online sessions, webinars, regional seminars, local, national, and international user group meetings, online institutes, self-help documentation and videos, whitepapers, online communities, newsletters, podcasts, and onsite trainers. Church technology providers also provide personalized training for specialized products. Such specialized products include mass mailing software, telecommunication hardware, barcode technology, ID systems, biometric finger print hardware and software, secure check-in hardware and software, check and offering envelope scanners, Check 21 automated clearing house processing, bank electronic deposit software, and other technology enhancements. They also provide their own professional trainers and consultants who provide onsite training and consultation services.



Business application training is available in multiple venues and types. Many companies whose primary business is to train for business applications have training centers in larger cities. Multiple options are available for class attendance or online instruction. Professional freelance business application trainers and consultants are another option. These professionals can provide excellent one-on-one assistance and on-site seminars for your entire support staff.

Larger churches have invested in setting up training labs for the purpose of conducting regular periodic training for church staffs. The church IT staff and staff trainer can then easily conduct training sessions per their training system design.

Other training venues and opportunities are available through various denominational headquarters. Professional organizations such as the NACBA also offer training opportunities online and on a local, regional, and national level. Numerous articles and resources are also available.

In summary, information system training is critical to the success of carrying out the mission of the church. The “why” and “how” of training is well documented. Good training programs are attainable for every size church. Statistics prove the stewardship of training in maximizing the value of the church information system. Multiple sources exist for training available to every size church.

### **Suggested Review Questions (Answers)**

1. What are the four reasons that a church should incorporate a training program into their business-ministry plan? (1. The church information systems operations have a particular need that only training can meet; 2. To improve or enhance performance; 3. To enhance existing skills, develop new skills, and acquire knowledge; 4. A need for change in the way things are done.)

2. What results should a church expect from the investment they make in a training program? (To reduce employee turnover, increase administrative support satisfaction, reduce errors, reduce expenses, save time, enhance ministry, and exercise strategic stewardship)
3. T or F: Due to the continual evolution of technology, training and retraining should be mandatory. (T)
4. T or F: Lack of training is not a factor in support staff job satisfaction. (F)
5. T or F: Training enhances the ability of the church to fulfill its mission. (T)
6. T or F: Secular business in the United States recognizes training as a critical success factor. (T)
7. T or F: Employees respond poorly to in-house trainers due to excessive familiarity. (F)
8. National statistics indicate that employees in secular business receive an average of approximately \_\_\_\_\_ days per year of job-related training. (4)
9. Name two keys for designing a strategic training program. (any two of the ten)
10. T or F: Self training methods such as the use of manuals and 'trial and error' are widely utilized and point to the need for more formal training methods. (T)
11. Name two things a church training plan should include. (any two of the seven)
12. Name one suggestion for maximizing the use of technology in the church workplace.  
(any one of the five)
13. Name two rule topics that should be included in a policies and procedures document.  
(any two rules of the twenty one topics)
14. A \_\_\_\_\_ system should be designed to automate the church information system's data processes. (workflow)

15. What is the most important function of the church information system? (proper use of the software)

16. Name three sources for training. (any three of the multiple sources mentioned)

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<sup>i</sup> (Biech 2005, 9)

<sup>ii</sup> (Dunkle 2005, 1)

<sup>iii</sup> Business, C. F. (2008, December 16). *Go2*. Retrieved December 16, 2008, from <http://www.go2hr.ca/ForbrEmployers/TrainingDevelopment/AssessingTrainingNeeds/TypesofTraining/tabid/135/Default.aspx>

<sup>iv</sup> (Mitchell 1993, 29)

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Before joining Shelby Systems in 2007, Ron Chandler served as a church administrator for 30 years. He was the Pastor for Administration at the Germantown Baptist Church in the Memphis, Tennessee metro area, where he served for the last 24 years of his church ministry. He continues to serve as a church administration consultant, conference speaker, and writer. His pre-ministry business background includes accounting and auditing for various companies. Ron is the author of **Thy Kingdom Clean**, a popular NACBA Press resource for over 15 years. Most recently he has written for the 2009 NACBApress publication, **Professional Practices in Church Administration**. In 2002 he founded the popular website, [www.churchadminpro.com](http://www.churchadminpro.com), a website for church administration resources, used widely by volunteers and professionals. Ron was the 2002 recipient of the NACBA Maurice Saucedo Award, the 2006 recipient of the Southern Baptist Taylor Daniel Award, and a 2008 inductee into the SBCBAA Hall of Honor. He has been a member of the NACBA since 1986, FCBA certified in 1990, has served as the president of the Southern Baptist Church Business Administration Association. Ron is married to Renee and they reside in Germantown, TN. They have two grown daughters and one granddaughter.

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