Church Management System

Planning Center Online (PCO)

Introduction

Planning Center Online is a comprehensive church management software designed to streamline administrative tasks, enhance communication, and improve engagement within our church community. As our central hub for member information, ministry scheduling, event management, and more, PCO provides our team with powerful yet user-friendly tools to effectively serve our congregation. By utilizing this integrated system, we can focus more time on ministry and less on administrative tasks while ensuring all areas of our church operate cohesively.

PCO Applications

People

People serves as our central church database, storing contact information, family relationships and engagement history for everyone in our congregation. This powerful tool allows us to track attendance, manage follow-ups, and communicate effectively with our members.

> Lists are vital to seeing your campus-specific information

> Metrics will allow you to build your own dashboard for seeing all the data for your campus in one spot

> Utilize the 'Database Migration' slide in your newsletters and Sunday gatherings to get people into the system

Groups

Groups enables us to organize, manage, and communicate with our small groups, ministry teams, and other church groups. Leaders can take attendance, send messages, share resources, and manage schedules, while members can easily find and join groups that interest them. This app helps foster community and discipleship by simplifying the logistical aspects of group participation.

> Always ensure you select your campus tag in the settings

> When creating locations for the group, name the location with the town/city you are in (this will make it easy for people to find the groups for your campus)

> Go ahead and add in your groups

> Ensure you select a tag (i.e., your campus)

> When selecting that enrollment is open and visible on Church Center, these groups will be seen and can be able to be requested to join on the website

Services

Services streamlines our gathering planning and volunteer scheduling for Sunday Gatherings and other events. This app allows our worship and production teams to collaborate on service plans, schedule team members, share resources like chord charts and slides, and communicate effectively. With Services, we ensure our worship experiences run smoothly while reducing the administrative burden on our ministry leaders.

Naming Conventions in Services:

- Folders: Campus
- Service Types: Your different services that need either a run sheet or a roster

- Teams: The teams that we have for the service type (GC Kids, Creative, Sunday Experience)
- Positions: The positions required to fill the team (e.g., Worship Leader)
- People: The people that fill that team (e.g., Robyn Blackford)
- Templates: The template for your runsheet and what required positions you need to fill (e.g., 2 Baristas required)
- Songs: The GC Approved songlist
- Media: Not going to utilize too much, but is where media can be added in to be added to a runsheet
- People: Where you can see your teams and all the people and their permission level

Steps for Adding Team Leaders to Services:

1. Go to Services
2. Go to People
3. Click "Add Person"
4. Find the person and open their profile
5. Click 'Actions' and then 'Permissions'
6. Click in the 'Add Service Types or Folders' field and select the service type you want to give them editor access to
7. Drop the permission level down, select "Editor" and then save

Permission Levels:

- Scheduled Viewer: The basic access level for volunteers
- Editor: The permission level for team leaders

Steps for Adding Teams to Services:

1. Navigate to Services > Plans and then to your campus folder
2. Add a service type (campus - service name e.g., 'Wagga - Gathering') and select 'Add times'. DON'T SELECT THE TEAMS, just select finish
3. Click on 'Team Actions', then 'Manage teams'

4. Click on 'Add team' and call it 'Campus - Sunday Experience', or 'Creative Team' or 'GC Kids' (please don't use other names for now). Replicate the steps to create the teams you need. Add a team leader
5. Add position - click on 'Add position' which are the roster positions that need to be filled. You can make as many or as few as you like
6. Create a template - When in Gathering (service type), click on the Templates tab. Click 'Add Template' and type in a template name
7. Then click on 'Team Actions' and then 'Needed positions' and select how many people need to be rostered to each position (e.g., barista may need two people per Sunday, so select two)
8. While here, you can also make a template 'Order' for your run sheet (Not in video)
9. Go back to 'Gathering', go to 'Add plan' and add in the quantity of services you want to create. Make sure the template selected is the template you want to use, and then hit "Add [#]"
10. Now you can roster using the matrix
11. Each term you will need to do this again to create your next services

Rostering Checklist:

- Double check your Service Types, Teams, Positions, and People in Services are up to date
- Double check your templates
- Double check that you have enough dates in your plan for the term
- Hit the matrix to see all your services lined up and then build your rosters

Check-Ins

Check-Ins provides a secure and efficient system for GC Kids and other areas requiring attendance tracking. Parents can quickly check their children into age-appropriate rooms, while volunteers receive name tags, security labels, and attendance records. This system enhances both security and efficiency, allowing us to create a safe environment for our youngest members.

Check-In Usage:

- Check-Ins will be used for GC Kids, GC Youth, Gathering Attendance, and Prayer Meetings
- The easiest way to add check-ins in bulk is via a list at: https://people.planningcenteronline.com/lists
- Check in for GC Kids and GC Youth is via the Check in app.
- To see an overview of your check-ins, go to People > Dashboards and then to the Metrics tab

Registrations

Registrations simplifies the process of creating and managing sign-ups for events, classes, and programs. With customizable forms, payment processing capabilities, and automated communications, this app helps us organize everything from youth camps to membership classes with minimal administrative effort. Participants enjoy a streamlined registration experience, while our team benefits from organized attendee data.

Calendar

Calendar helps us coordinate facility usage, avoid scheduling conflicts, and communicate our church events clearly. By maintaining a centralized calendar, we ensure efficient use of our spaces and provide our congregation with accurate information about upcoming activities. This app integrates with other PCO applications to create a cohesive scheduling system across all ministry areas.

Mobile Applications

Church Center App

The Church Center app serves as our congregation's mobile gateway to engage with our church. Through this user-friendly application, members can:

- View and register for upcoming events
- Join groups and access group information
- Check children into appropriate classes
- Update personal and family information
- View their rosters and block out dates they cannot volunteer on.

Church Center puts the most frequently used features of Planning Center at your fingertips, making it easier to stay connected with our church community throughout the week.

Planning Center Apps for Ministry Leaders

Ministry leaders can download specific Planning Center apps corresponding to their area of service:

- Services App: Allows worship team members to view and edit schedules, access music resources, and block out dates
- Music Stand: Allows the worship team to view the chord charts live on an iPad or phone that can sync with the key and other devices.
- Check-Ins App: Enables GC Kids volunteers to manage the check-in process from a mobile device
- People App: Provides ministry leaders secure access to contact information and communication tools

These specialized applications empower our ministry leaders with mobile access to the tools they need to serve effectively, whether they're at church or on the go.

Video Tutorials:

People Overview

Services Overview

Check In Overview

Groups Overview

How to Add Teams to Services

How to Add Team leaders to Services

CHEX

Introduction

To manage our Safer Churches requirements, we have developed a system named CHEX. It can be access from https://chex.generocitychurch.com.au

LOG IN

Log in to chex.generocitychurch.com.au and have a look at what people will be seeing and doing. This will help you help them, and its possible that your info may need updating too.

PROCESS

TO GET NEW VOLUNTEERS READY for serving, the process is:

1. Add them to the team and position that they will be serving in, you do that in 'services'.
2. This will trigger for them to receive an email about updating their information with GC.
3. Once they log in to chex and update the required information, the safer places team will verify the documents etc (allow up to a week) and it will update their 'background check' in PCO. This looks like a little green shield on the profile page.
4. Now they are ready to volunteer.

Checking Volunteers Status

If you want to find out the status of a volunteers background check and what they are required to do, the following procedure can be followed.

1. Check your campus list in people on Planning Center. Each campus has a list of people who are in teams in Services but don’t have a valid background check. This can be found here. If they are in this list, then we are missing a type of documentation, either a valid Volunteer Declaration, a valid Working with Childrens Check or a valid Safer Places Certificate. Also, if they are in this list, they have already been emailed previously asking them to log in and see what is required to be updated.

2. Contact the volunteer and ask them to log in to chex to see what they are missing. This keeps the language and actions consistent for the volunteers.
3. If they log in and have everything up to date and valid, but they don’t have a green tick on the Background Check on Planning Center, please reach out to saferchurches@generocitychurch.com
4. If they log in and require something to be updated, they will need to do that before they are able to be rostered, instruct the volunteer to do this.

This is more in depth in the Safer Places Chapter of the Handbook

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