

Group Leader Training on ChurchDB

Why do I need to know this information?

- You will be able to see who may be interested but not active in your Committee, Team or Program (Group).
- You will be able to describe what your Group does in a manner easily accessible to potentially interested new (and existing) Members and Friends.
- Use of the system will facilitate communication to and/or within the group via the use of a dynamic email alias that ties to current email information in the database. This can eliminate the need for you to maintain your own email lists, which can quickly go out-of-date.

Accessing ChurchDB

- Hyperlink on top of church web site home page
- Direct address: <https://www.churchdb.com/churchdb/Login.asp?iOrgzKey=74>
- Enter User ID and Password (provided)
- Click Login button
- For selected individuals, you may have to select Member or Staff role

Modules to cover (left bar):

- Directory
- Family Info
- Groups
- Stewardship

Directory

- Click on Directory module
- Enter first few letters of last name (leaving blank generates a full directory, viewable 25 families at a time)
- Click on “Search for Members”
- You can also create a Directory as a PDF report (suitable for printing) or as a CSV report (suitable for manipulation). When ChurchDB creates a CSV report, you also need to click the hyperlink that says “Download the CSV File” – very handy for creating lists of phone numbers or emails.
- If you see [*Address is Private*] in the on-line report or “Not Published” in the CSV, it means this family has not given permission to publish this information. You are able to change your own settings as described in the Family Info > Privacy section below

Family Info

- You can **View/Edit** your own personal data on ChurchDB
 - Key information at Family level: Address, home phone (not cell), email (if applicable to entire family)
 - Key information at Family Member level: Cell phone, personal email, and lots more
- **Change Password** (and/or User ID)

- **Privacy** (on top menu): This controls what gets published in the directory.
 - If a record doesn't exist, nothing will be published – defaults to publishing nothing (except Head of Household (HoH) names in the directory. To create a record, you need to check the box “Check this box to override directory listing defaults by creating a privacy record for this family.”
 - Entries in the Family row propagate down to all members of the family
 - Entries in the Family Members row(s) override anything set at the Family level
- **Ministry Sign-up**: This is where Members and Friends can indicate an interest in any of the Committees, Ministry Programs or Staff needs of the church (categories explained later)
 - When someone signs up, the system adds them to the Group list as “Interested”.
 - There is a link to “learn more” (discussed later)
 - System generates an email to the Group leader

Groups

- **Structure (hierarchy)**: ChurchDB organizes all groups according to function:
 - **Ministry**: These are the programs of the church, and the Ministry groups are further grouped by “area”. The “areas” defined for our church map to the Program Board positions, plus separate groupings for Neighborhood Network and Covenant Groups. As a matter of procedure, the Program Board member is included as a leader of the group.
 - **Organization**: These are the entities in the church that are either elected, appointed or defined by some other position. These groups are not visible to individual members for sign-up.
 - **Committee**: Formally defined councils, committees and task forces under the auspices of the Board of Trustees or Program Board. This does not include groups that are often referred to as “committees” (see Staff below). Committees meet, deliberate, discuss, decide and/or recommend.
 - **Staff**: Groups of volunteer Members and Friends who support the church's administrative, facilities, program, RE and technical functions
 - **Other**: These are reserved for Children & Youth Religious Education use
- **myGroups** (on top menu) lists all the groups you are assigned as leader and as member
 - Click on the group name to see the **Details** of the group, which you may edit if you are a leader): Description, Leader, web site, email. Don't change the settings at the bottom of the view (after Criminal Background Check Required).
 - Click on **Members** to see who is associated with the group. They will have one of the following statuses: Interested (default), Active, Inactive, Archive and there is a Delete button to remove from group. As leader, you may update status, add members to the group.
 - **Members Reports** will give you a listing of all group members along with contact information.

- **eGroups** (on top menu) are derived from myGroups. eGroups give you the ability to send emails to all eGroup members using a dynamic alias generated by ChurchDB.

Some notes:

- Changes in myGroups propagate to eGroups but not vice versa
- eGroups have different statuses than myGroups, which map as follows (as the default):

myGroup status	eGroup status	Comment
Interested	Inactive	Can change to Active in eGroup for emailing
Active	Active	
Inactive	Inactive	
Archive	Inactive	
	Opt Out	People can opt out of the email list
	Bad Email	If system has received a bounce back
	No Email	If no email on record for this person
Delete	Delete	

- **Rules of thumb:** If the eGroup is for a Committee or Staff (Team), then “Interested” group members should not be included in the eGroup; if the eGroup is for a Ministry (Program), then “Interested” group member should be included in the eGroup.
- **Details** (top menu bar) shows the controls available for the eGroup: You can edit the email alias (but not recommended); modify the “Reply to” setting (if mainly for one-way announcements, this should be set to Sender; if mainly used for e-discussion, this should be set to eGroup); Allow Postings By can be set to eGroup Members or Leaders – you decide which is appropriate; if you want to let eGroup members Opt Out, you can set the Include Unsubscribe Link to Yes.
- **Members:** In eGroups, you are able to add either people who are already in ChurchDB or people who have no association with the church. To add someone who does not exist in ChurchDB, fill in the information (last name, first name, email address) in the section called “Add Outside Members”, then click the Add button. We do not recommend adding people to the eGroup who are already in the database (they should be entered into the regular Group instead).
- **Messages** (top menu bar): You can see all messages that have been sent to this group and create a New Message, however, you cannot add attachments to the message. However, you can compose an email outside of ChurchDB and send a message with an attachment to the ChurchDB email alias.

Stewardship

- **Talent:** Here you can check off any of your labor/skills that the church might make use of. They are prefixed by category: Admin(istrative), Lands(cape), Maint(enance), Pr(o)gr(a)m, Rel(igious)Ed(ucation), Techs(upport) and W(o)rsh(i)p.
- **Treasure:** Here you can find your pledges and contributions. You can also make a new pledge here, but I haven't investigated system behavior here yet, so leave that one alone now until you hear differently.