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Advance Your Knowledge
Webinar Series

Tracking Volunteers Using ChMS Scheduling
And Worship Planning

Welcome

Please take a moment to locate the Zoom Webinar controls.
Feel free to say hello or ask a question using the Q & A feature.

Welcome – Introducing our Panelists

Mark Crain
ShelbyNext Trainer

Staci Sampson
ShelbyNext Trainer

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ChMS Schedules

Schedules allow administrators to do several items:

- Create or edit plan templates

- Create a Schedule for a specific date/time

- Add individuals to a schedule (or copy from a past schedule)

- Send invitations and track responses (automatically or manually)

- Communicate with scheduled individuals

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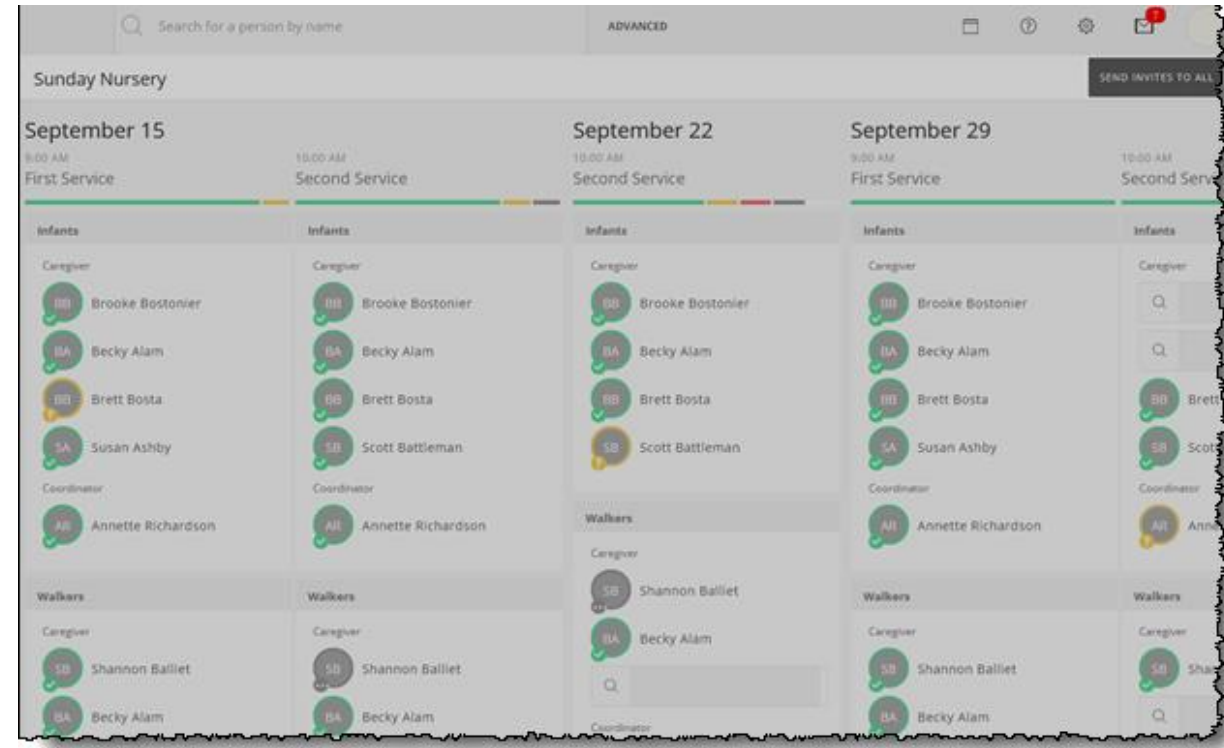
Create a Schedule

- To create a new schedule, click on the Schedules menu item, then the Create a Schedule button. **Create A Schedule**

Create a Schedule

- Schedules allows for multiple sets of volunteers to serve at multiple times on the same day.

- Add as many times per day as needed.

- "Teams of volunteers" can cover specific subgroups, like classes, with more than one person/position

- "Just volunteers" are for single positions filled by as many people as you may need.

When do you need volunteers?

Time Name

Start Time   End Time

9:00 AM   10:00 AM

+ Add Another Time

Tell us about the volunteers you need.

Teams of volunteers or just volunteers.

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Create a Schedule

- Three important designations for each position
  - How Many of that position are needed
  - Source Group
    - Instead of searching your entire ChMS database, you can limit available volunteers down to a specific group.
  - Require Background Check
    - Only volunteers that have a completed Protect My Ministry background check will appear.

Position Name	How Many	Source Group (Optional)
Helper	2	

☐ Require Background Check

Scheduling Volunteers

Schedule Day Options

November 14, 2021 🔕 **...**

Copy Volunteers from Previous

Send Invites

Mark All as Confirmed

Contact November 14, 2021 Volunteers

Edit Date

Remove Day

Add Details

COPY VOLUNTEERS ✕

November 14, 2021 ⌃

November 14, 2021

November 7, 2021

October 31, 2021

DETAILS FOR NOVEMBER 14, 2021 ✕

Details

B *I* | ≔ ≔ | 🔗 🔗

Use Schedule Details to update volunteers on information around the event(s) that are serving for. Include details on protocols and lesson information available to the team.

☐ Apply Changes To Future Schedules

Cancel **Save**

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Managing Schedules

- Searching for Volunteers
- Send Invites to All
  - Email address REQUIRED!
- 5 Distinct Status Messages
  - Not Notified
  - No Email Address on File
  - Notified
  - Confirmed
  - Declined

Reminders

REMINDER FOR NOVEMBER 14, 2021

✕

⬤○ Reminder ON

Send As

◉ Email ⬤ SMS Text ⬤ Email & Text

☐ Include Pending ⚠ 2 Missing Contact Info ❯

You are scheduled to serve Nov 14, 2021 for Children's Classes. For details, you can view your schedule here

| 1 day ⌄ | before at | 10:00 am ⌄ |

+ Add Reminder Time

☐ Apply Changes To Future Schedules   **Cancel**   **Save**

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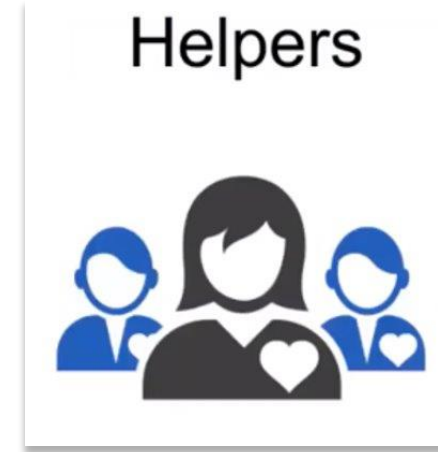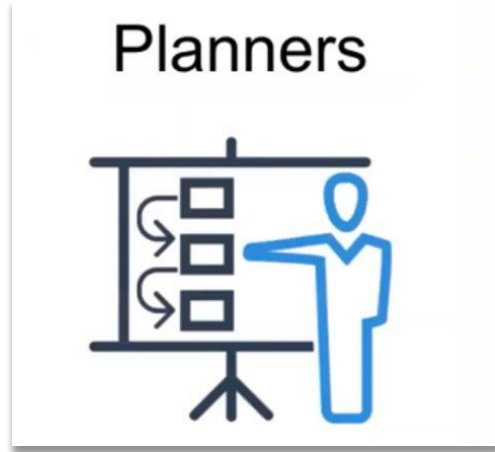# Worship Planning

Integrations

ChMS Integration:

- Make a master group of volunteers to import in

SongSelect Integration:

- Allows all planners to have access to one SongSelect account.
- **Note:** Planners can also sync individual accounts from their My Profile page.

Planners & Helpers

Planners

Helpers

•Creating and Adding Content in Worship Planning...

•Up to 5 Planners for free

•**Unlimited** number of helpers

•***Helpers are everyone else*** and need access to Worship Planning to view information that's helpful for them (i.e., volunteers that are filling Roles)

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Roles/Skills

Set roles that will be used in assignments for a particular person.

You can also define what skills are needed for that role.

Roles / Skills

ADD A ROLE

These roles are used with pe[...]

Name	Icon	Description
Acoustic Guitar		
AV		Running tech in the background
Bass Guitar		
Drums		
Electric Guitar		
Keys		
Lead Vocals		
Vocals		

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Teams

Allows you to:
- Set notifications, reminders, & responses
- Assign Members, Leaders, & Roles
- Create templates to use in service planning
- View a calendar of availability
- Upload files

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Events

All Events

+ CREATE NEW EVENT(S)

Services in Location ALL LOCATIONS

🔍 location, series, topic, etc

From	To	
Oct 31, 2021	Nov 28, 2021	FILTER BY DATE

Date/Time ⌄	Linked To	Series	Topic	Updated By	
Sun, Nov 7 - 10 AM		Long Story Short	Week 1: The Beginning	Staci Sampson	✏ 🗑 📋 📋 📋
Sun, Nov 14 - 10 AM		Long Story Short	Week 2: Abraham	Staci Sampson	✏ 🗑 📋 📋 📋
Sun, Nov 21 - 10 AM		Long Story Short	Week 3: Issac	Staci Sampson	✏ 🗑 📋 📋 📋
Sun, Nov 28 - 10 AM		Long Story Short	Week 4: Moses	Staci Sampson	✏ 🗑 📋 📋 📋

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Events: Event Flow

Nov 7, 2021 · 10:00 AM @ Sanctuary

··· More Event Information   ⌄

EVENT FLOW   ASSIGNMENTS   STAGE SETUP   REHEARSAL

≡ Start   Element Type   Title   Leader

⌄ 9:55 (5m)   Exciting Video Countdown ✕   ◯ Lisa Currie - AV   ✕ =

Service Start ─── =

⌄ 10:00 (1m)   Greeting ✕   =

Worship Set 🗑 ────────────────────────────────────── =

⌄ 10:01 (4m)   Worship Song ✕   ♪ A Greater Song   ✕   ◯ Lead Vocals   ✕ =

⌄ 10:05 (4m)   Worship Song ✕   ♪ A Mighty Fortress Is Our God (Ein Feste Burg) ✕ ◯ Lead Vocals ✕ =

⌄ 10:09 (5m)   Offering ✕   =

⌄ 10:14 (4m)   Worship Song ✕   ♪ 10,000 Reasons (Bless The Lord)   ✕   ◯ Lead Vocals ✕ =

Sermon 🗑 ─── =

⌄ 10:18 (30m)   Sermon ✕   =

⌄ 10:48 (10m)

- Set the **Duration**, **Element Type**, **Title**(*for songs*), and **Leader** for various parts of the event

- Notes can be left on each Element

- Drag and Drop organization

- Templates!

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Events: Assignments by Service

Assign by:
- Entire Team
- Team Template
- Individuals
- Roles

Once assigning is done, click Send Notifications:

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Events: Assignments by Multiple Services

Managing Assignments

My Assignments

Helpers (volunteers) can manage their schedules:
- Accepted, Declined, or mark as Tentative assignment requests
- Mark preferred availability

Which is Right for Me?

ChMS Schedules

- Allows you to <u>simply</u> schedule your people

- Built directly into ChMS

- If you are not responsible for planning services, focus on volunteers only

Worship Planning

- Allows you to set <u>detailed</u> plans

- Integrates with SongSelect

- If you are responsible for all of volunteer management INCLUDING planning worship services

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Where can I watch this video again?

Watch or Register to attend Webinars

@ Community.Shelbysystems.com

Now Including Slides to Download

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Next "Advance Your Knowledge" Webinar

Useful Tips Regarding Giving Statements

January 12, 2022

Time: 3pm E/2pm C/12pm P

In this webinar, your presenters will lay out several things to remember when preparing for, designing, and sending out Giving Statements to donors. Whether you track pledges or not, snail mail or email statements, or use Arena, ChMS (ShelbyNext Membership), or Online Giving, there will be good information to benefit your processes. Join Staff Trainer duo, Ben Lane and Mark Crain for a quick look at Useful Tips Regarding Giving Statements.

https://ministrybrands.zoom.us/webinar/register/WN_Yt0lziZRRSu98DwSeFQrAg

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Virtual Workshops

Financials 101 & ChMS 101 Virtual Workshops will return with some new features in 2022
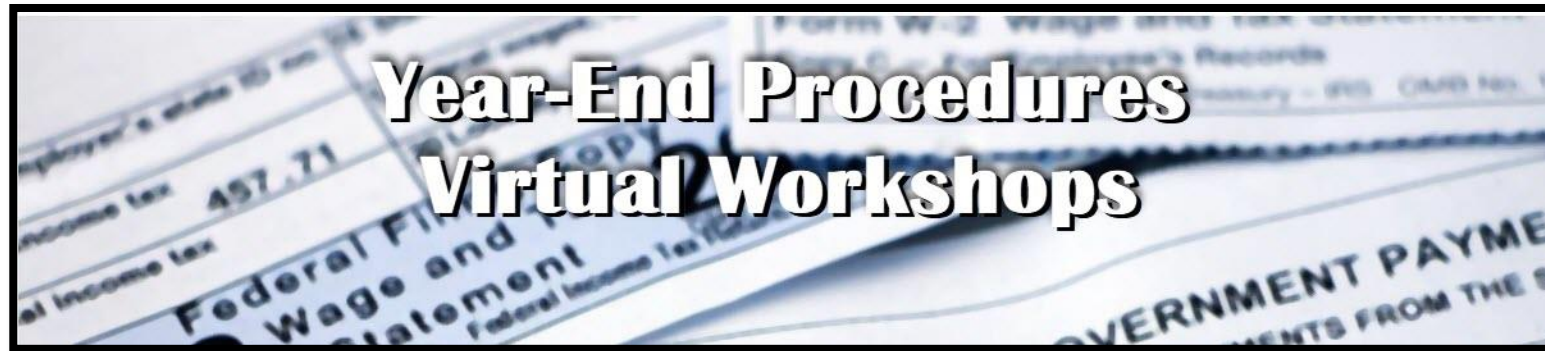
New for December and January, we will be offering a two-hour workshop covering the essentials of **Year-End Procedures**. To accommodate your schedule and to keep the sessions smaller, we will be offering this workshop on most Tuesdays and Thursdays during these two months.

- **Low cost** - $50 per attendee
- **Virtual Classroom Environment** – small group with interactive discussion and lecture
- **A Detailed Workbook** – step by step guide to many of the most common procedures
- Sign up now or watch for an email with more info next week

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Virtual Workshops

New for 2022

201 Virtual Workshops for those who are beyond the basics and who need extra tips, tricks, best practices, and maybe even some outside the box thinking. These workshops will be presented weekly as separate sessions that can be purchased individually or as a set.

Shelby 201 Virtual Workshops

ShelbyFinancials 201	ChMS 201
• 201 General Ledger • 201 Accounts Payable & Bank Account Management • 201 Payroll • 201 Financial Reports	• 201 Record Management • 201 Groups & Volunteer Management • 201 Forms • 201 Giving & Online Giving

Watch for details soon . . .

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Resources

Contact links that are provided in this webinar are unique to Shelby Systems. If you are watching this and use one of our sister companies Giving or ChMS products, please connect with your Success Representatives or Support Team.

Training@shelbyinc.com

Worship Planning Overview

Worship Planning 101

Create a Schedule Template

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