Evaluating and Updating Technology at Shadow Rock Congregational Church:

Abandoning a Twenty-Three-Year History with Church Windows and Converting to Two

New Systems—Amplify ChMS and ShelbyNext Financials

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Abstract

This project chronicles the technology transition at Shadow Rock Congregational Church to improve efficiency and stewardship through the implementation of Amplify ChMS and ShelbyNext Financials. The goal was to replace outdated, fragmented tools with reliable systems that streamline workflows, enhance collaboration, and support ministry across the church, preschool, and related entities. Rooted in a theology of economy and stewardship—the care and ordering of God's household—this work approached technology as a form of ministry, an opportunity to increase transparency, accessibility, and care in how we serve. Through research, vendor evaluation, and collaboration, new structures were developed for communication, data integrity, and operational efficiency. Along the journey, the scope grew to include and prioritize financial management systems. The process also invited reflection on how faithful administration and digital transformation can share a common purpose: equipping a progressive, forward-looking congregation to live its mission more effectively. The results demonstrate that intentional planning and thoughtful use of technology strengthen both the practical and spiritual life of the organization, creating capacity for continued growth, connection, and service.

Keywords: financial management, information management, technology transition, church administration, Amplify ChMS, ShelbyNext Financials

Purpose Statement

The purpose of this project, *Evaluating and Updating Our Technology at Shadow Rock Congregational Church*, is to strengthen our ministry through improved information and financial management. By modernizing our systems, we will reduce manual processes, automate administrative workflows, and provide staff and lay leaders with timely access to data that supports faithful decision-making. These updates are essential for our small staff of three to devote more time to programming, pastoral care, and long-term sustainability.

Shadow Rock Congregational Church, a member of the United Church of Christ, was founded in 1973 (Kreider & Heintzelman, 2023). It has a solid nucleus of longtime members who are dedicated to supporting our life together, embracing our core values of inclusion, justice, and spirituality. We proclaim each week: *"No matter who you are or where you are on life's journey, you are welcome here."* Our covenant calls us to be "…. that sensitive and responsive part of human society which perceives and responds to God's newest thrust in the midst of history". From an administrative perspective, that thrust includes the responsible use of technology to connect, communicate, and serve.

Our ministry goals are to nurture relationships through love and community, embody diversity and inclusion, serve as a spiritual center for social justice, point to the golden rule in uncertain times, and build the infrastructure to support our vision. This project directly supports the final goal—creating infrastructure and resources that enable our mission (Shadow Rock Search Team, 2025).

I currently serve as Director of Operations, formerly Chief Financial Officer, and have been part of the Shadow Rock staff since 2003. Over the past two decades, I have led initiatives to improve efficiency and integrate technology, including outsourcing payroll, restructuring the

chart of accounts, implementing electronic giving, and consolidating financial reporting across

the church and preschool. These upgrades and improvements revealed that our legacy Church

Management Software (Church Windows, implemented in 2001) no longer met our needs.

As membership and staffing levels have changed, our need for efficient, connected

systems has grown. The selection and implementation of a new Church Management System

(ChMS), followed by upgraded accounting software, represent both a technical and spiritual

renewal—aligning our administrative structure with our covenantal call: "We covenant one with

another to be that sensitive and responsive part of human society which perceives and responds

to God's newest thrust in the midst of history" (Shadow Rock United Church of Christ, n.d.,

para. 1).

Through this project, I was able to affirm that embracing new tools is not merely a

logistical task but a ministry act: a way to respond to God's presence in the changing landscape

of church life, empowering us for the future.

Theological Rationale for Project

It is not uncommon for people in a church to experience tension between the mission and

the business sides of ministry. This dynamic often appears in the relationship between a senior

minister and a business administrator. The business side asks necessary questions about where

funds originate, how financial obligations are met, what practices ensure legal and ethical

accountability, and what constitutes good stewardship. The mission side insists that, as long as

there are hurting and hungry people, the church must act rather than analyze and should not hold

excessive reserves. A person in my position on a church staff can easily find themselves caught

in this tension. Yet this does not need to be the case. A strong theological rationale provides

common ground where faithful mission and responsible management are not in opposition but are partners in ministry.

In *God the Economist: The Doctrine of God and Political Economy*, Douglas Meeks challenges the Church to interpret economic life through a theological lens (Meeks, 1989). Meeks argues that Christian theology must engage critically with economic systems, particularly capitalism, which often prioritizes profit, control, and individualism over community and compassion. Reinterpreting the doctrine of God through the Trinity and the Kingdom of God, Meeks describes God's nature as relational, mutual, and generous. This view offers a theology of economy grounded in abundance rather than scarcity. In this sense, God as "economist" does not manage resources for gain but orders the household of creation toward justice, generosity, and life shared in community.

The word *economy* itself originates from the Greek *oikos*, meaning "household." In the biblical sense, *oikos* refers to all aspects of a household's life—the people, resources, and relationships that make up its daily function. The care of the household is therefore inseparable from the care of its people. In church administration, this means that mission and management meet in the shared responsibility of tending to God's household. Dietrich Bonhoeffer's reflections in *Life Together* echo this idea: Christian community is a shared life under one roof, lived through accountability, service, and stewardship (Bonhoeffer, 1954/2009).

In John 14:2 (NRSV), Jesus assures his disciples, "In my Father's house there are many dwelling places," revealing a divine economy of welcome and expansion. Although this passage is often read at funerals, its original cultural context offers a vision of joyful growth—when a son married, the father added a new room for the couple, extending the household. The Father's

house grows through love and welcome. Jesus' metaphor speaks to the church's responsibility to make space for others within the household of God. At Shadow Rock Congregational Church, this vision resonates deeply with our covenant, which calls us to radically affirm each person's uniqueness and to act in ways that engage all people meaningfully. Inclusion is not an add-on to mission; it is part of the divine economy. As God expands the household, so too must the church widen its circle.

A second passage that informs this project is the cleansing of the temple in John 2:16 (NRSV), when Jesus commands, "Stop making my Father's house a marketplace!" This moment reminds the church that sacred systems lose their integrity when profit or control overshadow purpose. The offense was not the presence of ritual or exchange but the distortion of holy intent. For those in administrative ministry, this passage is a warning against allowing institutional maintenance to eclipse mission. When we lose sight of the reason for our structures, even well-intentioned systems can become idols. Faithful administration keeps the church's "house" in order without mistaking the house itself for the heart of God.

This idea connects directly to the church's theology of stewardship. Stewardship is not simply fundraising but a spiritual practice of gratitude and accountability. Luke 14:28 (NRSV) reminds disciples, "For which of you, intending to build a tower, does not first sit down and estimate the cost?" Careful budgeting and transparent reporting are not acts of distrust but of faithfulness; they ensure that the community's resources serve the mission rather than burden it. At Shadow Rock, our technology transition project embodied this principle by aligning our information systems with the church's mission. Automating workflows, improving transparency, and strengthening collaboration allowed staff to spend less time on administrative tasks and more

time engaging people in ministry. This is stewardship in practice—managing resources wisely so that mission can flourish.

The Apostle Paul echoes this integration of mission and management in his guidance to church leaders: "If someone does not know how to manage his own household, how can he take care of God's church?" (1 Tim. 3:5, NRSV). Although the passage reflects patriarchal cultural assumptions, its underlying wisdom remains relevant. Leadership in the household of God demands integrity, accountability, and balance. Effective church administration is an extension of pastoral care—ensuring that the structures sustaining ministry are healthy, transparent, and mission-focused.

The United Church of Christ's covenantal theology provides an important context for this integration. Covenant emphasizes relationship over hierarchy, calling each congregation to discern how best to live faithfully within its own household while remaining connected to the wider church. In that covenantal spirit, administrative leadership becomes an act of partnership, not control. Stewardship, inclusion, and justice are expressions of covenant—practical ways the church lives out its promises to God and one another. Theologically, this means that decisions about finances, staffing, and technology are not separate from the church's spiritual life but expressions of it (United Church of Christ, n.d.).

At Shadow Rock, our covenant declares that we strive to be sensitive to God's presence in history, affirm each person's uniqueness, and engage all people in meaningful ways. This project, while technical in nature, was shaped by those commitments. Implementing integrated systems was not merely a modernization effort; it was an embodiment of our theology—a way to

ensure that our administrative life reflects our inclusive and justice-seeking mission. Faithful management of God's household is itself an act of worship.

This inclusive vision also echoes Shadow Rock's *Three Campfires* metaphor, which imagines the congregation as a clearing where people of differing beliefs gather around the same table of grace. The well-worn paths between the campfires symbolize the spaces where we meet one another and practice community. This image has shaped our understanding of technology as a ministry tool—creating systems that welcome everyone into the shared work of connection, care, and inclusion (Shadow Rock United Church of Christ [UCC], 2024, April 10).

This theological rationale affirms that the so-called tension between mission and business is not a contradiction but a creative intersection. The biblical vision of *oikos* unites care for people and resources within the same household. Meeks' theology of God as economist, the teachings of Jesus on household and stewardship, and the covenantal commitments of the United Church of Christ all point toward the same truth: faithful administration is ministry. When the church aligns its systems, structures, and finances with its mission, it participates in God's own ordering of creation—a household marked by justice, generosity, and inclusion.

Practical Rationale for Project

As noted in the purpose statement, I have embarked on numerous changes and upgrades to Shadow Rock's financial systems over the past 20 years. However, my biggest challenge was our legacy ChMS, Church Windows (CW). After using it for only a year, I realized it was software designed by people who did not have any financial background. That is not necessarily bad for someone who does not have a financial background, but it is problematic for those who

do. In fact, when I had a specific accounting question, there was only one person on their customer support staff who would be able to answer questions.

In the book *Church IT*, Nick Nicholaou identifies one common mistake churches make—to choose a solution based on another church's referral rather than finding a "best of class" solution (Nicholaou & Smith, 2024). This is how Shadow Rock ended up with CW at the turn of the century. In hindsight, continuing to rely on Church Windows had become a sacred cow, a long-standing practice protected by familiarity and institutional memory rather than by its ability to support the church's evolving mission and operational needs (Church Law & Tax, 2024).

I have been searching for a new database since 2006, continuing to use CW despite its limited functionality, because it was the only program available that combined a membership database, donor records, and fund accounting at an affordable price. To be clear, CW is a comprehensive solution that has a definite value in the market. Sometimes you get what you pay for; CW was adequate. I often joked that we had the Kia of ChMS and we could not afford the Rolls-Royce, Shelby Systems. The other options out there had more database functionality, but every option I found was missing the most important piece—integrated fund accounting.

Over my 20 years using CW, there have been very few upgrades. The largest change was the ability to import donations from a third-party vendor (Vanco), which happened over 10 years ago. However, no other importing features were even in the plan. When I asked, I was told they would add it as a feature suggestion. This, coupled with the fact that CW does not attend The Church Network (TCN) trade show, made me realize that CW is not adapting to the future, and it was time to make a change in our ChMS.

I was hesitant. My history was that every time I got excited about a potential new ChMS, I found out they did not have integrated accounting. Typical sales associates would say, "You don't need fund accounting—just use QuickBooks," which was frustrating. Reliable systems were required to maintain transparency, meet compliance expectations, and support collaboration among staff, volunteers, and leadership. From a practical standpoint, the transition to a modern, integrated system was essential to sustain effective ministry.

The church faced a clear organizational need: to modernize outdated systems and automate manual processes to maintain ministry effectiveness with a reduced staff. This project addressed that need by implementing innovative technology solutions to enhance accuracy, efficiency, and access to data.

Measurable outcomes include reductions in administrative hours spent on data entry and reconciliation, the elimination of duplicate manual reporting processes, and improved donor communication and financial clarity. These improvements will give the staff greater capacity for ministry-related tasks. Shadow Rock members and the wider community will benefit from these technological updates through direct access to their donation profiles and, eventually, by engaging with membership through the integrated church app available in Amplify (Ministry Brands, n.d.).

Collectively, these outcomes demonstrate how technology, when aligned with mission, can enhance both the operational and spiritual vitality of the congregation, allowing more time and attention to focus on inclusion, justice, and spirituality in action.

Project Description

Background and Context

Shadow Rock's original ChMS, Church Windows, was implemented in 2001. As a busy church administrator, I was frustrated by the systems we had in place, but I was unable to find resources or colleagues that could offer help.

I learned about The Church Network (TCN, formerly NACBA) in 2010 from Craig Weister, CCA Emeritus and his Friday Epistle Newsletter. Through this relationship, he educated me about TCN, told me I should pursue my CCA, and encouraged me to attend The Church Network's National Conference. My Senior Minister, Rev. Kenneth Heintzelman, who likes to be called Pastor Ken, highly encouraged me to build relationships in TCN. Because I had a young family and the time and expenses related to attending certification in person, I could not seek my CCA until Covid hit in 2020 and Modules A and B were offered virtually. In 2023, we found out the National Conference would be in Dallas, the closest location to Phoenix that I had seen in recent years. Pastor Ken went to our Board of Directors and advocated for me to take advantage of this opportunity and asked them to fund my participation in the conference.

At the TCN Conference Vendor Fair in Dallas, I visited multiple booths, one of which was Ministry Brands new launch, Amplify (Ministry Brands Amplify, 2025). This ChMS looked like it had everything! I asked the Amplify salesperson if it included integrated Fund Accounting and was told yes, so I booked an information session. Once I had seen a couple of demos, I found out that accounting was "coming" with an expected launch of Q1 2024. In the meantime, I called CW to inquire why they were not in attendance at the TCN Conference. The response was that they used to attend but no longer choose to participate. As mentioned in the practical rationale,

the lack of upgrades and improvements were an indicator CW was not invested in improved client functionality.

Although Amplify was not truly integrated with the accounting module, I saw enough other positives that I approached the Board of Directors with the recommendation that we take a leap of faith and enter a contract with Amplify. They wholeheartedly supported my recommendation, and we signed a contract in August of 2023. The plan was to get our data extracted from CW, for me to get training on the new system and launch the database and switch our Electronic Giving from Vanco to the Amplify in-house provider.

Initial Planning

Project management began in Fall 2023 under the guidance of Ministry Brands project manager Mary Chavez who collaborated with me to set goals and timelines. She would be my dedicated trainer within the Amplify Database. The first step was for her to understand how we were using CW so that we could design the data conversion. The goal was to migrate the donor records from CW to Amplify so we could begin using the Giving Module to record donations January 1, 2024. Once the new database was complete, we did a test data migration for the past five years to see if donor records and information were populating correctly. The test did not go well.

The first discrepancy I discovered was that Amplify was not tracking donor gifts to pledging records. This was a big failure point. There were other smaller issues as well. Amplify took every record and assigned the primary member as "Primary" and secondary member as "wife." In CW, every person's membership status is associated with a membership classification, or tag. These tags were imported to Amplify as a data point. What I did not realize was that in Amplify membership needed to be tracked as a group. I was changing tags but there

was no way to run reports with the tags, so I had to learn to manage people in Amplify using groups. This was one of many new orientations I had to align myself to in the program.

One incredibly positive effect was that I no longer had to track electronic giving into a holding account to match bank reconciliations. In CW, I had to post all donations to donor records. Anything that was electronic giving, either ACH or Credit Card (CC) had to be posted to a holding account (Asset) and then once the transaction cleared the bank, I had to credit the holding account, debit the processing fees and debit cash for each individual donation that hit our checking account.

Once the test data was imported and I was checking donor records, I realized that to move fully into the automation and improved systems I needed to explore the Accounting Module. This placed a pause on the people and electronic giving focus. Mary spoke highly of ShelbyNext Financials (Shelby), referred me back to the sales department and I scheduled a demo. I was excited about the change, but when I sat through the demo, the accounting module User Interface (UI) looked as old-fashioned as CW. Amplify is bright, colorful and has a very modern and easy to use UI. Shelby felt sterile, reminding me of columnar ledger paper. I was very disappointed and wasn't sure how to move forward. Why would I go through the pain of learning a new system that wasn't any better than what I already had? This was a setback I did not anticipate. People view our positions as administrators as analytical and non-emotional arenas and forget that we are people with feelings who are passionate about our work and the work of the church.

I met with Pastor Ken to discuss my concerns. He challenged me to remember why I had decided to take a leap of faith on this new model. Pastor Ken encouraged me to schedule another

meeting with Mary. She listened to my concerns with the UI, but reassured me that the functionality, once incorporated, would allow me to continue to streamline processes and efficiency. Although I was unsure, I trusted this sage advice.

On December 8, 2023, I signed a contract to switch our accounting platform to ShelbyNext. This move pivoted the entire focus of the technology upgrade to the conversion to the new Accounting Module. The goal was to get the ShelbyNext Financials designed and deployed by March 31, 2024.

Implementation and Challenges

Change inevitably brings challenges. Transitioning to Shelby required revising the Chart of Accounts and data mapping. Sometimes, starting from scratch can be easier than migrating data between systems, as it avoids the complications of forcing one structure into another. Shelby Accounting was straightforward in terms of account structure, especially compared to the database move to Amplify ChMS. The chart of accounts required a different setup, and the numbering format for each account had to be adjusted to align with the new system's specifications. In CW, each account had root structure as follows: X.XX.XXXX:

- X=Account Type: 1=Asset, 2=Liability, 3=Fund Balance, 4=Income, 5=Expense.

- XX=Fund Number: 10-General Fund, 20-Memorial Fund, 30–Pastor's Charitable Fund, 50-Facilities Fund, etc.

- XXXX=Departments: 2000-Senior Minister, 2400-Staffing, 2600-Tech, 3000-Facilities, 4500-Children's Programming, etc.

I had developed an in-depth familiarity with the General Ledger (GL) codes after two decades of working with Church Windows (CW), to the point where they were committed to

memory. This level of proficiency contributed significantly to the efficiency and accuracy of financial operations under the legacy system. Shelby did not support the X.XX.XXXX structure. Mary offered suggestions, such as alphabetizing or designing a new structure, but I pushed to see if there was any way to incorporate the numbers I knew effortlessly. As we talked it through, we discovered she could set up the account structure so that each GL number had seven digits. Essentially this allowed me to keep my numbering structure, without the periods, which was key. I can still identify my accounts based on type, fund, and department. I do not think I would have been able to successfully transition to Shelby and all the methods used if I had to re-invent my GL codes.

In February, after two months of discussion, planning, and reconciliation in the CW accounting module, we finally had the FYE 12/31/23 ending balances, a new Chart of Accounts, and all funds tied to a Net Asset in Shelby. We were ready to implement the switch. Our target conversion date was February 15, 2024.

On February 6, my assistant resigned with effective notice at the end of the day due to a critical medical diagnosis for her husband. This brought everything to a grinding halt as I had to pick up the day-to-day tasks like payroll, accounts payable (AP) and producing financial statements. I had not done payroll in three years but processed the next biweekly payroll with few issues. On the next payroll that was due, the 3rd party payroll provider switched our account to a new platform, with no training. Our payroll is complex with some teachers having up to four pay rates and labor allocations. I ended up processing payroll over the phone with someone in Kentucky who I had never spoken with before. It took over 8 hours to input everything for one payroll.

The following week, I received notice that we were being audited by the Arizona Department of Economic Security (DES) for a grant we received in 2021 due to Covid Relief Funding. The Audit had to be completed in less than 30 days. Everything but payroll stopped at that point. The audit ended with 15 Exhibits and over 250 pieces of documentation. It was submitted on March 15, 2024. I finished payroll and then prepared an outline for the Shadow Rock Board of Directors of all the financial tasks on my plate broken down by week from February 5, through August 31, 2024. The payroll migration and DES Audit ended up adding eight weeks to the timeline and required reprioritizing migration tasks.

Data Migration and Go-Live

April of 2024 was a big step in the conversion process for both Amplify and Shelby. April 9 was the final data conversion for Amplify. The data was sent back on April 12, and I discovered that the conversion brought twenty-three years of data. That would take some time to clean up. The same week, I processed the first live transactions in Shelby, an AP run. First quarter 2024 giving statements were sent to all donors from both systems and I asked members to proof the statements and let me know if there were any discrepancies. All the donor records were spot on, the only issue I had was one statement where the first name was the child's name, not the parent. I considered that a major celebration!

After months of preparation and planning, I was finally going "live" in both Amplify and Shelby. I was nervous but super excited to be moving into the 21st Century. During the first check run, I had to figure out new processes. Recurring transactions are handled differently between the two platforms. Despite Mary warning me in the training period to *always (always always)* check the financial settings (month and bank account) before doing anything, I forgot. I got all the way to the end of my check run and I couldn't post or figure out where my data was. I

had to go online to find resources on how to fix the error and located a helpful troubleshooting guide from Shelby Systems. What stood out immediately was the bolded text on the first page:

"**Always, ALWAYS, ALWAYS** verify your **Current Financial Settings.**

1. Company

2. Fiscal Year

3. Period

4. Bank Account

5. Credit Card" (Shelby Systems, 2017).

Never having completed a conversion of this magnitude, I did not anticipate so many things that were automatic that I would have to relearn; it was like having to learn to breathe again. Who would have thought you would need to set up your checks to print with your printer in the new software? Or input all your AP vendor information: company name, address, phone, fax, and EIN? Where do you input payables? I knew how to move around in CW and make corrections when needed. However, they were workarounds for a poorly designed audit trail. For example, if I had to void a check in CW, I would have to create a Journal Entry (JE) to debit cash and credit the expense account to clear the transaction in the bank rec. Shelby has a feature where you select the check, mark it as void and it creates the reversing entries for you!

The next training sessions were to verify the accounting data. We had decided that March 31, 2024, would be the cutoff date for recording transactions in CW. I downloaded all the CW transactions for each month of the first quarter and Mary was able to map the data to import into Shelby.

Mary also provided me with import files for our electronic giving and payroll files. Suddenly, I was able to complete tasks that had previously taken hours in a much shorter time. Importing donations each month in CW took 8-10 hours and then another 1-2 hours to post the donations into the accounting module. Now the donations import file takes less than an hour to import to donor records in Amplify and then synchronize instantaneously with Shelby.

The new payroll platform that was not originally part of the technology upgrade was also a significant time saver. In CW it took about two hours per biweekly payroll to post the appropriate JEs and Transfers, now payroll takes less than 15 minutes to post in Shelby. These two processes improved overall efficiency, and by the middle of May the time savings were becoming evident.

We began validating the data. I completed the bank reconciliation for Q1 2024 in CW, and Mary created the corresponding bank reconciliations in Shelby. During this process, I discovered that some transactions completed at month-end, or a few days into the next month, had not exported into the original files. I reviewed all the first-quarter transactions line by line to identify what had not been transferred. In the end, there were about 30 transactions, but searching through the data was cumbersome. Once I had a list, I completed the missing transactions by hand in Shelby (remembering to put them in the appropriate period!) and we continued working together. As I became increasingly comfortable in the new accounting environment, I assumed responsibility for entering all transactions.

Refinements and Evaluation

We were now at the end of the second quarter, and it was time to prepare financial statements in Shelby. Once again, an unanticipated issue was finding and designing reports that

my church teams and board were used to seeing and understanding. Mary continued handling the bank reconciliations for me each month as I worked on producing understandable reporting for the board and congregation.

By the end of the third quarter, we had finalized the reports, and in September the focus of training shifted back to Amplify. I learned how to enter pledges for the new year, account for prepaid pledges and manage other pledge related tasks. I also began the cleanup of donor records that went back to 2001. Mary was able to show me how to create a group and apply the settings so I could identify any members who had not given in the prior five years. Once the group was established, it required another massive process to remove those donors a batch at a time.

I learned how to open the new year, move back and forth between years and Mary continued to reconcile bank statements. As previously noted, another important system configuration involved designing giving statements to include both pledges and the contributions made toward fulfilling those pledges. Once this task was done, I was able to email out most of our giving statements automatically, another improvement over CW. CW does have the ability to send electronically, but to do so I had to set up a separate email account exclusively for emailing contribution statements that would not be flagged as spam and send no more than 20 statements at a time. A process that had taken many hours was now done in minutes.

Final Steps March – June 2025

By Mid-February of 2025, we had closed FYE 2024 and set up the next training sessions in March for Mary to show me how to do the bank reconciliations, one of the last tasks I had not been trained on in Shelby. We decided that I would then try to reconcile all the bank accounts for the first time in the month of April. Bank reconciliation is another wonderful feature in Shelby.

Not only does it provide a reconciliation of transactions, but it also shows on the bank rec screen if your General Ledger is in or out of balance. I proceeded reconciling all the accounts and the process was very smooth and easy. In May, prior to our next training, I was reviewing all the bank recs and noticed there were outstanding transactions that had not cleared the bank dating all the way back to February of 2024. We needed to review those transactions to see what they encompassed.

We found that when I had posted the "missing" transactions from the first quarter of 2024 shortly after the initial import, Mary had already uncovered these transactions and posted them as part of the original bank recs. We also found that things like voided checks, which I was voiding as I had done in CW, were not posted accurately and needed to be reversed and voided in the system. This resulted in additional cleanup work, and I was concerned that it might necessitate reissuing financial statements dating back to February 2024. I asked if we could just make the adjustments in December and Mary informed me, we could we do it in December, but the preferred way would be to open an "audit" period so that all the transactions would be isolated from the rest of the year's transactions. This not only kept me from reissuing financials for the entire year, but it kept the revised transactions within this audit period, allowing us to run a report showing all the adjustments and then roll the ending 2024 balances forward into 2025.

Although the $1,500 discrepancy—representing just 0.3% of our total budget—had no material impact on the fiscal year-end 2024 figures, I believe in maintaining transparency and integrity. Therefore, it was important to address and resolve the issue. I informed Pastor Ken, the president, and the treasurer of the congregation about this issue and prepared the appropriate reports for the board review.

Results and Impact

Now that the transition and all the cleanup are complete, I am confident we have finally resolved the outstanding issues left from the database and financial conversion as of June 2025. In the initial project proposal, I had anticipated an end date of June of 2024. In retrospect, this date did not anticipate full integration and reconciliation. The new ChMS and accounting systems were running in the new environment, but I did not anticipate the length of time it would take.

This extended timeline is due to multiple factors, including changing the scope of the project from just the ChMS to totally abandoning our accounting software and upgrading to a much more robust system. It required a heavy lift to make these changes. Shadow Rock has a very small staff: the Senior Minister, the Director of Campus Affairs, and I, operating as the Director of Operations.

When we originally planned this transition, I had a part-time assistant working 20-25 hours a week who handled the day-to-day financial tasks. When she resigned suddenly, I could not take on the task of hiring someone and training them in the old system that we were abandoning, while I was still learning the new systems. I ended up incorporating all these changes while still doing my full-time work and my assistant's part-time work at the church. Most of these processes and implementation were done in the evenings and on weekends.

Although the project took much longer than expected, Shadow Rock ultimately implemented innovative technology that will allow us to continue evolving and improving our systems. The efficiency gains have exceeded expectations, with significant time savings and

fewer reporting errors. I look forward to continuing to learn and leverage new technologies within the platform.

Throughout each stage of planning and implementation, collaboration was essential. Key partners, including church leadership, board members, and vendor representatives, supported decision-making, accountability, and technical execution. Their specific roles and contributions are described in the *Team Involvement and Group Involvement* section.

Team/Group Involvement

This project may have been driven by my initiative and technical background, but it was made possible through collaboration, support, and partnership. The team around me—although small—brought wisdom, accountability, and encouragement in every phase of the technology transition at Shadow Rock Congregational Church.

Supervisor Involvement

My supervisor, Pastor Ken, was instrumental in both the origin and the success of this project. His leadership is rooted in trust and vision. He recognizes that faithful administration is part of the church's ministry, not separate from it. His encouragement for me to pursue certification through The Church Network came long before this project took shape. His advocacy opened the door for professional development that directly benefits Shadow Rock's operations and infrastructure.

Throughout the project, Pastor Ken's support was steady and empowering. He provided theological grounding when I questioned how technology fit into the broader call of ministry and stewardship. In our conversations, he reminded me that upgrading systems was not simply an administrative improvement; it was a spiritual act of care for the community. He offered feedback at key moments and trusted my expertise to make the best choices for the church's

long-term needs. That trust allowed me to move forward with confidence in evaluating, implementing, and aligning our new systems.

Team Members and Their Roles

Because of our lean staffing model, I had to draw on both internal and external resources to complete this project. Each person contributed in a unique way, and their involvement kept the project moving forward even when challenges arose.

Our Financial Assistant at the time was expected to play a significant role in accounting validation and data testing during the transition. Unfortunately, she was unable to participate when she faced an unexpected critical family medical crisis and had to resign. This left a large gap in the implementation plan, as no one else on staff had the experience or technical ability to manage the accounting integration or validation steps. I had to assume those responsibilities alone, which added to the workload but also deepened my understanding of how each part of the system connected. While this situation was not ideal, it reinforced the need for documented processes and cross-training for future continuity.

Mary Chavez, who served as our Ministry Brands trainer for both Amplify and Shelby, became an invaluable collaborator. She initially collaborated with us in a vendor capacity but quickly became an essential partner in this project. Her insight into both platforms helped shape our decision to adopt the new Shelby Accounting Module and integrate it with Amplify. Because our remaining staff lacked the proficiency to serve as an internal liaison, Mary effectively became our staff liaison for training and implementation. She provided hands-on support, helped troubleshoot complex issues, and ensured that we were not just transferring data but building

sustainable processes. Her patience and expertise turned what could have been an overwhelming task into a manageable and successful implementation.

Bob Lee, a longtime church member, mentor, and collaborator, served as a sounding board and partner throughout the project. His role was not formalized on paper, but his contribution was significant. His encouragement kept me grounded in the bigger picture—reminding me that each incremental improvement was part of a larger goal: aligning our administrative systems with our mission of inclusion, justice, and spirituality.

Board and Leadership Support

The Board of Directors played an important supporting role in this process. Their confidence in my leadership and their willingness to invest in technology upgrades made the project possible. They not only approved the necessary expenditures for new software and training but also encouraged me personally to pursue my CCA certification. Their endorsement of both the project and my professional development reflected the culture of trust and collaboration that defines Shadow Rock. It was also an example of stewardship in action—understanding that equipping staff and improving systems are long-term investments in the health and sustainability of the church.

Although the Board was not involved in the implementation details, they were engaged in progress updates, asked thoughtful questions, and supported the transition. Their support underscored that this was not "my project" but our project—a shared commitment to strengthening the administrative foundation of the ministries we serve.

Challenges of a Small Team

Working with such a small staff was both a blessing and a challenge. The most significant challenge was the sheer lack of available expertise. I was the only person on staff who had the background or ability to manage the transition between systems, understand accounting principles, or validate data integrity. Because of this, the project was as much about capacity building as it was about technology.

There were moments when the workload felt overwhelming, particularly during the data migration phase. Every record had to be checked, every connection between Amplify, Shelby, and Vanco verified. There was no one I could delegate to, and because the systems were so interconnected, hiring an assistant at that stage would have brought more risk than relief. I had to balance day-to-day operations with long-term project work, often after hours or on weekends.

Some lay leaders initially struggled to grasp the scope and pace of the systems transformation, which added frustration all around. We were able to name this reality, and it helped us get through it together. Educating them as fellow stake holders and sojourners was a large part of this project that sometimes added to my own frustration, as I thought I could be putting this time and energy directly into the project.

Despite these constraints, I experienced a deep sense of purpose. Each obstacle became an opportunity to practice perseverance, patience, and problem-solving. When things became particularly difficult, the words from our Shadow Rock Covenant came to mind: "that sensitive and responsive part of human society which perceives and responds to God's newest thrust in the midst of history." In that spirit, I treated the project as sacred work—trusting that even in the spreadsheets, code, and data cleanup, we were creating something enduring that would serve our

community for years to come.

Lessons in Collaboration and Faithful Administration

This project taught me that collaboration looks different in small organizations. Sometimes, it means inviting external partners into our process. Other times, it means carrying the load alone but surrounded by encouragement and prayer. Every person who participated—Pastor Ken, Mary, Bob, and our Board—brought gifts that shaped the project's success.

Through this process, I learned that leadership in ministry isn't about doing everything yourself; it's about creating the conditions for others to contribute meaningfully. The project reaffirmed my belief that technology, when grounded in mission and community, can be a form of ministry itself. What began as a systems overhaul became a story of perseverance, teamwork, and shared purpose. I was reminded that even the most administrative work in the church is spiritual when done with intention, collaboration, and care.

Overall Contribution of the Project to Other Church Administrators

This project demonstrates a replicable model for small and mid-sized churches transitioning from legacy systems to integrated cloud-based platforms. The step-by-step approach—needs assessment, vendor evaluation, phased rollout, and continuous training—provides a practical roadmap for others. It emphasizes the intersection of information management, financial stewardship, and ministry leadership. Other administrators can adapt this framework to increase efficiency and sustain mission alignment through innovation.

While the focus was on technology, information and financial management, the outcomes extended far beyond systems and software. The transition to integrated platforms has strengthened our administrative foundation, improved transparency, and created new

opportunities for collaboration among staff, ministry teams, and preschool. By replacing

outdated tools with modern, connected systems, we have reduced duplication of effort, increased

accuracy in data reporting and enhanced the church's ability to communicate and respond in real

time. The benefits are both tangible and intangible. The tangible benefits consist of providing

more reliable financial reporting and efficient donor management. The intangible benefits

include renewed trust in our administrative processes and greater alignment between our

operational practices and theological values.

In many ways, this project bridged the gap between faith and function. It demonstrated

that faithful stewardship includes caring for the infrastructure that supports ministry. It also

modeled how technology can be an expression of inclusion, justice, and spirituality—helping us

meet people where they are, expand access to information, and foster a sense of belonging.

The project's long-term contribution is capacity. It has created the structure and clarity that

allows staff and lay leaders to focus more on ministry and less on manual process. Future

projects, whether related to communications, finance, or community partnerships, can now build

upon this solid foundation. The lessons learned and systems implemented will continue to serve

Shadow Rock and its extended ministries for years to come. In keeping with The Church

Network's mission of professional church administration, I believe administrators will find this

project an extremely valuable resource for technology upgrades.

Suggestions for Further Implementation

There are intermediary steps and one last large implementation to fully leverage the new

systems and reduce staff burden. In the next three months I will resume training in Amplify to

learn and incorporate automatic workflows, such as new members receiving automated welcome

emails, or notifying the minister when a prayer request or phone call is requested. Amplify will

also allow staff to track members' participation and involvement, create workflows, and send notifications to each other. This touchpoint in the software will allow more personal engagement within our community. It is crucial to get this part of our system moving as quickly as possible. Pastor Ken announced in May of 2025 his intent to retire, and we have just entered a season of search for a new minister. We anticipate having a new senior minister called by January of 2026. Having these tools and workflows available to the new minister will be imperative for them to understand and learn about the congregation they are called to serve.

One of the major goals of the new software is to continue to educate the congregation and the board with clear and concise financial statements. In a congregational meeting two years ago when I was presenting the 2023 FYE financial statements—just before converting to Shelby— one of the congregation members said to me, "Well, I don't understand it, but I trust you." That comment really resonated with me that I need to make financial statements as easy to understand as possible.

The last major task of the database conversion will be switching our electronic giving from Vanco to Amplify. Electronic giving has been a great blessing to our household. Eighty percent of our donors give electronically, and most have been e-givers for over 15 years with Vanco. There will be a significant learning curve and a major educational component to make everyone aware of these changes and to launch the new product successfully. Currently, we are planning for implementation in the second quarter of 2026.

I would allow more time for phased implementation between software conversions if I were to do this project again. Working alone through multiple system transitions has shown me that even minor changes can have ripple effects across accounting, communication, and reporting. Spacing out each phase more deliberately would create room for testing and

documentation, reducing stress during high-volume ministry seasons. I also learned the importance of documenting each process as I go, so that future staff or volunteers can build on a clear foundation.

In the future, I plan to evaluate each implementation stage at six and twelve months after completion, focusing on system reliability, reporting accuracy, and user adoption. Annual reviews during the budget cycle will assess whether our tools are still meeting operational and ministry needs. Amplify continues to launch new features, and I intend to explore these opportunities thoughtfully and prayerfully as we evolve and respond to God's newest thrust in history. This ongoing commitment to refinement ensures that our administrative systems will continue supporting the mission, ministry, and values of Shadow Rock for years to come.

This project was initially developed under the 2015 Project Guidelines and has been updated to reflect the 2025 Certification Project Guidelines adopted by The Church Network.

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