

Replacing Church Helpmate

Current Situation

Church Helpmate (Helpmate) is a software program that serves as a database for parishioner data, pledges and contributions. Helpmate is used to prepare a record of donations, parishioner contribution statements and the parish directory.

In 2016 ACS Technologies purchased Helpmate. ACS will discontinue support for Helpmate at the end of 2017 and recommends converting to their Realm software solution.

While Saint Mary's may continue to use Helpmate after support is discontinued, the church is at risk if a problem occurs that requires support or if the church replaces or upgrades its computers or Windows software.

Saint Mary's should consider replacing Helpmate.

Replacement Options

Helpmate is software that was purchased and resides on Saint Mary's computers. One option is to purchase software from another company and run that software on the church's computers. Another option is purchase "Software as a Service" (SaaS), also known as cloud computing. With this option the software and church's data reside on the provider's computers, not the church's computers. The church accesses the software and data through an Internet connection.

The cost to purchase software generally includes a one-time payment to purchase the software plus fees for support and software upgrades. When purchasing software as a service you are generally charged an ongoing monthly fee, which includes use of the software, data storage, support and software upgrades. Some providers base their fees on church size such as active members or average weekly attendance. Others based their fees on the number of modules used such as membership, contributions or attendance.

There are many companies that offer church software solutions. Most offer similar functionality that include:

- Membership Management
- Contributions and Pledges
- Communications
- Reporting
- Scheduling and Facilities Management
- Managing Groups
- Event Management
- Attendance Tracking
- Check-In
- Accounting

- Event Registration (SaaS only)
- Parishioner Self-Service (SaaS only)
- Remote and Mobile Access (SaaS only)
- On-line Giving (SaaS only)

When selecting software you are making a long-term commitment. It is important to determine what functionality you need when the software is implemented and how your needs may change and grow over time.

Two articles, Capterra “20 Most Popular Church Management Software Solutions” Aug. 2016 and Ministry Business Services, Inc. “Church and Donor Management Software” Nov. 2016, discuss 52 church management software solutions. After a top-level review and screening 11 solutions may warrant additional review as possible replacements for Helpmate.

<u>Providers</u>	<u>Purchased Software</u>	<u>Software as a Service</u>
Realm		X
CDM+	X	X
Church Office Online		X
ChurchTeams		X
Church Windows	X	X
Excellerate	X	X
Fellowship One		X
Icon CMO		X
Ministry Tracker	X	X
Roll Call	X	X
Servant Keeper		X
 <u>Estimated Costs</u>		
Software	\$500-\$1,500 One-Time	\$30-\$80 Per Month
Upgrades	?	Included
Support	?	Included

Questions to Consider When Selecting a Software Solution

1. Is the provider continuing to enhance, support and upgrade the software?
How often are software upgrades release and/or required?
2. Is the provider going to be a long-term player? Are they financially strong?
How long have they been in business? How many employees do they have?
Are they professionally managed?
3. What are the quality, cost and availability of training and support?
4. What is the quality of the IT function? Is the physical environment for hardware and software well protected and secure? Is data backed-up on a

- regular basis? Are the computers and data well protected against unauthorized access? How is personal identifiable and financial information protected? Are there up-to-date Disaster Recovery and Business Continuity Plans in place? Are software upgrades and security patches implemented on a regular basis?
5. Is remote access to software and data necessary or desirable?
 6. Is on-line access for parishioners or volunteers necessary or desirable?
 7. Does the software have good reporting and data query capabilities?
 8. Does the software have the capability to produce parish directories?
 9. Does the software have audit trail capabilities?
 10. What are all the fees (on-going and one-time)? (Software, upgrades, support, training, set-up/implementation, data conversion, etc.)
 11. How frequently do fees increase? What has been the history?
 12. Is a demo available?
 13. Is there an interface with QuickBooks?
 14. What are the standard reports? Examples.
 15. Is there any limit on the amount or types of data that can be migrated to the new system?
 16. What is the process for data conversion, set-up and go-live?
 17. What are the common pitfalls or trouble spots that clients experience when implementing the software?
 18. Does the software support check scanning/remote deposit?

If considering SaaS:

1. What are the availability, speed and reliability of your Internet connection and service?
2. What is the provider's Privacy Policy?
3. Does the provider sell or share any data with anyone?
4. Do you own your data?
5. If you change providers, is there a fee to obtain or transfer your data to a new provider?
6. Has the provider ever had a data breach?
7. How often and for how long does the provider take the system down for maintenance?
8. Has the provider experienced unscheduled outages, if so, how many and for how long?
9. Is the provider's data center certified or rated?