

*Sensemaking, to the extent that it involves communication, takes place in interactive talk....as this occurs, a situation is talked into existence and the basis is laid for action to deal with it.*

*—Karl Weick*

## A process for choosing a web-based church management system: a case study

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### **Introduction**

According to Tony Dye, a “technology evangelist” with Higher Ground Tech, over 200 Church Management Software (ChMS) systems are currently available, with a bewildering array of feature sets, pricing models, and support structures. According to an infographic published by Capterra in 2012, the top five companies alone service almost 150 thousand churches, serving approximately 180 million parishioners (<http://www.capterra.com/church-management-software/#infographic>).

Capterra's e-book, the Smart Guide to Buying Church Software, says churches generally use ChMS to

- Keep track of contributions, memberships and attendance
- Manage schedules for events, classes and services
- Handle accounting, fund management, online giving and budget process
- Manage groups, ministries and volunteers

But many other features are available and many questions must be addressed. Should the system be cloud based? Is the ability to check children into classes on tablets or smartphones needed? Does the system provide or integrate with the church website? Event registration, e-commerce, virtual services—the list of options and opportunities seems endless. One vendor even integrates a church library check out system.

The move to such technologies is driven by larger cultural shifts. Rainie, from the Pew Research Center, told the National Religious Broadcasters in February 2014 that we are increasing a world of “networked individualism.” Three digital revolutions, in her terms, include the growth of broadband, the growth of wireless connectivity, and the growth of social media (Rainie 2014). The expectations of church staff and volunteers will be shaped by their experiences with these technologies.

This case study describes the development of a decision matrix for choosing a ChMS solution. A review of literature discusses how such decisions are made and applies these frameworks to a process outlined as part of the study.

## **Background**

The context for this study is a growing, rural congregation in southern Michigan. The church (CBC) is 75 years old but has experienced rapid growth more recently, averaging between 350 and 400 in attendance. Although historically the congregation has been mostly farmers and non-union tradespeople, for the last five years the congregation has included about 75 college students from two local colleges.

Church governance is a congregational/elder-rule hybrid, founded in the Bible church movement that peaked in the 1960's and 1970's. The movement was grounded in the theology of the Reformation and the rise of Pietism. As a result of the Modernist-Fundamentalist controversies of the early 1900's, some churches elected to break with denominational ties altogether and the independent Bible churches were created in this context.

While many churches in this movement are characterized by older, declining congregations, CBC has experienced steady growth and the congregation has

considerable diversity in age, socio-economic status, and religious backgrounds. The sanctuary seats about 250; during the academic year there are three worship services on Sunday mornings.

Although the church is located several miles from the nearest town, the leadership expects the congregation to grow to 500+ in the next two years, and at least one Sunday recently this number was reached without any special programming or focus.

The church has not been resistant to technology and paid for the development of its own content management system to manage its website before such systems were widely available. For these reasons, the elders have elected to explore how a ChMS might facilitate growth and serve congregants more effectively.

## **Review of Literature**

### **Church Management Software**

Very little academic literature discusses ChMS, although numerous online resources are available. Much of the online conversation is driven by vendors, but a few independent and/or objective sources are available.

In 2007 the Center for Congregations offered grants to provide churches with computers, and their financial officer, Nancy Armstrong, noted that emerging web-based systems would allow congregations to “think in new ways about how they connect with and use information about people (Armstrong 2007). Software as a Service, the model being adopted by most ChMS developers, would allow congregations to tailor solutions to their congregational “personality” and focus on “people care” while reducing network and hardware expenses since the program rests on the vendors’ servers, she said.

Noting these possibilities Vergel cautioned that guidelines should be developed for appropriate use. He writes: “Technology has a tendency to creep into areas where it is not actually needed, displacing human activities that, while seemingly burdensome, are helpful in maintaining a centered focus in life (Vergel 2010).” He argues for a balanced reflection of mission and culture, suggesting that congregations consider

1. Ministering to those who have the least access to technology.
2. Avoiding approaches that cater to perceived needs only to muster popularity.
3. Preventing technologies from becoming indispensable and disruptive of dependence on God.

ChMS vendors and consultants take a more positive view, of course. But independent analysts suggest that the process is complicated. In a series of blog posts in 2011, Dye suggests that the process of weeding through the claims and features of vendors is deliberate and time-consuming. One pastor who blogged his way through the process says he evaluated 22 companies and spent “hundreds of

hours in the selection process spanning a period of four months (transformingrenewal.blogspot.com).

The process Dye outlines includes designating a project leader, securing buy-in from senior management, detailing the weakness of the current system or approach, defining the business objectives (not features) to be achieved, identifying the key decision makers, and polling staff about first and second tier needs for data and tools (Dye 2011).

Even after engaging in a thoughtful selection process, the experience a church has with its ChMS may not be satisfactory. Nick Nicholaou at Ministry Business Services says many of the solutions can be too complex and the user interfaces too challenging and frustrating. Training and support then are key criteria, and church need strict data entry standards and adequate budget for training users (Nicholaou 2011).

Installation and set up have budget considerations as well. Configurations currently available include installing software on an office computer, installing it on a local network, or installing it on the cloud. A hybrid approach combines the last two.

Pricing is also complicated. Many vendor offer tiered pricing, based on the size of the congregation, but set-up fees, training and support costs can add to monthly SAAS expenses. In addition, many vendors do not make pricing available until customers have watched videos, tried demos, and discussed their needs with salespeople, adding time to an already extensive process.

Choosing the right solution is not easy.

### **Sensemaking**

In churches such decision are often be made by a standing committee or a designated team, and the group is given clear goals and processes. Of course this is not necessarily true. Group decision-making is messy: the alternatives to consider are endless and the goals are fuzzy.

A functional perspective suggests that groups act once the problem is analyzed, goals are set, alternatives are determined and evaluated, and a decision is made. In some sense this is true, but Poole argues that this oversimplifies what is essentially a communication problem. In his view the group is developing rules and resources at the same time it is following these rules and using these resources, and the emerging structure is both the medium and the outcome of the groups' efforts (Poole 1992). This process is called adaptive structuration.

In this study, the group choosing the ChMS follows a process but it is making the process up at the same time. Leaders and members must be careful not to be frustrated by the turns and delays which occur, and to listen carefully to each other since members will have varied interpretations of both data and process. Rules and resources will emerge but they will also evolve. The process must adapt to and

adapt the structures developed for making the decision.

This is more important because a church is a loosely coupled organization. In a study of Norwegian church managers, Hernes, following Weick, assumes a substantial autonomy among organizational members and suggest that organizational function is improved by such independencies (Hernes 2007). In these loosely coupled systems Weick's *double interacts* flourish. This occurs when an act elicits a response and the response elicits an adjustment. In most cases the act here is the act of speaking.

Effective committees and task forces function in this way, even in more hierarchal systems including denominational churches. The point of choosing a team or organizing a committee is to insure different perspectives, and as new knowledge or understanding emerges different responses and adjustments ensue.

Given that most committee members will have limited experience with any ChMS, the process of discovery will be largely framed by sensemaking. Weick says sensemaking is about "the interplay of action and interpretation rather than the influence of evaluation on choice." Words become the "springboard" to action (Weick, Sutcliffe, & Obstfeld, 2005). Talk is the action.

The action in view here is a choice about the future, but sensemaking is inherently retrospective. Like Poole, Weick does not believe that problems are clearly understood and alternatives clearly evaluated in traditional decision-making processes. Rather, he writes: "Problems must be bracketed from an amorphous stream of experience and be labeled as relevant before ongoing action can be focused on them (2005)." The bracketing and labeling are accomplished through talk, eventually leading to a plausible rather than "correct" choice, a resolution of the ambiguity that exists when autonomous people seek meaning together.

### **Decision making**

Although sensemaking focuses on the past, it has been specifically related to decision-making in some studies. Boland believes the tension between these approaches is best resolved by what he calls "design thinking" which depends on their complementary strengths. Design thinking "plays competing tendencies of openness and closure off on each other as a source of its energy and inventiveness," he says, suggesting a new approach to management outside the scope of this project (Boland 2008). Central to his argument is the idea that design thinking "brings deadlines and decision requirements into the picture."

Seligman has attempted to relate sensemaking specifically to the innovation – decision process. He relates Rogers Innovation-Decision Process to Weick's seven properties of sensemaking. When a decision is made, for example, the justification is developed retrospectively. "Sensemaking compels the individual sensible action," he says (Seligman 2006).

Choosing a software solution is ultimately an action which requires both the

adaptability recommended by Poole and the ambiguity suggested by Weick. But sensemaking ultimately turns to decision-making and a weighted decision matrix could help finalize the choice.

Matrixes have been used as an aid to making decision about outsourcing, for example, but they are not a substitute for the actual decision, which may have strategic implications beyond the scope of the matrix (Ball 2003). In choosing a ChMS a matrix may help clarify which vendor best meets strategic objectives but does not set the objectives themselves. The matrix cannot substitute for professional and philosophical judgment, but by weighting various criteria it can help account for it.

The Pugh matrix permits a degree of qualitative assessment, through a pairwise comparison of criteria and candidates. Subjective opinions are made more objective and the matrix can be used to decide between a number of alternatives (Burge 2009). Constructing a Pugh matrix consists of five steps:

1. Defining the criteria
2. Selecting a baseline
3. Comparing the options
4. Calculating a score
5. Considering any hybrids

Part of the work of the selection team is to make sure the selection criteria are not incorrect, incomplete or inadequate. Burge suggests that an incorrect criteria is based on the opinion of the team rather than the needs of the stakeholders, incomplete criteria ignores important aspects such as training or maintenance. And an inadequate criteria has too many possible interpretations. "Low cost" could mean purchase costs, running cost, or development costs (2009).

He suggests a team between 4 and 8 with an experienced facilitator. The process may take as few as two or three hours, provided the team understand what they are trying to do, and the selection criteria have been validated and weighted. Exploring various weights for the criteria as part of the process gives the team an opportunity check that the findings are consistent.

## **Methodology**

The process for choosing ChMS in this case study follows the process outlined by Dye and develops instruments for seeking input into the process as well as a matrix for helping finalize a decision. The process is discussed in this section.

### **Designating a project leader:**

The researcher/project leader is an unpaid elder/pastor who teaches web content and management at a nearby university. He has an active social media presence and maintains the church website. He has been a member of the church for 28 years.

### **Securing buy-in from senior management**

The elders have approved identifying a web-based ChMS and outlined key objectives. The final decision is cost sensitive, due to a weak budget cycle.

### **Detailing the weakness of the current system or approach**

No current software is currently in use, although members recently were asked to update contact information in a Google survey.

The church had some experience in the past with a PC based system where data entry was confusing and tracking groups or families was difficult. Data in the system is out-of-date and incomplete.

Currently three of the four pastors and the office manager all use Macs, which are not compatible with the existing legacy system.

### **Defining the business objectives (not features) to be achieved**

The stated mission is “working together to glorify God by sharing His Word and by serving, mentoring and supporting one another.”

The elders have stated the key objectives for a ChMS consistent with this mission:

- Communicate more effectively with members, small groups, and ministry leaders.
- Consolidate contribution records and accounting.
- Improve follow-up with visitors and help identify those members of the congregation who require attention.
- Support safety and security procedures, such as child check-in.

A cloud-based system is preferred to allow volunteers access to selected information. There is no paid IT staff to support a network or hybrid model.

Other primary considerations are training and support as well as cost.

### **Identifying the key decision makers**

A purchase decision would be made by the official board. The board consists of elders and deacons.

Input is being sought from the ministry council, which includes the official board and various program directors.

A team will evaluate vendors and make a recommendation. Members represent the objectives identified by the elders. This team includes but is not limited to:

- Project leader/associate pastor (volunteer)
- Technology director or a designee from his team (volunteer)
- Church treasurer (volunteer)
- Children’s education director (volunteer)

- Associate pastor responsible for follow-up (staff)
- Office manager (staff)

### Seeking input from leadership about first and second tier needs for data and tools

A Google survey was developed and circulated to the ministry council. Additional surveys and interview will be conducted as determined by the project team.

#### Survey:

##### Software features

The following are the basic functions of church management software currently available. Please check the ones you would consider essential if such software were purchased.

- Maintain current information about members of the congregation
- Provide information organized by families, classes, interests and small groups
- Record attendance in classes and other events
- Safe and secure child check-in
- Maintain records of contributions
- Integrate with accounting software
- Schedule resources and facilities
- Maintain schedules and calendars
- Facilitate communication through email and texting.

##### Advanced features.

The following features are available in more advanced systems. Check any which you feel should be included if possible.

- Integration with social media tools like Facebook.
- Management of volunteers—sign up, scheduling, etc.
- Members can update their own directory information.
- Integration with church website.

##### Cost

How important is COST in choosing a software package.

1    2    3    4    5

Unimportant      Critical

Web-based—can be accessed from any computer by volunteers and staff.  
How important is it that this software be web-based?

1    2    3    4    5

Unimportant      Critical

Service and training.

How important the vendors reputation for service and training in choosing a software package.

1 2 3 4 5

Unimportant      Critical

At this time, which is the MOST IMPORTANT from your perspective

- Cost
- Service and training
- Web-based

Please state any questions or concerns about how we might collect and manage information about our congregation.

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The team will narrow its choices down to five or six vendors, based on the recommendations of consultants, pastors of similar size churches, and Capterra. Then the team will refine a matrix to help choose a vendor.

## Conclusion

This case study has outlined a process for choosing a web-based church management system (Dye 2011.). It also reviews the literature relative to these systems as well as communication theories and models for group decision making.

The selection of a team to make this decision on behalf of the congregation allow the team to develop rules and resources for the process (Poole 1992) and to adapt those rules and resources as more information and understanding is acquired.

Weick's information systems approach requires that the team engage in retrospective sense making, considering the history and makeup of the congregation and the needs of volunteer as well as professional staff. This involves a great deal of conversation.

Within the framework of objective outlined by the leadership, team members will need to be comfortable with a certain amount of ambiguity, working toward the most plausible solution rather than a perfect one.

A Pugh matrix is recommended to help clarify the team's discussion and bring closure to the process.

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