

Options for UUCMC Church Management Software

March 2011

Current environment at UUCMC

Congregation Database	Data on Google Documents accessed by PC client program; also requires Excel and Word	Maintained by a volunteer member
Email Communications (outbound)	Constant Contact for broadcast email and RE email	Maintained by staff
Events Calendar	Google Calendar (integrated into the website)	Maintained by staff
Website and Staff Email	Commercially hosted	Maintained by a volunteer member
Document Storage	Public – website Private – Google Sites	Maintained by staff
Electronic Giving	Vanco service	Maintained by staff
Accounting	Quickbooks	Maintained by staff
Payroll	ADP service	Maintained by staff

Why look at options?

- The current database allowing multiple users to access data was put in place 6 years ago when commercially available church management software* was generally single user.
- Much church management software has since evolved to support multiple users accessing Internet-based servers.
- Commercially available church management software includes on-going professional updates, maintenance, and support.
- Much commercially available church management software also integrates events calendar, email, website, and more.

*or “church management system”

Range of functions of Church Management Software

- Congregant information – contact, skills and interests, engagement (groups and activities)
- Pledges and contributions – tracking, statements, electronic giving
- Religious Education – class registration, communication, attendance, history, documents
- Events – scheduling, communication, resources, tasks, volunteers, registration, attendance
- Committees (ministries) – meetings, communication, documents
- Website – content management, calendar, forms
- Back office – staff email, accounting, payroll

The Church Management Software market

- Lower Tier - Systems offering basic functions to manage congregant information, contributions, and groups/classes. Some include calendars and event management. Some integrate accounting and payroll but feedback suggests these functions are generally of low value within ChMS.
- Higher Tier - Systems which focus heavily on processes for assimilation and engagement offering a wide range of features and tools to maximize congregant connection to ministries. Companies providing these systems are more directly engaged and collaborative with their client churches.

Candidate systems

Commercially available church management software supporting multiple users with Internet-based data storage:

Lower tier	Congregation Builder	www.congregationbuilder.com
	PowerChurch Online	www.powerchurch.com
	ChurchDB	www.church-db-software.com
	IconCMO	www.iconcmo.com
	ACS OnDemand	www.acstechnologies.com
Higher tier	Kingdom Tools	www.kingdomtools.com
	Connection Power	www.connectionpower.com
	Church Community Builder	www.churchcommunitybuilder.com
	FellowshipOne	www.fellowshiptech.com

Assessment process

- Requirements were gathered from current UUCMC users.
- Information was obtained on all candidate systems and compared against the requirements.
- Feedback from other UU congregations was reviewed. This covered four systems: PowerChurch, IconCMO, ChurchDB, and ACS.
- Also reviewed feedback from other churches (non-UU).
- Based on initial assessment, four demonstration systems were evaluated: PowerChurch, IconCMO, ChurchDB, Kingdom Tools.
- See slide 21 for observations and feedback on the other systems.

Common features

Common features of the current database and the four candidates (PowerChurch, IconCMO, ChurchDB, Kingdom Tools):


- Maintain information on congregants organized by households/ families including retaining data on inactive households.
- Assign congregants to groups.
- Record and track pledges and contributions and issue statements to congregants.
- Generate a variety of reports from the data.
- Data is stored on an Internet-based server.
- User access is password protected and each user is assigned specific permissions regarding which data can be viewed or edited.

Feature comparison (1 of 3)

	Current DB	PowerChurch	IconCMO	ChurchDB	KingdomTools
User interface	PC client + Excel/Word	PC/Mac client	Browser	Browser	Browser
Congregant access	No	No	Yes	Yes 	Yes
Pictures / Picture Directory	No	Yes	Yes	Yes	Yes
Associate child with second household	Yes	No	Yes	Yes	Yes
Confidential notes	No	No	No	Yes	Yes
Customizable fields	Very limited	Limited	Limited	Very limited	Extensive 
Religious Education	Classes	Activities	Groups/Events	Classes 	Groups/Events
Group/event attendance	No	Yes	Yes	Yes	Yes



Feature comparison (2 of 3)

	Current DB	PowerChurch	IconCMO	ChurchDB	KingdomTools
Email (outbound)	Statements*	Individual, Group, Statements*	Individual, Group, Statements	Group (text only), Statements	Individual, Group
Synchronize with Constant Contact	No	Yes	Yes	No	No
Form letters	Yes	No	No	Yes	No
Online forms	No	No	No	Predefined	Custom
Custom reports	No	Yes	No	Limited	Yes 
Generate PDF	No	Yes	Yes	Yes	Limited
Integrated electronic giving	No	No	Yes-Vanco	Yes-USAePay	No
Accounting interface	Export to Quickbooks	Integrated	Integrated	None	None

*Requires separate SMTP email account

Advantage



Disadvantage



Superior

Feature comparison (3 of 3)

	Current DB	PowerChurch	IconCMO	ChurchDB	KingdomTools
Events calendar	Yes-building use	Yes-multiple	No	Yes-public/ private	Yes-multiple
Synchronize with Google Calendar	Yes	Yes	No	No	No
Resource management	No	Yes	No	Yes	No
Event management	No	Yes	No	Yes	Yes
Volunteer/task management	No	Yes	No	Yes	Yes
Integrated website and file storage	No	No	No	No	Yes
Staff email	No	No	No	No	Yes
Payroll processing	No	No	Yes	No	No

Advantage



Disadvantage



Superior

Scope of integration

	Current	PowerChurch	IconCMO	ChurchDB	KingdomTools
Congregation Database	Google Docs*	✓	✓	✓	✓
Email Communications	Constant Contact	Constant Contact*	Constant Contact*	Constant Contact	✓
Events Calendar	Google Calendar*	Google Calendar*	Google Calendar	✓	✓
Website and Staff Email	Hosted	Hosted	Hosted	Hosted	✓
Document Storage	Google Sites	Google Sites	Google Sites	Google Sites	✓
Electronic Giving	Vanco	Vanco	Vanco*	USAePay*	Vanco
Accounting	Quickbooks	✓	✓	Quickbooks	Quickbooks
Payroll	ADP	ADP	✓	ADP	ADP

Covered by ChMS
 ✓ Implemented within ChMS
*Integrates with ChMS

Why choose PowerChurch

- Integrated view of family information and contributions
- Calendar with event, resource, and task management; synchronization with Google Calendar for public view
- Integrated accounting

Concerns:

- Use of PC client is cumbersome and precludes congregant access
- No integration for electronic giving

Bottom line: Suitable system but limited enhancements vs. current

Why choose IconCMO

- Clean, simple interface for congregant access
- Integrated electronic giving with Vanco
- Integrated accounting and payroll
- In business for 19 years and actively courts UU congregations

Concerns:

- Very little customization possible
- Lacking event and volunteer management

Bottom line: Good fit with current environment but limited upside

Why choose ChurchDB

- Excellent handling of Religious Education classes
- Simple, relatively intuitive web interface
- Calendar with event, resource, and task management; private and public views
- Congregant access includes sign up for events, classes, groups
- Integrated electronic giving with USAePay
- UU congregations report that company is very responsive

Concerns:

- Custom reports do not include RE or contributions
- No accounting functions or export to Quickbooks

Bottom line: Solid, usable system which is a good fit for UUCMC

Why choose Kingdom Tools

- Customization! Database and reports can be extensively and easily customized.
- Ministry-based structure makes this a tool for broad use across the congregation.
- Fully integrates website, calendar, file storage, and email.

Concerns:

- Broad scope and high flexibility require more training and configuration
- Cannot directly email statements
- No accounting functions or export to Quickbooks

Bottom line: Sophisticated tool with much broader application

Costs

	PowerChurch	IconCMO	ChurchDB	Kingdom Tools
Initial setup	\$99	None	\$125	\$500 - \$1,000
Data conversion	Fee (tbd)	Fee (tbd)	Fee (tbd)	Part of setup
Annual fee	\$455 (two concurrent users)	\$556** (up to 750 households*)	\$840** (up to 700 families*)	\$900 (up to 500 attendees)
	\$730 (four concurrent users)	\$616** (include payroll)	\$1,020** (include calendar)	
Integration	Replaces Quickbooks	Replaces Quickbooks and ADP	Replaces Google Calendar and Vanco	Replaces website, Google Calendar, Google Sites, Constant Contact, and staff email

*Inactive households/families are also counted

**Additional fees apply for Vanco or USAePay electronic giving

Next steps

- The choice of church management software needs to be led by the staff in conjunction with their lay leader counterparts.
- The current database system remains supported with some enhancements possible so a near-term decision to change is not critical.
- ChurchDB is a very good choice in terms of capabilities, usability, and fit for UUCMC. It has been well received by and responsive to other UU congregations.
- A more comprehensive “ministry” system such as Kingdom Tools offers a higher level of integration and could serve as a valuable tool across the congregation. Introduction of such a system would require greater training, configuration, and leadership engagement.

Moving to a new system

To minimize impact on RE and accounting, a system changeover should take place during the summer

May

- Selection of new system

June

- Subscription starts with system provider
- General system setup and configuration
- Existing data converted by system provider
- Training for UUCMC users

July

- New system goes live

Additional Information

Observations and feedback on other systems

- **ACS OnDemand** - Offers extensive functionality but is expensive and better suited for larger churches. Feedback from congregations is critical of older technology base.
- **Congregation Builder** - Basic functionality but more limited than other systems.

The systems below are full featured with good feedback. Stronger focus on assimilation and engagement processes. Collaborative approach with clients. These companies are Christian-based and most often come up in the context of Christian megachurches. All have been in business 7+ years with large customer bases.

- **FellowshipOne** – Regarded as “gold standard”. Works very hard to insure that churches that use their product get the most out of it. Report library is extensive and has unique features in how giving and attendance can be displayed. The features are cool in theory but not always user friendly. Very complete but very pricey.
- **Connection Power** - Primary focus and strength is on assimilation, that is, taking people from an unattached visitor to someone who is fully plugged into the ministry of the church. Amazing value for what it offers but downside is limited support to get up and running with their system. *However, they have been unwilling to work with some UU congregations.*
- **Church Community Builder** – Very mature, robust, and forward looking. The forms are totally customizable and very powerful. Good tools to support groups. Somewhat cumbersome interface. *However, their Terms of Service state that they may refuse to work with those who are not Bible believing Christian churches and UU congregations report being turned away.*

Bottom line: Not recommended to further consider these systems

Sample screen – PowerChurch

The screenshot displays the PowerChurch Plus 11.1 - DEMO software interface. The main window is titled "Integrated Data Entry" and shows a form for entering household information. The household key is "Adams" and the first name is "Brian and Linda". The mailing name is "Brian and Linda Adams & Family" and the mailing category is "Regular Attender". The address is "931 Sharon Lane" in "Asheville, NC 28801". The home phone number is "(828) 555-9221" and the 2nd home phone number is "(828) 555-9222". The address is marked as "Primary". The salutation is "Brian, Linda and Family". The family email address is partially visible. The family website is also partially visible. There is a checkbox for "Use address" which is checked.

Below the household information, there is a "Maintain Personal Profiles" window. The personal profile is for "Adams, Brian". The profile information includes: Title (blank), First Name (Brian), Middle (blank), Last Name (Adams), and Suffix (blank). The preferred name is blank. The salutation is "Brian". The name format is set to "Given". The personal status is "Regular Attender" and the directory sequence is "1". The marital status is "Married". The envelope number is "101". The adult status is "Y (Y/N)". The male/female status is "M (M/F)". The birth date is "01/14/1953" and the confirmed date is blank. The married date is "02/14/1974" and the baptism date is "08/12/1968". There are also fields for "Date 9", "Date 10", and "Date 11", all of which are blank.

Sample screen – IconCMO

The screenshot displays the IconCMO web application interface. At the top, the logo 'ICON CMO' is on the left, and the text 'Welcome UU Congregation of Monmouth County' is in the center. On the right, there are links for 'getting started', 'help!', 'Log Off', and the date '03/03/2011'. A left-hand navigation menu lists various categories: Organization, People, Households, Members, Groups, Talents, and General Attendance, each with sub-links. The main content area is titled '(Not Active) People : Members : Mem-List'. A modal window titled 'Members' is open, showing a table of members for 'The Agler's' household. The table lists 'Diane' (Age 92) and 'Donavan' (Age 88). Below the table, a form for 'Diane' is displayed in 'In change mode'. The form includes fields for Title (Mrs.), First Name (Diane), Middle Name (Janit), Last Name (Agler), Preferred, Maiden Name, Mail To (Mrs. Diane Agler), Status (Prospect), Status Date (00/00/0000), Relationship (Wife), Gender (Female), and Head of Household (checked). There are also buttons for 'Save Member', 'Clear Fields', 'Refresh Data', 'Delete Member', 'Go To Member List', and 'Go To Household'. A 'View' dropdown is set to 'Select an Item', with links for 'Print Envelope' and 'Print Member Census'. A note states: '* To view an item such as Special Events, Phones, Emails, etc. Select the item above.' At the bottom left, a status bar shows 'Transferring data from secure1.iconcmo...'.

Organization

People

Households

- Hse-List
- Hse-Notes
- Hse-Pictures
- Hse-Reports
- Hse-Export
- Visitation

Members

- Mem-List
- Mem-Notes
- Mem-Pictures
- Mem-Reports
- Mem-Export
- Archives

Groups

- Grp-Households
- Grp-Members
- Grp-Reports
- Grp-Export

Talents

- Tal-Maintenance
- Tal-Reports
- Tal-Export

General Attendance

- Attendance
- Att-Reports

Contributions

General-Ledger

Banking

AR

AP

Payroll

System

Web-Services

Welcome UU Congregation of Monmouth County

getting started help! Log Off 03/03/2011

(Not Active) People : Members : Mem-List

Members

In change mode

The Agler's

Members	Age
Diane	92
Donavan	88

End Of List

Title: Mrs. First Name: Diane Middle Name: Janit Last Name: Agler

Preferred: Maiden Name: Mail To: Mrs. Diane Agler

Status: Prospect Status Date: 00/00/0000 Relationship: Wife Gender: Female Head of Hsehd:

View: Select an Item Print Envelope Print Member Census

First Language: English Second Language: Spanish Denomination: Christian

Save Member Clear Fields Refresh Data Delete Member Go To Member List Go To Household

* To view an item such as Special Events, Phones, Emails, etc. Select the item above.

Transferring data from secure1.iconcmo...

Sample screen – ChurchDB

ChurchDB



Brian Murphy (Church Administrator) of Demo Spiritual Community (Chapel Hill).
Current Family / Member: Ballantine / Dennis Ballantine
Thursday, March 03, 2011 [Logout](#)

[Help](#) | [Search](#) | [Family](#) | [Privacy](#) | [Life Passages](#) | [Emergency](#) | [More](#)

[Back](#)

Membership
View Family Member
(If the text is not completely visible in the field you may click on it and use left and right arrow keys to scroll.) Items in boldface with an asterisk (*) are required fields. Family ID: 824002

* Head of Household:	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Child <input type="radio"/> Adult	* Gender:	Male
* Title:	Mr.	? * Language:	Primary English 2nd
* First Name:	Dennis	Middle Name:	
? Preferred Name:		Suffix:	
* Last Name:	Ballantine	Maiden Name:	
Marital Status:		Marriage Date:	
Family Relation:	Single Adult		
T-Shirt:		Date of Birth:	1/1/1955 (mm/dd/yyyy)
Religion:	Unitarian-Universalist	Ethnic Type:	
Occupation:		Employer:	
Business Address:		Business Addr: (2nd Line)	
Business City:		Business State:	Zip Code:

Demo Spiritual Community (Chapel Hill)
Use Active Email Address for:

Active:	db@aol.com	? <input checked="" type="checkbox"/> General Church eMailings
? 2nd Address:		<input checked="" type="checkbox"/> Education
? IM Address:		

Grade:		as of the:		Fall Semester	at	(school)
Education:	Bachelors Degree	as of:	1962 (year)		at U of Mn	(school)
Deceased:	<input type="radio"/> Yes <input type="radio"/> No	Date of Death:		Cemetery:		
			(mm/dd/yyyy)			

Family US Addr: Yes ? Use Family Street Address Use Family Mailing Address ? Indv US Addr: Yes No

Street Address:	123 Home Lane	City:	Eden Prairie	State:	MN	Zip:	55441
Street (2nd line):							
Mailing Address:	123 Home Lane	City:	Eden Prairie	State:	MN	Zip:	55441

Sample screen – Kingdom Tools

Welcome Admin
March 03, 2011 [01:52pm]

UU Congregation of Monmouth County

Desktop | Web | Schedule | Mallman | People | Groups | Ministries | Tasks | Attendance | Reports | Contributions | Files | Podcasts | Security | Forms

Ministry: Home Need Help?: [] Go

> Search >

Individual Contacts >> [] Find

Contact Name	Home Phone
Admin, Admin	
DeBeer, Liz	
Jarocho-Ernst, Virginia	
Kingdom Tools,	1(866) 967-9001
McKenzie-Creech, Michelle	
Murphy, Andrew	
Murphy, Brian	
Riordan, Maggi	
User, Trial	

<< New Contact 9 Contacts

Murphy, Brian

Profile Groups Contributions Notes

Personal Attributes Alternate More Info Family

[Edit](#) [Security](#) [Edit Tab Fields](#) - Choose a form - [Fill Out](#)

Updated: 03/03/2011 12:59pm | Attended: | Donated: 03/02/2011

Image: [No Image]	Affiliation: Active Member
Title: No Value	Date Created: March 02, 2011
First Name: Brian	Total Times Attended:
Middle Name:	
Last Name: Murphy	Home Address:
Preferred Name:	Home City:
Age:	Home ST/Province:
Primary Family: Murphy	Home Postal Code:
Family Relationship: Head of Household	Home Country:
Envelope Number:	Inherit From Family:
Checkin Group: No Value	
Allergies:	Gender: No Value
RFID Tag:	
Receipts: 1	Marital Status: No Value
	Anniversary (If Married):
E-mail Address: bpmurphy7@gmail.com	
Receive Mailouts: No Choice	Birth Date:
SMS Address:	

References

- ChMS Provider Websites (see slide 6)
- UUA ChurchMgmtSoftware list (<http://lists.uua.org/mailman/listinfo/churchmgmtsoftware>)
- Community Church of Chapel Hill Unitarian Universalist (<http://c3h.wikispaces.com/>)
 - ChMS Evaluations (<http://spreadsheets.google.com/pub?key=p607Rj7TS3gxfwxzuiGAcNg>)
- First Church Unitarian, Littleton, MA
 - UU Church Mgmt Software Survey 2009 (http://fculittle.org/tempdocs/CMS_Survey_Results_2009.pdf)
- High Desert Church (<http://www.highdesertchurch.com>)
 - ChMS Software Research (<http://transformingrenewal.blogspot.com/2008/10/chms-summary.html>)
- Christian Computing Magazine (<http://www.ccmag.com>)
 - ChMS Overview 2010 (<http://www.ccmag.com/page/index.php?pageid=16&articleid=363>)
 - ChMS Feature Chart (<http://www.ccmag.com/cms/index.php?chartid=1>)