Needs:

-"contribution statements"

-ideally replace Quicken, Excel, and OnPay (ChurchDB less important, though it would be great to be able to easily generate individual pledge reports)

Current Software

-ChurchDB- for tracking pledges: no need to switch- but D'On says better pledge reporting options would be ideal. Per Hank, we currently use ChurchDB for the following:

Maintain a list of member contact and other relevant information

Produce the directory

Maintain email list in select categories

Keep track of pledges, donations and other income

Produce reports of the above including year-end tax reports.

Reconcile green sheets

Produce custom reports

- 180/year (15/month)

-OnPay, for payroll: Agreement that a change would be helpful, primarily due to issue with inadequate support, regular errors

- 480/year (40/month)
- They create our quarterly 941 forms, W2s etc

-D'On's personal Quicken software, for accounting:

- 30/year (D'On pays out of pocket)

Current total software costs: 690/yr

OPTIONS

MinistryTracker

Created "Faithlife" account to trial.

For main Church Management Portal

- Email: mathiasquackenbush@gmail.com

For Member Portal:
- *Email: office@wyeastuu.org*
- *Password: Wy8st4evr*

-Any way to enable online giving for non-members?

- Intuitive tools let you manage budgets, pledge drives, building funds, and more. Track giving and expenses across your whole church, and set up pledge drives separate from your normal budget. Easily track progress and communicate with givers.
- Rated among most user-friendly by Capterra in 2018
- Communications tools
    - Email to select groups
    - Calendar function
- Pledge tracking- easy to track specific funds
    - Easy to enter giving info
    - Has an easy-to-use feature for pledge drives (canvass)
- Easily generate tax statement
- Directory
- 45/month
- Multi-user
    - Cloud based- has admin and member portals
    - As many administrators as desired---> can restrict what info people can access

Call w/Justin 2-18-19
- Maintain a list of member contact and other relevant information ✅
- Produce the directory ✅
- Maintain email list in select categories- easily send to subgroups as needed (e.g. by age, membership status, role)✅
- Keep track of pledges, donations and other income ✅
- Produce reports of the above including year-end tax reports. ✅
- Reconcile green sheets
    - *"From information on the greens sheet Churchdb keeps track of the various categories of funds i.e. Pledges, contributions, special collections, fund raising events etc."*
- Produce custom reports ✅
    - *"I have used custom reports to list people with various attributes like pledgers, members and friends."*
        - Capacity to assign any number of custom tags

-Includes member portal, ability to schedule recurring donations, access to online directory
Can send emails through ministrytracker, including to groups
-Integrated pledge tracking and accounting functions
-easy to automatically email year-end tax reports
-can donate as individual or family
-only ProTex feature is not included

-Acknowledges learning curve- offers training sessions
-open every day 6a-6p pacific time

-As many administrators as desired---> can restrict what info people can access
-Trial extended to 3/25
-All cloud-based

$50/hr for data transfer- usually can be completed in an hour if it can be turned into an xls or csv file

As Linda pointed out Churchdb does not interact with any other email list. Normally, I only keep maintain records on active/contributing members and friends. One feature of Churchdb is I can send emails to subgroups e.g. Seniors, only members, board members etc. based on attributes.

The report I used this year for pledge reporting was "contribution and pledge report" which seems adequate.

From information on the greens sheet Churchdb keeps track of the various categories of funds i.e. Pledges, contributions, special collections, fund raising events etc.

I have used custom reports to list people with various attributes like pledgers, members and friends.

There are some features of Churchdb that have not been explored like egiving, a calendar and resource management.

PowerChurch
- Great feedback from several respondents on UUA email list
- Has membership management, accounting, and payroll for a total of:
  - Online version: 39.95/month for two users
- They would likely be able to convert our member/pledge data for about 275.
- Demo available

- ○ Is accounts payable/receivable relevant for us?
- ○ Does include payroll- may end up being enough
- ○ What's with the anonymity of "envelope number" when tallying contributions? How can we get around that?
- ○ Easy to print a contribution statement
- ○ Export info from mailchimp?

-ability to budget based on church year is essential
-Quicken doesn't give us a good audit trail

Icon CMO-
-accounting+church mgmt in one software (accounting add-on is free)
- ● One respondent from Evergreen UU fellowship expressed disappointment with the payroll function:
  - ○ Doesn't do 941 taxes (quarterly)
  - ○ Also requires doing W2s on your own
  - ○ Records involving social security number must be stored separately
  - ○ Doesn't track sick leave or vacation
  - ○ Possibly less user-friendly
  - ○ They're switching to Paychex at just 27/month.
- ● Evergreen treasurer did note that the pledge tracking function integrates very nicely with accounting
-25-35/month + 25/month for payroll add-on
-unlimited users
-contribution mgmt
-reporting
-14 day trial starting 12/26/18
- ● Phone number: 360-213-3524
- ● Name: Wyeast
- ● Password: **j4gttnk4**

Fund Name:	All Funds		Pledge Range:	$0.00 to $999,999.00	
Date Range:	01/01/2018 to 12/31/2018		Given Range:	$0.00 to $999,999.00	
Status:	Everyone				

Name	Address	City,St Zip	Phone	Pledge for	Given for
				Selected Period	Selected Period
Abar, Anjeneya	1100 32nd Ave S Suite G	Moorhead, MN 56560	(800)236-1899	$1,600.00	$4,154.00
Addler, Cyd	1100 32nd Ave S Suite G	Moorhead, MN 56560	(800)236-1899	$13,000.00	$11,900.00
Administrator, (Deleted)				$0.00	$0.00
Ages, Shannen	1100 32nd Ave S Suite G	Moorhead, MN 56560	(800)236-1899	$5,200.00	$4,300.00
Agler, Donavan & Diane	1100 32nd Ave S Suite G	Moorhead, MN 56560	(800)236-1899	$12,220.00	$12,160.00
Akers, Draven	1100 32nd Ave S Suite G	Moorhead, MN 56560	(800)236-1899	$14,300.00	$11,400.00
Allgaier, Louis	1100 32nd Ave S Suite G	Moorhead, MN 56560	(800)236-1899	$20,980.00	$17,400.00

ChurchTrac

- **No response to request for service in attempt to start free trial**
- 30-day trial
- Payroll
- Budgeting/Accounting/Payroll for an additional $5/month more
- Member/guest followup and tracking
- Access available to members
- Pledge tracking, printable giving statements
- Online giving
- One of Capterra's Top 20 most affordable church management softwares
- $5-10 per month!

-Signed up for free trial under Wy'east UUC, username MathiasQ, password: Wy8st4evr
- Still waiting on response to support request- received error upon attempt to sign up

CDM+Fund Accounting/Payroll
-includes payroll
-10/month for additional licenses
-35 for basic accounting, 20 additional each for membership, fund/payroll, contributions
-easy to use
-60 day trial+demo options

Breeze
-no capacity to track expenses--would require continued use of Quicken
-50/month
-Track giving
-Track donations, report contributions
-Good for small churches
-member data
-Multi-user
-hard to separate visitors out of main list-to investigate further
-online giving and by text
-member access
-emailable giving statements
-printable directories

-mailchimp integration
-user-friendly
-create forms
-free demo company

Aplos- among highest rated and rated best overall by FitSmallBusiness
-has fund accounting- only at 150/month level
-budgeting
-cloud-based
-multi-user support requires paying 79/month
-online payment capability
-free trial available

Flockbase
-two separate membership and accounting "modules"- about 95 each (one-time)
-has payroll option- separate module?
-reports can be printed as PDFs- no way to export to excel