



VOLUNTEER MANAGEMENT PROPOSAL

Client: Evanston Bible Fellowship

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Executive Summary

Evanston Bible Fellowship (EBF) is a local church in Evanston that depends on several volunteers to provide church services each Sunday morning. In order to operate, the church depends on the following teams to provide their individual volunteer services: AV Team, Children's Church, Security Team, Mover Team, Usher Team, Welcome Team, EBF 101, Counters, and Worship Team. In its current state, there is no uniformity between the teams and how the volunteers are scheduled. There also have been significant problems with absenteeism and late shows amongst the volunteers. Our team's task was to provide analysis and recommendations on how to best solve these issues.

Our team focused on three primary deliverables to provide our client, Kyle Butson, with a solution for some of the current scheduling issues. First, we first sought to provide analysis on the feasibility of limiting the volunteers to only serve on one team in addition to providing an optimal rotational schedule that specifies the number of teams and members on each team within each volunteer role. Secondly, we sought to provide a communication plan that would instruct the team leaders on how to schedule and communicate with their volunteers by utilizing the program, Planning Center. Thirdly, as the church is investigating purchasing a new feature of Planning Center that would require volunteers to "check-in" upon arrival on a Sunday morning, we sought to provide analysis on the number of additional volunteers that this role would require.

We recommend that as a church, EBF should not require volunteers to only serve on one team. This would limit the volunteers' preferences and could lead to a decrease in volunteer satisfaction. We also propose that the team leaders utilize Planning Center by notifying their volunteers month by month when they are scheduled, based off of our optimal rotations. EBF already uses the software, therefore there are no implementation costs, and utilizing its functionality would provide a more streamlined form of communication between leaders and volunteers. We also recommend that the church schedule three volunteers at different time intervals on a given Sunday morning to account for the new Check-In role. This role would increase volunteer accountability and could provide a uniform platform for absenteeism, rather than the variability that results from depending on individual team leaders.

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Problem

Our primary objective for this project was to find optimal allocations for volunteer scheduling in order to decrease absenteeism/tardiness while not sacrificing the satisfaction of leaders and volunteers. We decided to separate this project into optimal scheduling, a communication proposal, and a recommendation to update the check-in process.

In order to better understand EBF’s weekly volunteer process, we mapped out the way a typical day of service would be organized in terms of scheduling leaders and volunteers, as shown below in Figure 1. In mapping out a typical day of service, we had to keep in mind certain issues such as avoiding the possibility of overextending volunteers’ scheduling and decrease overlap among teams. After speaking with our client, we agreed that there was an issue with some roles not being clearly defined as well as there being roles that could possibly be merged in order to increase overall accountability. There was also many situations where we found volunteers being scheduled overly frequently due to being a part of multiple teams. What we found was that there was space to improve the overlap situation that existed as well as roles that could be done by people on different teams.

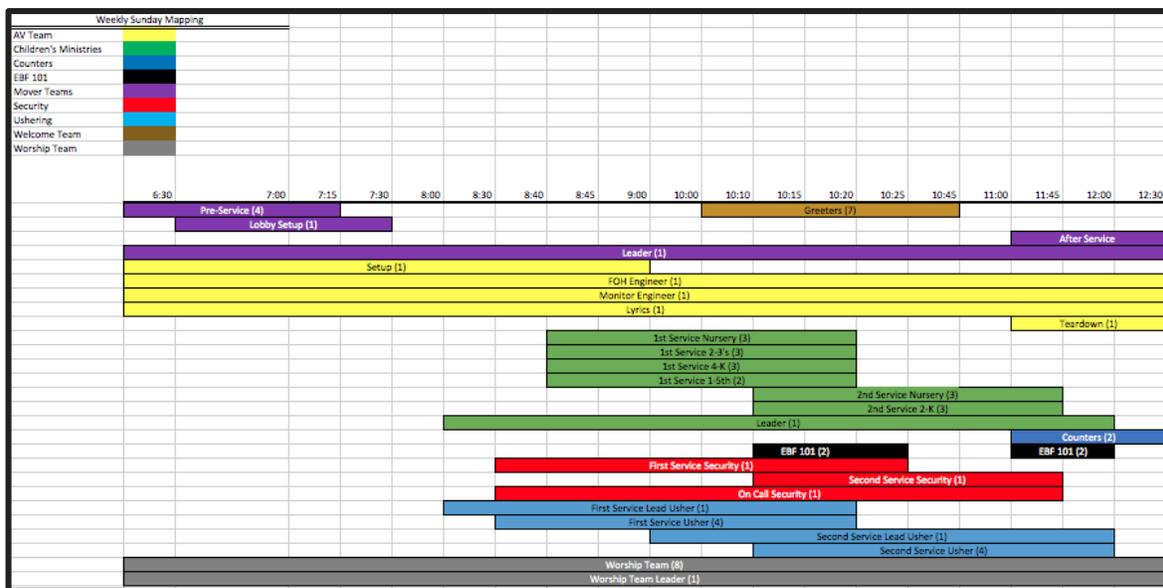


Figure 1: Map of Current Team Hours on Sunday

Another challenge we encountered with our volunteer organizations stemmed from miscommunication between leaders and volunteers. We found this from our survey results from the leaders and volunteers.

Volunteers	Results					Average Satisfaction Level	Completely Positive (4&5)
	1	2	3	4	5		
How easy is it to sign up?	0	1	11	37	29	4.21	66
	0%	1%	14%	47%	37%		85%
How easy is it to know and remember when you're scheduled?	0	2	10	35	31	4.22	66
	0%	3%	13%	45%	40%		85%
How satisfied are you with how your leader communicates with you?	0	2	6	32	38	4.36	70
	0%	3%	8%	41%	49%		90%
How aware are you of the expectations?	1	3	6	30	38	4.29	68
	1%	4%	8%	38%	49%		87%
How often have you missed your scheduled time?	0	0	1	19	58	4.73	77
	0%	0%	1%	24%	74%		99%
Does your leader contact you if you missed?	5	2	15	8	36	4.03	44
	8%	3%	23%	12%	55%		67%
						4.31	

** 1 usually ranked as "Very Difficult" or "Not at All" i.e. Negative responses

** 5 was the most positive ranking in this system

Figure 2: Volunteer Survey Results

As shown in Figure 2, the volunteers seemed to be generally satisfied with the way the volunteering scheduling was being done, with the biggest pain point (measured by a weighted satisfaction level) coming from a lack of accountability on behalf of the leaders. An interesting point we found had to do with the self-reporting of attendance on behalf of the volunteers. From our survey's results, most volunteers believed they rarely or never missed their scheduled time.

Leaders	Results					Average Satisfaction Level	Completely Positive (4&5)
	1	2	3	4	5		
How often do you have to deal with volunteers?	0	6	2	3	1	2.92	4
	0%	50%	17%	25%	8%		33%
how often do volunteers cancel within 24 hours?	1	9	0	2	0	2.25	2
	8%	75%	0%	17%	0%		17%
How often do you use the planning center?	6	2	0	1	3	2.42	4
	50%	17%	0%	8%	25%		33%
How easy is it to use the software?	1	1	4	3	1	2.67	4
	8%	8%	33%	25%	8%		40%
how satisfied are you with volunteers responsiveness?	0	5	4	3	0	2.83	3
	0%	42%	33%	25%	0%		25%
Generally, how satisfied are you with the current volunteer scheduling procedure?	0	1	10	1	0	3.00	1
	0%	8%	83%	8%	0%		8%
						2.68	

** 1 usually ranked as "Very Difficult" or "Not at All" i.e. Negative responses

** 5 was the most positive ranking in this system

Figure 3: Leader Survey Results

The leaders showed an overall lower level of satisfaction with the way the process was being handled. As shown in Figure 3, leaders' average satisfaction was low across the situations presented by the survey, especially when referring to the accountability of their volunteers. The clear disconnect stemmed from communication issues, prevalence of absenteeism, and last minute adjustments that usually fell on the shoulders of the leaders.

Rotation Schedule Options

In order to tackle the lack of uniformity across teams in terms of scheduling, we sought to develop a standard rotational schedule for EBF. In our analysis, our team discovered that it would be beneficial to cross train the Usher and Welcome teams as this would provide a larger volunteer pool to draw from. This also would create greater unity and uniformity. As these two groups stand, they have similar roles and contain volunteers who enjoy serving in similar ways. As we talked to the leader of the Usher team, we discovered that it was often difficult to obtain enough volunteers for that particular team. By cross-training and combining the Usher team with the Welcome team, this issue can be eliminated. However, after discussions with Kyle, we realized that it was infeasible to combine other volunteer teams as there are unique skill sets and interests required of each team.

One of Kyle's original primary goals was to determine what the best rotation schedule should be given the current number of volunteers signed up for each team. Currently, each volunteer team has its own way of scheduling and rotating through volunteers. Kyle wanted to know if it would be more efficient to have each team be on the same rotation schedule. Figure 4 displays the current rotation and scheduling process for each team. One of the issues with the current schedule in addition to the variance among the teams is that for the teams that schedule based on the ordinal Sunday of the month, they have no way to account for the Sunday's in which there are five Sundays. In addition, the teams that ask volunteers to provide their ability multiple months out are more likely to have participants forget or have a last minute scheduling conflict.

Team	Rotation	Scheduling Process
AV Team	Sunday-by-Sunday	Leader asks individuals about a week out
Children's Ministries – Nursery Roles	Ordinal Sunday of the Month (1st, 2nd, etc)	Volunteer signs up when joining the team
Children's Ministries – Other Classes	Varies – Typical Volunteer Serves About One Month per Quarter	Leader schedules them at the beginning of the quarter
Counters	1 Month On (Each Sunday), 3 Months Off	Volunteer signs up when joining the team
EBF 101	Sunday-by-Sunday	Leader asks individuals about a week out
Mover Teams	Ordinal Sunday	Volunteers signs up when joining the team
Security Team	Sunday-by-Sunday	Leader asks individuals about a month out
Lead Ushers	1 Month On (Each Sunday), 2 Months Off	Volunteer signs up when joining the team
Usher	1 Month On (3/4 Sundays in that month), 2 Months Off	Lead usher schedules their Sundays a week before their next month begins
Welcome Team	Sunday-by-Sunday	Volunteer checks off on availability, for as much as a quarter to 6 months out
Worship Team	Sunday-by-Sunday	Volunteer checks off on availability a quarter out; Leader makes specific requests for team about a month out

Figure 4: Current Rotational Schedule for Volunteer Teams

Each of the team leaders provided our team with the following information: number of volunteers, number of volunteers required on a given Sunday, optimal number of Sunday's to

serve (See Appendix A). Using this provided information our team is recommending the following optimal rotation schedule given the current number of volunteers:

	# of volunteers	# of teams	# on each team	# of Sunday's served
AV Team	12	2	6	26
Children's Church	51	3	17	17 or 18
Security Team	15	5	3	10 or 11
Mover Team	27	3	9	17 or 18
Usher/Welcome	60	3	20	17 or 18
EBF 101	6	3	2	17 or 18
Counters	9	4	2 or 3	13
Worship	40	4	10	13

Figure 5: Optimal Rotational Schedule Given Current Volunteers

Because there is a large variety of size of teams and the number of volunteers required on a given Sunday, it is not efficient to have a uniform rotation schedule amongst the teams. In order for there to be an even distribution, a significant amount of re-organizing what volunteers are members of which groups would be required. This is not something that is desirable or feasible as each volunteer team requires a unique skill set and varied interests. Our team is recommending that the team leaders schedule according to the above rotations while informing members month to month, when they are scheduled. While the rotation schedule itself will be unique to the team, there will be a uniformity of communication to the volunteers as well as in the process of scheduling.

As illustrated previously, one of the largest problems at play is the absenteeism that exists in EBF's volunteer teams. Our team noticed from the survey results that there was a discrepancy between the volunteers thinking that they did not miss, while the leaders stated that they continually had to account for a missing team member. In order to create some accountability, EBF has been considering purchasing a new feature of Planning Center that would allow the church to have a "check-in" station that would require the volunteers to punch in information on an iPad at a central location when they first arrived.

Our team recommends that EBF form a new volunteer team, the Check-In team to run this station. Another requirement of the team would be that its members are prepared to help in any capacity on a Sunday morning. This way, as they become aware of who is absent, they can fulfill the missing role. This additional team would require three volunteers each Sunday, and a three team rotation would likely be desirable.

Another question to investigate was the feasibility of requiring each volunteer to be committed to only one team. This would allow the volunteers to master the tasks of their specific team as well as develop more of a relationship and bond with their team. Additionally, this would eliminate the possibility of double booking a volunteer on a given Sunday. Therefore our team investigated if this was feasible for the capacity of the church.

We were provided information that showed us which volunteers were assigned to which teams (See Appendix B). This information was helpful as it allowed us to know where there was

overlap on membership amongst the teams. Therefore in desiring to know if the church had the capacity to require each volunteer to be a part of only one team, our team was able to assign volunteers to a single team while seeking to maintain even disparities amongst the teams. The following represents given the current number of volunteers, how many Sundays a year each team member would have to serve if volunteers were only allowed to serve on one team.

	# of Total Volunteers	# of Teams	# of members on each Team	# of Sunday's served each year
AV Team	10	2	5	26
Children's Church	44	2	17	26
Security Team	6	2	3	26
Mover Team	19	2	9	26
Usher/Welcome	47	2	17	26
EBF 101	6	3	2	17 or 18
Counters	8	4	2	17 or 18
Worship	27	3	9	17 or 18
SUPER	0	3	3	17 or 18

Figure 6: Optimal Rotational Schedule with No Overlap

If we sought to maintain the optimal number of Sundays each team member had to serve, the following shows how many additional volunteers would need to be recruited for each team:

	Volunteers Needed
AV Team	5
Children's Church	6
Security Team	5
Mover Team	5
Usher/Welcome	4
EBF 101	-2
Counters	5
Worship	-9
SUPER	9
TOTAL	28

Figure 7: Additional Volunteers Needed for No Overlap

If the church were to require volunteers to only participate on one specific team, this would likely result in a drop in volunteer satisfaction as they would have far less ability to make choices based off of their preferences in volunteering. Not only would it require those who enjoy serving on multiple teams to then serve only one, but the church would need to dictate to the volunteers which team each volunteer should be a member of as to ensure that there are enough participants in each function. The volunteers would also lose their ability to choose how many Sundays they were interested in serving on as those who were on multiple teams would result in serving less, and those who served on only one team would end up serving more.

As all of this labor is volunteer based, it is important to keep the volunteers happy and engaged. By removing choices from them, the volunteers may become more disgruntled, bored

and unsatisfied. Based off of this information, it is our recommendation that the church maintain its current stance allowing volunteers to participate on multiple teams.

Our team was informed in our discussion with Kyle and one of the team leaders that sometimes it is difficult for some of the teams to recruit volunteers. Each time new members join the church they are asked where they would like to serve and from there select a team. Some of the teams with less “glamorous” roles have a tendency to not be selected. In order to help with even distribution of new volunteers, we sought to provide a visual that displayed each teams’ fulfillment level of how many volunteers are required to reach the optimal capacity. Figure 8 below displays EBF’s current state and need amongst the teams.

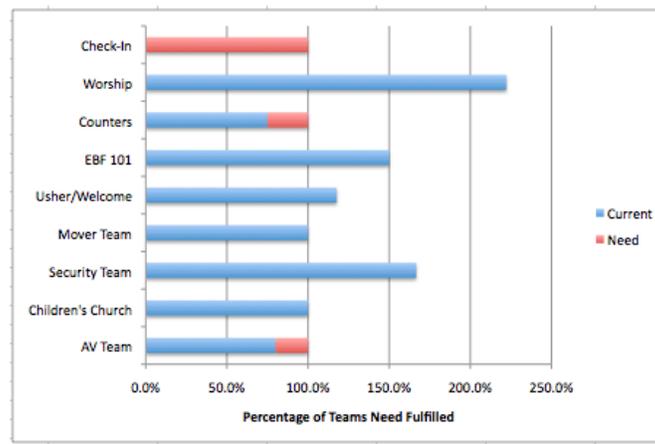


Figure 8: Current Volunteer Needs

As a church located in a college town, EBF has several considerations to account for given that about a third of their congregation is not present during summer months. As a way to compensate for this change, the church only provides one service on a Sunday morning for 22 Sundays of the year. The Sunday’s with only one service require different numbers of volunteers and the volunteer teams themselves lose roughly one third of their members.

This is not an issue for the majority of the teams, as either the team is not made up of many students, or the number of required volunteers on a given morning is significantly less. If the team leaders evenly distribute the students amongst the teams, the loss of the students should not affect scheduling when there is only one service provided.

However for the AV Team and the Mover team, the number of volunteers lost in the summer months is greater than the drop in need on Sundays with one service. To account for this loss the AV Team and Mover teams will have to increase the number of Sunday’s that the volunteers serve in summer months. The number of weeks in the rotation will therefore change. During the 22 weeks of the year with one service provided the teams should operate under the following schedule.

	# of volunteers	# of teams	# on each team	# of Sunday's served
AV Team	7	2	4	26
Movers	17	2	9	26

Figure 9: Optimal Schedule for 1 Service Weeks

As shown above, each team is one volunteer short of being able to provide two full teams. Therefore, every other week each team will require a volunteer from the other team to serve again. The team leader should be able to account for this in their scheduling in Planning Center.

Communication Proposal

From analyzing our survey results, we noticed an interesting disconnect between the satisfaction of the volunteers and leaders. Nearly all the volunteers expressed that they never, or rarely ever, missed a scheduled service, whereas the leaders stated they had to deal with absentees and late arrivals regularly. The difference in responses from the leaders and volunteers sparked our investigation into the current communication procedure. What we discovered is that there is currently no standard for communication amongst leaders and volunteers. Each leader is individually responsible for scheduling and contacting their respective volunteers. We saw the potential to improve the scheduling ease on behalf of leaders and develop a way in which the volunteers remain always aware of their responsibilities.

EBF currently has a paid prescription to the online scheduling platform, Planning Center; however, it is not widely used across the church. Planning Center has a vast array of capabilities that should be utilized by the leaders of EBF. These capabilities can simplify scheduling and reduce the time leaders must spend ensuring their volunteer demands are fulfilled. In order for Planning Center to ease the scheduling procedure, we propose that EBF standardize the expectations of communication within their volunteer sector.

EBF should utilize the People, Services, and Check-In functions offered through Planning Center. These applications will allow the leaders to manage their volunteer team, set a schedule, ask volunteers to sign up for a given service, send reminders to volunteers, check-in volunteers when they arrive for their scheduled assignment, and notifying volunteers when they miss when they are scheduled. By compiling all of these tasks onto one platform, the leaders can easily track scheduling and communicate with their volunteers.

The roles of the leader in terms of the use of Planning Center include *adding new members, creating a schedule, scheduling volunteers, and reminding volunteers of their assignments* (see Appendix C for a full explanation of the steps required to carry out these tasks). The volunteers only must accept and decline invitations from their leaders to volunteer. In terms of scheduling, the leaders should send out the requests for volunteering before the first Sunday of each month to the respective subgroups of each volunteer team as indicated by our rotational schedule. Planning Center allows leaders to set these requests to automatic for each month. It

should be the expectation that volunteers accept/decline their assignments within a timely manner. Once the leader has received the initial responses from volunteers, if there are vacancies in the demand, the leader should send out a request to all volunteers on their team to fill these openings. We propose that the leaders send out the second round of requests to their entire team for two main reasons. First, volunteers who are unavailable to serve on their assigned Sunday have the opportunity to serve another day. Second, volunteers who wish to serve more than their assignments can do so. Planning Center will keep the volunteer schedule organized and make it simple and effective for leaders to set and alter their volunteers' work assignments.

Check-in Team Recommendation

In order to better accommodate for absences, we identified the potential to form a new volunteer team at EBF. This team would be called the Check-in Team and, as can be inferred from the name, would be responsible for checking-in volunteers through Planning Center as they arrive for their scheduled services. After the volunteers have arrived, the Check-in Team would fill vacancies if there happen to be absentees on other teams. Therefore, this team would be composed of "Super Volunteers," who have the ability to fulfill multiple roles within the church.

We identified a few requirements in order for the Check-in Team to be a feasible and advantageous implementation for EBF to carry out. First, the check-in system has to have the capacity to check-in the volunteers without developing a large queue. Next, the check-in system will have to operate swiftly so as to not increase the required work time for the volunteers.

In order to get a better understanding of the current arrival rates of volunteers and determine whether or not a Check-in Team is feasible, we observed the distribution of arrivals of volunteers on Sunday and developed a simulation model to represent a typical Sunday (see Appendix D for Simio Model).

Check-In Time (Minutes)	Number of Check-In Stations	Average Waiting Time (Minutes)	Maximum Waiting Time (Minutes)
1	1	0.59	4.002
2	1	2.87	7.998
3	1	10.15	16.098
1	2	0.22	1.998
2	2	0.46	4.002
3	2	1.04	6

Table 1: Check-In Time Simulation Results

As can be seen from the table above, as the time to check-in increases, so does the average and maximum waiting times. According to the data above and the volunteer arrival flow, we recommend one check-in station from 6:30am-8:30am and two check-in stations thirty minutes before each service (8:30-9:00am and 10:00-10:30am). Since the flow of arrival is much slower in the early morning, only one station is needed. Before each service, though, arrival rate

increases and volunteers arrive in different entrances. This requires two stations for ease of traffic and minimal waiting time for check-in. Two volunteers will be needed to man the two check-in stations.

We recommend these shifts for the check-in team volunteers:

Volunteer 1	6:30am-9:00am (assist in set-up)
Volunteer 2	8:30am-10:30am
Volunteer 3	10:00am-12:00pm (stay after service for tear down)

Each volunteer may be needed to serve during a 9:00am or 10:30am service. Otherwise, they will have the time to attend a service as a church member.

As mentioned previously, check-in volunteers will be cross-functional and versatile volunteers. The check-in volunteer who arrives early in the morning will be able to serve in any role where there is an absent volunteer or is able to be a part of the mover team as less than fifteen volunteers arrive in the following two hours and it is inefficient for the check-in volunteer to be idle for the majority of the time.

Conclusion

Our original goal for the project was to improve the volunteer experience for volunteers at Evanston Bible Fellowship. With the implementation of a standard rotational schedule, a set expectation for communication, and the addition of a Check-In team we believe this goal can be accomplished. Though EBF does not currently have the capability to limit the volunteers to one team, they are still able to implement a uniform rotational schedule across teams. With the use of Planning Center, the communication issues between leaders and volunteers can be essentially eliminated. The time put in by the individual leaders will also greatly decrease, as Planning Center has a vast number of automatic functions. To account for absenteeism, the Check-In Team will serve to fill vacancies that may be present. We believe EBF will run more optimally and have higher satisfaction among volunteers moving forward.

Appendices

Appendix A: Current Volunteers

Team	Current TOTAL Number	Overlap with Other Teams	Number of Students	Optimal TOTAL Number (as judged by leader)	Optimal # of Sundays Serving/Year (as judged by leader)	Optimal Number Need Per Sunday (2 Services)	Optimal Number Needed Per Sunday (1 Service)
AV Team	12	9	5	20	18	5	4
Children's Church	51	15	11	75	36	11	6
Nursery					13	6	4
Security Team	15	14	0	10	18	3	2
Mover Team	27	19	10	30	18	9	9
Ushering Team	32	25	2	40	12	8	4
Lead Ushers	6	3	1	7	17	2	1
Welcome Team	22	8	3	23	16	7	7
Worship Team	40	17	17	50	16	9	9
EBF 101	6	6	0	6	26	2	2
Counters Team	9	5	0	9	14	2	2

Appendix B: Volunteer Commitment

	Worship Team	Security	Counters	Welcome Team	AV	Ushering	Mover Teams	Children's Church	TOTAL
Person 1				1		1			2
Person 2				1		1			2
Person 3				1		1			2
Person 4				1		1			2
Person 5				1		1			2
Person 6		1		1					2
Person 7				1			1		2
Person 8				1				1	2
Person 9				1					1
Person 10				1					1
Person 11				1					1
Person 12				1					1
Person 13				1					1
Person 14				1					1
Person 15				1					1
Person 16				1					1
Person 17				1					1
Person 18				1					1
Person 19				1					1
Person 20				1					1
Person 21				1					1
Person 22				1					1
Person 23		1				1		1	3
Person 24		1				1			2
Person 25		1				1			2
Person 26		1				1			2
Person 27		1			1		1		3
Person 28		1					1		2
Person 29		1					1		2
Person 30		1					1		2
Person 31		1						1	2

Appendix C: Planning Center Proposal

Proposal for the Use of Planning Center

A Guide to the Capabilities

Client: Evanston Bible Fellowship

Written by: Roderic Figueroa, Lydia VanZalen, Lauren Patras, Monica McGreal

There are a variety of capabilities that can be utilized within Planning Center, the online scheduling platform. There exist three main functions within Planning Center that should be employed: Services, People, and Check-in. We propose that Evanston Bible Fellowship utilize these capabilities to their full capacity. With the proper correspondence via Planning Center by the team leaders and volunteers, the ease of scheduling and its maintenance can be greatly increased.

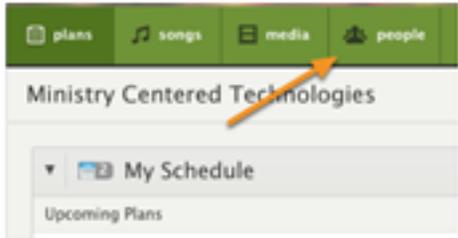
Leaders' Roles

Adding New Members:

First, the leaders must create their teams on the sight. This requires the leaders to input the names and email addresses of each volunteer on their team. Once this information is provided, Planning Center immediately sends an email to the team members with a login to their Planning Center profile.

Figure 1: Adding New Members

Click on the People tab

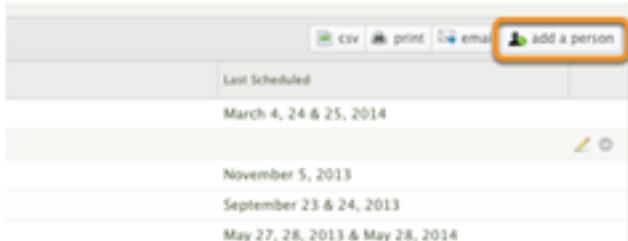


Ministry Centered Technologies

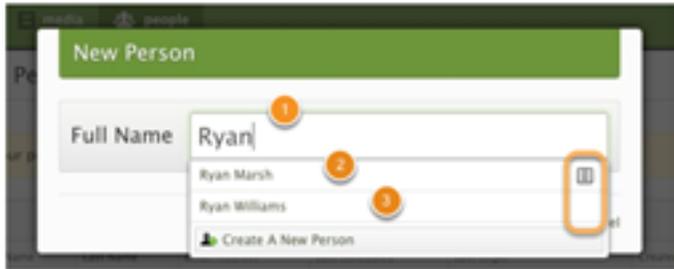
My Schedule

Upcoming Plans

Click on add a person



Enter the person's First Name, Last Name, and Email Address



1. Enter the name of the person you wish to add. (NOTE: You will see a search box showing you any person's name that could already exist in your account.)
2. If the person already exists in your PCO Services account, their name will appear in the drop down menu, like Ryan Marsh is. If you select their name, you'll see an error because it cannot add a duplicate person.
3. If there is not an icon by their name, but they show up in the list of people, they exist in your

Creating a schedule:

The leader can input the hours and days that correspond to their specific team. These can be inputted into Planning Center as “Service Types” and can be repeated for a given time period (daily, weekly, monthly, etc.). These events are visible to only the leader until they are shared with the volunteers. Once the leader creates an event, they can specify needs for the event. For instance, the leader can state that 3 volunteers are needed for the event “Sunday, May 17, 2015, from 7:15-9AM.”

When developing the schedule, the leaders need only to input the given time slots and volunteer demand needs for a single Sunday and repeat this event for all the Sundays that the same needs apply.

Figure 2: Creating Service Events

Your Plans Page: Create a Service Type

New Service Type

Name

A Service Type is a set of plans that are grouped together. Some example names could be: Traditional Service, Contemporary Service or Children's Ministry. (2017, 2017).

Default Teams

We'd love to help you get started by creating some sample teams for you! Check the teams below you'd like to be added. Don't worry if they aren't exactly what you need because you can easily change them at any time.

<input checked="" type="checkbox"/> Audio/Visual <small>Lights, Audio, Camera, Producer, Video Switcher, Sound, Lights</small>	<input checked="" type="checkbox"/> Vocals <input type="checkbox"/> Sopranos, Alto, Tenor, Bass, Choir, Soloist, Worship Leader <input checked="" type="checkbox"/> Worship Team, Worship Leader <input type="checkbox"/> First Impressions <small>Covered, Color, Set Up, Tear Down, Parking</small>
<input checked="" type="checkbox"/> Band <small>Drums, Bass Guitar, Acoustic Guitar, Electric Guitar, Keys, Percussion, Piano, Organ, Worship Leader</small>	<input type="checkbox"/> Children's Ministry <small>Moms, Toddlers, 2's and 3's, 4's and 5's, 6-8, 9-11</small>
<input type="checkbox"/> Orchestra <small>Viola, Violin, Cello, Flute, Clarinet, Trumpet, Trombone, Sax, Director</small>	

A **Service Type** is a set of plans that are grouped together. Service Types are most commonly used for the different services you advertise or for different ministries in your church. For example, if your church has a **Sunday Contemporary Worship Service** that occurs every week at 9:00AM & 10:30AM, and also a **Sunday Traditional Worship Service** in another room also at 9AM. In Planning Center, you would create 2 Service Types. The first will be **Sunday Contemporary Worship** which (since 9AM and 11AM are basically the same thing, you would group them into one Service Type), and the second will be **Sunday Traditional Worship**.

Name your Service Type a general name, like "Sunday Morning Worship" or "Jr. High Ministry", not a specific date, like "September 4th". The plans inside your Service Type, however, will have specific dates. You can also [log in to our sample account](#) to see many popular ways to set up your Service Types.

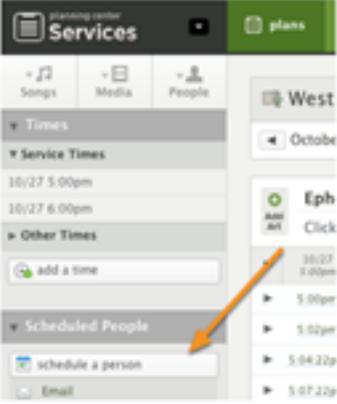
Scheduling Volunteers:

Once the events are created, leaders can share them with volunteers, who can then accept or decline the invitation to volunteer. Scheduling for each month should be completed the week prior to the first Sunday of the month. With the rotational schedule, the leaders will know the makeup of the subgroups within their team. Therefore, they will send each of the volunteering invites to only the individuals in the group that corresponds to the schedule for that day. For instance, if the rotational schedule says Group A is to volunteer Sunday, May 17th, 2015, then the

leader will send this event to only the members of Group A before the first Sunday of May. Once all of the volunteer needs for the month are sent to the respective subgroups, the leader waits for the volunteers to accept/decline the invitation to volunteer. It is advised that it is the expectation for volunteers to respond in a timely manner (5 days within the invite being sent). This expectation is set because, in the case that a volunteer in Group A is not available May 17, 2015, the leader has time to find another volunteer to fill that spot. In the event that a volunteer is not available to work the Sunday their group is assigned to, the leader sends out the invitation to all other volunteers on their team asking for someone to sub in the vacant spot. By sending the second round of volunteer needs to the entire group, two events are enabled. First, volunteers who may not be able to fulfill their assigned Sunday in a given month have the opportunity to serve on another Sunday. Second, volunteers who are looking to volunteer more than their assignments can sign up for additional days.

Figure 3: Scheduling Volunteers

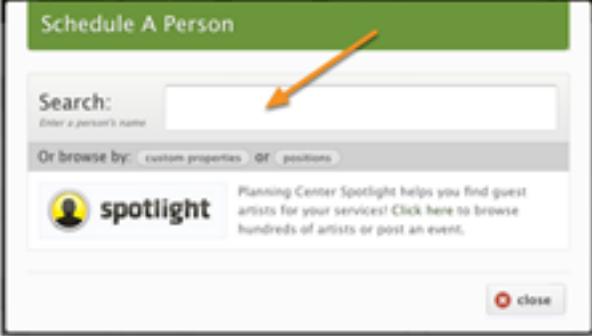
To schedule a person individually, click Schedule A Person



The screenshot shows the 'Services' interface with a sidebar on the left and a main content area on the right. The sidebar has sections for 'Songs', 'Media', and 'People'. Under 'People', there is a 'Scheduled People' section with a 'schedule a person' button. An orange arrow points to this button. The main content area shows a calendar view for 'West' in 'October' with a list of service times and a 'Schedule A Person' button. Another orange arrow points to this button.

From within any plan, click "Schedule a Person" in the People section or type the letter P.

Enter a name or click to browse



The 'Schedule A Person' dialog box has a green header. Below it is a search box with the label 'Search:' and a placeholder 'Enter a person's name'. Below the search box are two buttons: 'Or browse by: custom properties' and 'Or browse by: positions'. At the bottom left is a 'spotlight' logo and text: 'Planning Center Spotlight helps you find guest artists for your services! Click here to browse hundreds of artists or post an event.' At the bottom right is a 'close' button. An orange arrow points to the search box.

If you know who you want to schedule, type their name in the search box.

Type the name of the person you want to schedule

As you type you will immediately get results. Select the correct person from the list. (You can also type the name of a position or tag in the search bar to see all people assigned to that position or tag)

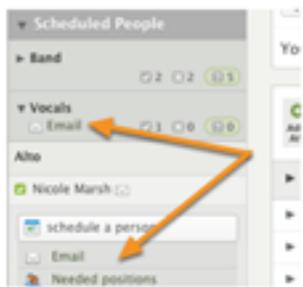
Edit details, click Accept

- Status:** Unless you have changed the [default settings](#) for this team, the status will default to unconfirmed (most likely what you will want them to be). If you change their status to confirmed or declined, when you send them an email it will not have the buttons to "Accept" or "Decline".
- Team and Position:** this is where you will set or edit the team and [position](#) a person is scheduled for. Click in the position box, and a list of positions under that category will come up. You can always type your own if you'd like, but it won't actually create a new position under your team.
- Times:** Check the times you want to schedule this person for. Times that are unchecked won't appear in their schedule. You can automatically assign these times based on the category you schedule them for by reading [this lesson](#).
- Replies To person:** The person who will be notified if this person accepts or declines. You can change the default Replies to person for an entire category by reading [this lesson](#).
- Prepared Notification:** Make sure this box is checked if you want this person to receive an email inviting them to this plan (the email will not be sent until you click 'email these people'). [Here](#) is a lesson that will show you how to send those

Once the leaders have added volunteers to the schedule, they must send an email notification to the volunteers in order to share the schedule with them. This process is outlined below.

Figure 4: Sending Schedule Notifications

Click 'Email' or 'Email these people'



Once your people are scheduled, you still need to send them the scheduling email for this plan so that they can view it and respond for their position. An envelope next to a person's name means that there is a notification email waiting to be sent.

To send out the notification emails, click the "Email" button next to a team (this will only email the team of 'Band' in the example above or click the "Email these people" button to send them for all of the people who are scheduled to this plan.

Choose Who to Email

Prepare An Email

Send Emails for

Scheduling Requests
Signup Sheets

1 Prepared Notifications

2 ✓ All Scheduled People

3 Needed Positions

With Status: 4

Unconfirmed

Confirmed

Declined

In Teams: 5 check all uncheck all

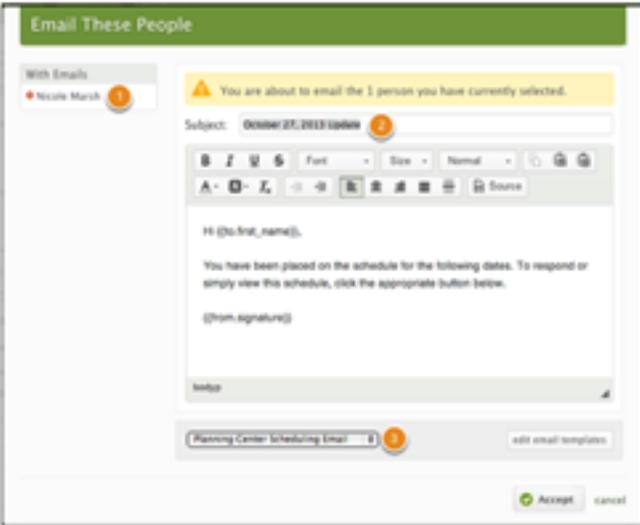
Band

Leader

Accept
cancel

1. Choose "Prepared Notifications" to only send to people with the email icons by their names.
2. Choose "All Scheduled People" to email any people added to the plan.
3. Choose "Needed Positions" to email people for [Signup Sheets](#). People assigned to needed positions in categories with Signups enabled will be emailed.
4. Select which statuses you want to email. This is not an option when emailing Needed Positions.
5. Choose which teams of people you want to email. If you clicked the "send" button under a team in the previous step, that team will be the only one selected, otherwise they will all be selected. Only teams with available people for the options you've chosen will be selected.

Click Accept to move on



1. You will see all the people who will be sent this email to the left. You can click the red minus sign next to their name to exclude them when sending the email, but you cannot add additional people.

2. Feel free to change the subject or email content.*

3. You can choose from customized [email templates](#) from the dropdown below the message. You can also [edit email templates](#) by clicking the edit scheduling templates button.

*Emails use the Liquid programming language (also used in our Custom Reports) to insert dynamic content into each email. When you send the email, Planning Center replaces each tag enclosed in double curly braces {{ }} with the appropriate content for the person receiving the email, like a mail merge. {{to.first_name}} will be replaced with their first name when the email is sent. You can also use {{to.last_name}} or {{to.name}}. You can edit your personal signature from [your profile page](#) and it will be inserted where you see {{from.signature}}.

The email sent will additionally include the information on which teams, Positions and specific Times they have been scheduled for. Unconfirmed people will have buttons to "Accept", "Decline" and "View This Service", and Confirmed People will only have the button to "View This Service".

Click Accept to send the email

Reminder Emails:

It is advised that the leaders set up automatic reminder emails within Planning Center that are sent to the volunteers the Friday before they are scheduled to work. Planning Center allows you to set up these reminder emails once and choose them to be auto-repeated.

Figure 5: Sending Reminder Emails to Volunteers

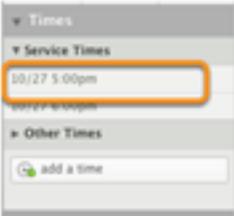
Setting Up Reminder Emails

You can send automated reminded emails up to 7 days before any time you have people scheduled for.

Click on the date or your plan.



Click on a date/time.



Each time that you have entered has its own reminder settings.

Set reminders for each Team.

Editing Time

Date: Time: to

Type: Name:

Assigned Teams		check all	uncheck all
<input checked="" type="checkbox"/> Sam Welcome Team	2 days before on Fri 11/9		
<input type="checkbox"/> Sam Welcome Team	No Reminder		
<input checked="" type="checkbox"/> Ushers	No Reminder		
<input checked="" type="checkbox"/> Audio/Visual	3 days before on Thu 11/8		
<input checked="" type="checkbox"/> Band	3 days before on Thu 11/8		
<input checked="" type="checkbox"/> Vocals	3 days before on Thu 11/8		
<input checked="" type="checkbox"/> Prayer Team	No Reminder		

Reminders go out at 10:00am

Update This Time In Future Plans

 Update Existing Scheduled People

Volunteers' Roles

The volunteers have relatively little interaction with Planning Center. They must complete two main jobs in order for the scheduling to run smoothly. First, once they have received a confirmation email of their login information they must log on and change their password. Next,

they must accept or decline invitations to volunteer that will be sent from their leaders via their provided email account. The steps to accepting/declining scheduled workdays are as follows.

Figure 6: Accepting/Declining Volunteer Assignments

Responding to Scheduling Emails

When you receive your email, click Accept, Decline, or View This Service.

planning center
Services
SCHEDULING

Hi Scott,

You have been placed on the schedule for the following dates. To respond or simply view this schedule, click the appropriate button below.

Thanks,

Scott Myers
Carlsbad Christian Church

November 17, 2015 1

Contemporary Service

Drums (Band) 2	
Services	Rehearsals
11/17 at 10:00A	Thur Band Rehearsal: 11/14 at 7:00P 3

Accept 4

Decline

5 [View This Service](#)

Anatomy of the Notification Email:

1. The banner through the middle of your email tells you the date and the name of the service you are scheduled for.
2. This shows you what position you're scheduled for.
3. Here all of the service, rehearsal, and any "other" times are displayed. These are times that your leader has made you responsible for.
4. Response Buttons: these large buttons prompt you to respond in some way. If you are an editor or administrator, clicking one of these buttons will require you to login (this is for security purposes). If you have other permissions, just click the button to respond.
5. This button gives you a link to view this plan without responding.

If You Decline:

We are sorry you are unable to serve for this position. Please let us know if you have a specific reason you can't serve.

Cancel
OK

If you are declining this service, it will give you the option to send a reason. If you do not want to give a reason, you still have to click 'decline and send reason' or 'OK' in order for this response to go through.

In order to keep track of the absentees each week, we propose a check-in station be created. Each of the volunteers will be asked to check-in upon their arrival at the church. Planning Center has the capacity for a check-in feature that is fairly simple to utilize. Once the check-in application is downloaded, it can be accessed via computer, iPad, or smartphone. The application can either be set up to allow volunteers to check themselves in or to have a single person checking everyone in. Not only would this make keeping track of absentees simpler, it would also track the time at which the volunteers are arriving, as well as from what team the absentees are most often occurring. This data would allow Evanston Bible Fellowship to easily identify problems within their volunteering group and run more fluently.

Figure 7: Outline of Check-In Function

Check-ins Basics

Check-ins consists of two different views. The "Admin" view, where people set up the system, and the "Station" view, which is the interface that is used when someone is checked in.

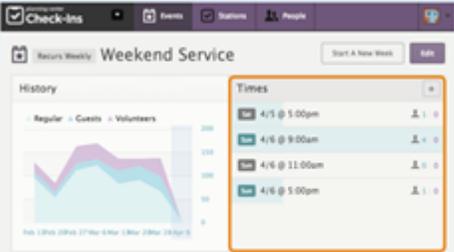
Admin View

1. **Events** - Events are the options that will show up when you are checking someone in. To learn more, click this article.
2. **Stations** - A station is a unique computer or device used to allow check-ins. It can be manned, with a volunteer needed to check people in, or can be set to allow any one to check themselves in without assistance. See this article to find out more.
3. **People** - There's a few ways to get people into your Check-ins System. Click this article to find out.

Station View

1. **Self Check-In Station** - A Self Check-In Station only allows you to find already added people by phone number or barcode. Because we want this station to be as secure as possible, we don't allow to search by name or add new people. If you want to make sure they can't get back into Admin View, make sure you log out of admin view, after you make that computer a station.
2. **Manned Station** - Manned Stations allow you to do everything a self check in station can do, but also allows you to search by name and add new people. To learn more about this, check out the article on [People](#).

Times



The times here are going to show up in Station view when you are checking someone in. You can see here that my Weekend Service stations has a Saturday night service, two Sunday morning services, and a Sunday evening service. Once the event has started you will see the graph live update to show you which time has the most people checked in.

Locations

Locations Attendance across all times +

Open Jr. High Room 1 0

Elementary School +

Open Class 205 2 0

Open Class 206 0

Pre School +

Open Infant Nursery 1 0

Open Toddler Nursery 0 0

2 Year Olds 3 +

Open Class 201 0 0

Open Class 202 0 0

4 Year Olds +

Open Class 204 0 0

It's very important to organize your locations into folders that make the most sense as this is how they will be organized in Station view. You can set these up in any way that you'd like. Here are a few examples.

1. All of my Jr. High kids meet in the same place, the Gym. Because it's in just one spot, I don't need to put it into a folder.
2. My Elementary School classes are separated into two classrooms. I've added a folder here to help organize that.
3. I have a large preschool, that meets in multiple locations. So, I've created one PreSchool folder, and multiple folders underneath to help organize them.

To add a folder or location, click the plus button.

New Location

Location Name Location Folder +

Age Range Grade Range

Labels for this location

(Event) Default Security Label (Dymo 30254)	1	Regular, Guest
(Event) Default Name Label (Dymo 30254)	1	Regular, Guest

Questions for Attendees

Questions are a yes / no format

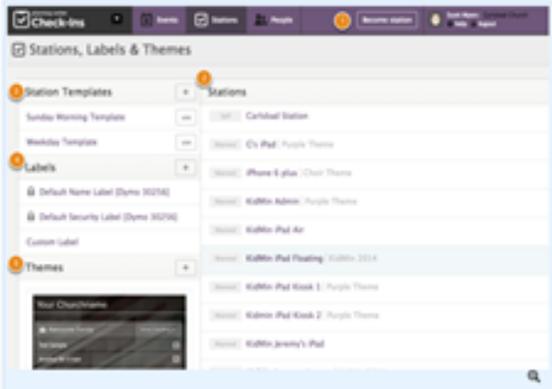
Delete cancel Submit

1. This will toggle between creating a new folder or a new location. You can set age ranges, grade ranges, questions and labels for either the location, or even the folder, which would make these for all locations within a folder.
2. When a specific age range or grade range is created, these locations will be suggested to the people who are within the ranges. For example, my child is 4 years old. When I go to check him in for the first time, I will get all of the suggested locations that include a 4 year old.
3. Each event, folder, or location can be assigned a label. These labels can be customized with the Dymo software and uploaded on the Stations Page. The types of labels chosen here is what will be printed when someone checks in. So, you can set a particular ministry like Jr. High to only have name labels, and set the Children's Ministry to have Name and Security Labels. Or you can set it to not print any labels if you'd like.
4. Each folder or location can also have Options that will show when selected from the Station view. These options will be printed onto the label, so you'll want to make them short, and necessary for everyone to see. Most common ones are "Potty Trained" or "Diaper Bag".

What is a station?

A station is a unique computer or device used to allow check-ins. It can be manned, with a volunteer needed to check people in, or can be set to allow any one to check themselves in without assistance.

Stations Dashboard



The Stations dashboard allows you to see all of the pertinent settings for all of your Check-in stations.

- To make the current computer you are on be a check-in station click this button
- Each station has a good amount of data listed there for you to see at quick glance
 - The first column shows if this is a volunteer Manned station or a Self Check-in station
 - If the first column is green, that means that station is currently online
 - The second column is the stations name along with which theme the station is currently setup for
 - The final column will show what the current event is, if there is one assigned
- Station templates allow you to change the settings for multiple stations at once so you can quickly change back and forth between a Weekend Setup and a Weekday setup
- Labels are the designs that you have uploaded. You can design your labels with the [Dymo Label Software](#). We provide some basic designs if you aren't ready to design your own.
- This is a list of all of your themes for use by your organization. You can have as many themes as you want and a theme can have a custom background image or color.

History



After a few weeks of data you'll start, seeing this graph come to life. You can see a progression of your weeks attendance, and skip to any week to see the people who have checked in on that date. All of this data is also live updated, so you'll see the changes in real time.

People



The people section will give you a live view of everyone who has checked in. V is for Volunteer, G is for Guest, and R is for Regular attendee. Click on a name to see more information including what Household they are in, their birthday and allergy information, and what exact time they checked in.

With the use of the Services, People, and Check-In functions of Planning Center, Evanston Bible Fellowship can greatly increase the ease of communication between leaders and volunteers regarding volunteer schedules.

Appendix D: Check-In Team Simulation Model

