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Planning Center Church Management

Planning Center is a set of applications we use to manage our church ministries. It has several independent modules and we pay a monthly subscription fee that is based on the level of usage we have for each module. The core module, People, is "free" on an unlimited basis, when any other module is purchased. Planning Center is Internet-based (cloud based), and all backup and restoration procedures are maintained by the provider.

Services Overview

The Services module is used to plan our worship services. The subscription level is primarily determined by the size of our contemporary music team, vocal and instrumental.   Within this application we schedule the individuals who are required to suppo9rt the worship service, and to communicate the details of the worship plan, such as the music selections. Though we could use the application to schedule all personnel, including the traditional music team, ushers, and technical support, we currently only use it to schedule and communicate with the Contemporary music team.

Within services is a music library function, within which we have stored the lyrics and chord charts for all of the contemporary music we have performed. There is also a function which does automatic reporting of the usage of contemporary music, and to communicate this to the licensing service we use.

The primary administrator of the Services application is the Contemporary Worship Director.

Services administration is primarily done using a Windows workstation, but member access is primarily done through the mobile application, Services, which is available for Apple and Google users.

Calendar Overview

The Calendar application is primarily used by the Church Administrator to keep track of all meetings and group activities which require church resources, especially for facility usage. There is a function in the Calendar application to track the usage of rooms and for other resources, such as media equipment.

The Calendar application requires a subscription fee, which is determined by the number of rooms which are reserved in the application. We currently use the lowest subscription level, which is for ten rooms, and we have all of these assigned.

The Calendar application receives "feeds" from the Groups application, so that events which are scheduled in Groups will be automatically sent to Calendar. There is a setting function in Calendar to determine which groups are enabled to feed events like this.

The Calendar application also feeds event information into another form of calendar in the church member application Church Center.   Whether or not an event is sent to the public calendar in church center is determined by a setting on the event in the Calendar application.

So, the information flow is: Group Events -> Calendar -> Church Center Calendar.

Our current process is to schedule events for outside groups, such as AA, directly into the Calendar application, rather than in the Groups application.

The administration for Calendar is primarily done through a Windows workstation, but there is also a mobile application for access.

Giving Overview

The Giving application tracks all funds which come into our church as donations. It offers the capability to assign incoming funds to a specific category, which can then be associated with an account in our bookkeeping application. The Giving application has a module to generate giving reports for our church members, which we do on a semiannual basis.

The design of the Giving application has restrictions to limit it for only tax-deductible contributions, but, we have implemented ways in our data entry procedure to handle some non-deductible donations, and to communicate that on congregant giving reports.

Although the application has the capability to transfer fund information directly into QuickBooks, we don't currently use that capability, as we feel it may be confusing and not practical.

Due to the confidential requirements of the process controlled by Giving, there is very limited access granted for access.

Giving is acquired on a subscription basis, and the monthly cost is determined by the average number of donations entered monthly.

Giving is almost entirely accessed through a Windows workstation.

Checkins Overview

The Checkin application is used to capture bulk attendance for church events, such as worship services and fellowship events. There is also a module to capture named information on Children's events and for functions such as nametag printing and secure checkin and checkout for children to parents and guardians.

We also use Checkins to record bulk attendance for our Group events, so that we can roll up indicators for Study Group, Ministry, and Mission participation by our congregants. These indicators are then recorded on a dashboard in the People application.

We primarily use checkins on a Windows workstation, but there is also a mobile application available for most of the functions.

Groups Overview

The Groups application captures attendance and content information for ministry and mission activities of our church. Groups are created for each type of activity, and, Group members, events, and event specifics may be recorded and communicated through the application.   Through a setting in the Calendar application, specific Groups may feed event information into the master church Calendar, so that event information needs to be entered only once. There is a resource module through which Group Leaders and members may share documents and other information particular to the group.

The Group information is primarily administered through a Windows workstation, but, Group members may access most information on groups in the Church Center mobile application.

The Groups application is offered by subscription, and the monthly cost is determined by the total number of specific members across all groups.

People Overview

The People application is used to capture profile information on all individuals with whom our church maintains relationships. Church members, guests, visitors are all recorded in the application.

The People application has a Lists module which can be used to run fairly complex queries against data captured in all Planning Center applications. Some of these lists are used to roll up the information on activities that we then enter into the Checkins application to present on the Metrics dashboard, which is then viewed in the People application.

There is also a Forms module in People which permits generation of online forms to capture manually-entered information from individuals.

There is no cost for usage of People, as it is included when any other module subscription is put in place.

People is accessible either through a Windows workstation or through the People mobile application.

Church Center Overview

Publishing Overview

Wix Website Management

MediaShout Presentation Software

MediaShout Overview

Microsoft Office 365

Office 365 Overview

Microsoft Office 365 is our source for our key office productivity applications. This includes

>   Word for work processing

>   PowerPoint for presentations

>   Publisher for complex office documents

>   Excel for spreadsheets

>   Outlook for email

We currently use locally-installed versions of all applications, instead of the cloud-based solution, so that all applications are available regardless of network connectivity.

We have a non-profit license for subscriptions, and this is priced per user. For the most part, there is a license for each staff member. Microsoft permits multiple installations for each user. Our current process is to use a license on the primary workstation for the staff member. For some group use workstations, such as in the Sanctuary, or Fellowship Hall, we use the additional installations under the license for some of the users, primarily the technical support staff.

Google Office

Google Mail

Google Files

Google Maps

Intuit QuickBooks

Quickbooks Overview

QuickBooks, from Intuit, is the application we use to manage the financial life of the church. It supports standard bookkeeping principles, including managing payroll and tax situation for employees and contractors.

Currently, our Bookkeeper can work from home with a separate copy of the application, but our license is for a single installation on the Windows workstation in the Bookkeeper's office in the main office building. The primary point of entry is at the Bookkeeper's home, and the backup is done there. On a monthly basis, a copy of the backup is sent to the main office, where it is stored on the local file server. It is also stored

There is a single user id implemented, which is shared by a small number of people who, organizationally, need access to the system.

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