How One Church Saves Hours of Time and Hundreds of Dollars Each Year

After using the same church software system for 20 years, Camarillo United Methodist Church (CUMC) saw a number of signs that it was time to consider new software. It was difficult to use, it slowed down their processes, data was hard to access, support left them without the help they needed, and the yearly cost was too much. After switching to Servant Keeper, they saved money, reduced administrative expenses, cut staff workload and hours, and had more time to do ministry!

- **Immediate savings.** CUMC now saves $600 each year on church software support costs alone.

- **They cut their administrative workload.** CUMC needed to reduce the full-time position of Office Director and Treasurer to part-time due to financial reasons. The time savings, and ease of Servant Keeper, helped to make that possible. Notably, the former full-time worker has now happily shifted her focus to volunteering with CUMC's medical outreach ministry.

- **Freed up staff time.** Staff is completing tasks faster. Plus, data is now more accessible to more staff, reducing bottlenecks.

- **Improved data integrity.** Data is entered in one database. The ease of using the system, the ability to set up custom fields, and improving internal processes are all improving data accuracy.

Camarillo United Methodist Church serves in a community of over 66,000 people in California, midway between Los Angeles and Santa Barbara. At the time of looking for a new system, Pam Dougherty had been the paid Office Director and Treasurer for 6 years, putting her in charge of both office administration and treasurer duties.

From Hindered to Streamlined: Finding a new solution and improving processes after 20 years

Pam was looking for a way to: streamline the church's processes, save staff time, improve data integrity, cut administrative expenses, and help the ministry team spend less time on spreadsheets and more time serving people. But, the software the church had for at least 20 years stood in the way.

The system crashed and lost years of historical membership data; the recovery process that followed this loss highlighted the need for a database that was easier to understand and use. Some of the information was not able to be recovered during the data restoration. Instead, this missing historical data had to be entered by church staff manually. This process was no easy task, as the database they were using was not intuitive.

The software was also ineffective and time consuming. "Accessing information was limited to someone who had keen knowledge of how databases worked," Pam continued, "the membership database was cumbersome and not intuitive."

Reporting had also become a significant challenge for the ministry. "Fields were inflexible and had not been maintained and updated to meet the requirements of the UMC annual reporting." This not only affected their national and conference level reporting, but also their ability to communicate with and report to their church members. "Contribution statements were cumbersome and not intuitive," Pam said.

Challenges with the system were made worse by the fact that the software support was becoming less cost effective. At the time, support cost CUMC $900 a year. In one instance, support suggested ways of "tricking the database" to make the information "look right", instead of offering a solution to fix the database. This kind of response, and the fact that the system had been recently bought out by a larger company were both red flags to Pam that soon the software may not be supported at all. She knew it was time to find new church management software.

Transforming Ministry and Saving Resources with Servant Keeper

Pam began researching church management software solutions. She checked with other UMC churches first. But at the time, each church she checked with did not have a system in place they liked. Pam began her own research, and kept hearing about Servant Keeper. "I found information about Servant Keeper online – it just kept coming up!"

She quickly discovered that Servant Keeper was not only cost effective, but scalable to meet the needs of CUMC. "I found that many companies only offered online services that had ... higher costs as well," said Pam. "We bought Servant Keeper outright for just a little more than what we were paying for our annual support with [their previous software]. The renewal for support will be much less, which was a necessity for this year's budget." Plus, the option to add the cloud at any time made the decision future-proof.

But it wasn't just the cost savings that initially drew Pam to Servant Keeper. There was also the fact that it integrated well with Quickbooks. This meant the financial secretary and treasurer would no longer have to enter the same data twice. Instead, Servant Keeper would automatically upload their contributions into Quickbooks. Now the financial secretary and treasurer (who are required to be two different people) can work in their own systems (which is a best practice of accounting), and yet still pull reports and track each other's work. "Both databases are much easier on data entry, error correction or making changes. We used to waste a lot of time trying to figure out what was wrong in the old… databases and how to reconcile errors and discrepancies."

As far as ease of use, Pam shared, "I taught myself how to use Servant Keeper database. I am no rocket scientist. It's very intuitive. It makes sense." Not only could Pam teach herself, but she also was able to quickly transfer her responsibilities to the finance secretary. "She has found the program to be easy to learn and use."

Since switching to Servant Keeper, the church's data tracking and reporting has been made simpler, and more accurate. They can now log total attendance by each class, group, and also for their worship services. Plus, they appreciate the ability to easily set up custom fields that provide specific information they need to report annually to their UMC conference. And, the reports they previously created by hand are a thing of the past. "The manual reports are no longer necessary. And we have discovered some very important reports in Servant Keeper that provide good information on the health of giving by members and friends of the church."

Continued Improvements

Today, the church is able to complete the same tasks in less time. And Pam has since been able to put more time into running CUMC's own Medical Supply Project, providing life-changing donated medical supplies like crutches or wheelchairs to others in need. "One of our most important objectives for 2018 was to save money on administrative expenses. We had to reduce staff hours in the church office and cut expenses as much as possible. Servant Keeper allowed us to do that while continuing to provide financial membership functions necessary for accurate reporting and operations."
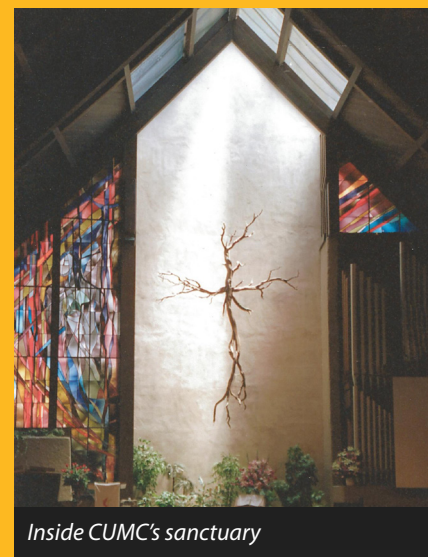
Inside CUMC's sanctuary

Finding New Software

Some factors Camarillo UMC considered when choosing Servant Keeper:

1. **Information gathered from their own research.**

2. **Input from other churches.**

3. **Savings on total cost of ownership.**

4. **Integration with top accounting software.**

5. **Ease of use.**

6. **Ability to scale to their church's needs.**

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Pam Dougherty
Camarillo UMC, California

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