� UU La Crosse
A Unitarian Universalist Fellowship

TECH TASK FORCE

SURVEY for Congregants, Leaders & Staff Members:

The purpose of this survey is to collect information in order to best choose new Church Management Software (ChMS). As a congregant, Team Chair, or staff person, go through these questions and answer the questions that apply to you. No pressure to answer everything. If you'd prefer to meet in person to talk about ChMS rather than filling out this survey, that works, too! See the reverse side to find a few examples of what ChMS can do for UU La Crosse. Don't be limited by our lists — think outside the box! If the language in the question does not apply to your group in particular, feel free to adjust as necessary.

- ▷ What **reports** do you *need* to be able to generate?

- ▷ What **reports** would you *like* to be able to generate?

- ▷ Do you need help with organizing **volunteers**?

- ▷ What does your Team or work area struggle with the most?

- ▷ What **inventory** does your Team or staff position keep track of for the Fellowship (ex: member attendance, A/V equipment, maintenance schedule, hymnals, RE students allergy info, etc)?

- ▷ Other application opportunities:

Software Features to consider while completing this survey:

- **Organize & Communicate with Groups**
  - Within and between teams
  - Announcements
  - Virtual meetings
  - Text program
  - Discussion groups/forums (Covenant groups)

- **Directory, Attendance Tracking, and Visitor Log**
  - Follow a visitor/friend on their path to membership
  - Log skills and interests of individuals (volunteer and communication purposes)
  - Track attendance of Sunday services, covenant groups, special events, RE, etc.
  - Event registration and management

- **Volunteer Coordination**
  - Sunday morning prep/cleanup (Hospitality team)
  - Tabling events
  - Schedule management

- **Space Rental & Inventory Tracking**
  - A/V equipment rental tracking (FM transmitters, A/V adapters)
  - Room usage requests
  - Team meeting scheduling

- **Integration with or Replacement of Existing Platforms Used**
  - Wordpress Website
  - Quickbooks?
  - Google Calendar
  - Constant Contact
  - Doodle (meeting scheduler)
  - Background checks

- **Track Giving & Generate Reports**

- **Policies & Procedures, Forms, Safety Checklist**
  - Expense Reports
  - First aid/CPR training session reminders
  - Reminders for monthly & annual tasks (B&G)
  - Time Sheets