Essential, Important, Nice to Have

A Tech-Needs Checklist

Valley Creek Church in Lewisville, TX, decided to switch technology providers. Their leadership team spent weeks collaborating on the digital issues they felt were necessary to address during the transition. What follows are the 130 points of emphasis their team decided would best serve their online ministry, community needs, and the Church as a whole moving forward.

COMMUNICATIONS

	CHOOSE PRIORITY LEVEL
Can send individual text or email messages from system	
Leaders can communcate via text or email to customizable people groups (groups, teams, other leaders, etc.)	
Track people's preferences for text messages, email, etc.	
Contact only those who signed up for a need, or through a form	
Can add images to email without hosting image	

Mobile

Has a mobile app, or capable of connecting to an existing custom app	
Track open rates and clicks	
Ability to make all front-facing web components brand compliant	

Mobile-alert push notification capability	
Users can register for events	
Mobile-friendly access for group leaders	

What does ***your*** church need? Scheduled notifications, interactive polls, user communication preferences...

EVENTS

Easy event planning and registration	
Track registration for events and payments	
Can delete groups and events	
Import online registrations without manual entry	
Simple approval process with few steps, simultationous approval flow	
Room is reserved instantaneously--doesn't require approval to be held while waiting for approval	
Facility, equipment, and ministry support calendar scheduler	
Calendar scheduler can feed events to ministry website	
Integration of dates with the staff's primary calendar (Outlook, etc.)	
Able to track inter-ministry resources	
Manage group time, type, location, availability, and visibility	
A single link for STMs and participants to register, with a campus indicator, that will automatically create an assignment or group	
Track missions trips (checklists, support, etc.)	

Check In

Register for events without login	
Add a visitor while taking attendance	
Check-in for serving assignments	
Check-in and check-out capability for minors	
Register kids for events before showing up to the church (Sunday services, etc.)	
Check in that can track allergies, allows check-out persons who are not in household, etc.	
Recommend children grade check ins based on age, once individuals arrive on-site	
Track individual attendance for weekends, events, gatherings, groups	
Attendance reports by ministry, event, serve team, serve team roles, date, space, and category	
Check in remotely by automatically using geofencing, or using geofencing as a critieria to remotely check in	
Can track attendance using geofencing	
Mobile tag printing option from phone	
Tags can print and reprint without duplicating check in, and allow for check in to multiple assignments on same day	
See total checked in and not registered, versus those who checked in and did register	
Post-serving event: see the total who didn't check in, but accepted their serve team assignment	
After any event, see total registered who attended or did not attend, by campus, age, gender, city, etc.	
Define recurring tasks and set reminders (report on attendence, follow-ups with individuals, etc.)	
SignupGenius-type functionality	

What does ***your*** church need? Add requests to published events, room and facility approvals, sending mass invites...

FINANCE

For Donors

Donors can view giving record and their check images online	
Able to give through text message	
Allow one-time gifts with or without creating a log in	
Donors can set up their own financial committment and make changes as necessary.	
Third-party giving app integrations (ApplePay, Venmo, Cash App, Zelle, etc.)	
Donor can run their own statements	

For Admins

Donor change notifications delivered to finance team through reporting, not push notifications	
Set up donor profiles for both people and for organizations	
Identify new donor gifts and automatically create a new profile, or migrate with exisiting profile	
Identify different types of donors (first-time giver, recurring donor, top-giver tag, multi-year giver, etc.)	
Allow recuring and/or scheduled gifts	
Can automatically import gifts received online	
Auto-match checks and envelopes to donor profile (name, handwriting, etc.)	
Checks and envelopes run through scanner once for both deposit and database entry	

Create restricted or unrestricted funds for pledges and committments	
Split a single donation across multiple funds and givers (e.g. a third-party check from multiple donors)	
Allow ACH and bank card gifts	
Can issue refunds	
Ability to reverse not-sufficient-funds (NSF) checks	
Automatic reversal of returned online gift	
Notifies contributor if an online transaction fails, or if their bank card has expired	
Edit historical gift detail (change fund, posting date, etc.)	
Tracks Gifts In Kind	
Gifts in Kind can satisfy giving pledges	
Export giving data to church's general ledger (GL) system	
Reconcilation between bank and GL system	
Intuitive donor analytic systems	
Statements can be customized and/or generated by the system	
Statements can be run for households, individuals, and organizations	
Send giving statements via email	

What does ***your*** church need? Custom thank you messages, celebratory animations for givers...

PEOPLE

Your Community

Intuitive account creation	
Users can update their profile data autonomously	
Delete inactivate profiles	
While registering, match to existing profiles to avoid new profile creation	
Auto-update individual statuses based on specific criteria being met	
Set cautionary flags based on person's behavior or legal issues	
Alerts based on personal data like multiple ministries, birthdays, leader journey movement, attendance gap, etc.	
Attach documents to profiles (consent forms, BCs, NDA, and other forms or paperwork)	
Assign grade promotions in bulk for children	
Features for new guest pipeline	
Features for lost-to-leader pipleline	

Groups

Group interest notifications	
Leader and member lists associated with groups	
Shareable lists of groups	
Group tracking, history, and reporting	

Background Checks

Includees a background check interface	
Identify roles that require a background check, and confirm if background check has already been performed	
Push notification of completed background check to ministry leader	
Automatic background check expiration report, or automatic rerun	

Service Team Members

Need a serve team scheduler and reminders	
Ability to create and delete assignments in bulk	
Participant assignment breakdown based on room, grade, service time, etc.	
Mass edit of STM assignments and info	
Accept or reject scheduling requests in bulk	
Find a replacement STM for an STM who accepted their assignment but can not serve	
A discipleship and prayer notes log, visible to all staff	
Mass add or remove STMs from groups, events, and scheduling	
Platform provides training videos for staff and STMs	
Features fo serve team pipeline	
Features for lost-to-leader pipleline	

Reporting

Includes a user-accessible, customizable report system	
Create reports for serve team members by role, team, ministry, and by campus	
Pull profile info, groups, and serve teams in one report	
Track benevolence	
Household engagement dashboard, breaking out the students versus parents track	
Reports have the option to report by campus and status (all-in, participant, etc.)	
Reports should be able to pull last-attended date across all events	
Ability to report on a group's campus, span of care, type, schedule	

What does ***your*** church need? Intuitive data dashboards, nurture stream functionality, streamlined profile updates across systems...

SYSTEMS AND IT

Customize level of access per user, controlling who can see donor information or other sensetive fields	
Automate monthly list of users with access to personally identifiable information and/or transactional information for cleanup	
Map profile info to identify potential duplicates before creating a new profile	
Users can integrate their Facebook or Google credentials to log in	
Functional with multiple campuses	
Multiple concurrent admin access	
Makes data accessible in real time via mobile devices	
Pull summary reports on mobile devices	
File retrieval and file push	
Require login to view any giving-related activity and other personally identifiable information	

Tech Simplicty and Security

Assistance importing outside data into new platform	
An open API for custom integrations	
Supports a web browser interface	
Data is accessible and exportable in multiple formats (Excel, CSV, PDF, etc.)	

Provides an Excel PivotTable interface	
Encrypted data transmission	
Hosting datacenter is certified Tier 3 or higher	
Maintains transactions database for users who make donation changes (an audit log for who made changes and when)	
Proof of ISO-27001 certification or alignment to controls	
Graphics-capable dashboard with drill-down capabilities	

What does ***your*** church need? PCI-DSS Compliant Level 1 for processing payments, machine-learning fraud protection...

Click here to access the excel file version of this checklist so you can add, change, and share your new version easily with staff.

Find The Right Tech For Your Ministry

Now that you know exactly what your team needs, see what Pushpay has to offer. Connect with one of our tech experts or take a self-guided tour of our Giving, ChMS, and Mobile App products.

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