Multi-Campus Strategies

Best Practice Series

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Introduction

This document describes the best-practice configuration and use of Fellowship One for churches and organizations with multiple campuses and/or sites.

Fellowship Technologies is committed in providing the tools and expertise necessary to ensure an efficient and functional configuration and implementation of Fellowship One. If your church is currently implementing Fellowship One, it is strongly recommended that you consult with your Delivery Manager to further discuss options available in your implementation process not covered in this document.

This document incorporates the span of experience of Fellowship Technologies Delivery Services and support staff in the configuration and use of Fellowship One, as it applies to past and current multi-campus clients. This Best Practices document is meant to be used as a recommendation on how to best configure Fellowship One in a multi-campus environment. A church may choose to adapt one or more of these recommendations to meet the needs of your situation.

Within this document, the term “client” is synonymous with “Church” and/or “Organization”, the term “campus” is synonymous with “location”, “site” or “remote site”.

Multiple Database Approach

There are two approaches to implement multi-campus management in Fellowship One. The first is to create a separate Fellowship One database for each campus. Each would have its own church code, user logins and data. This option is preferred when each campus operates fairly independently from all other campuses. In such cases, the control and security of a single campus’ data is of greater value than being able to produce unified “roll-up” reporting, single database input and data sharing across campuses.

When multiple databases are used, anyone with giving/contribution access will only be able to view contribution records that pertain to that campus. If someone should give at a second campus, their information will have to be re-entered into the second campus database. Under the single database approach, that would not be required.

If someone visits a second campus, their information would have to be re-entered to receive follow-up or response to inquiries. There would not be any way to know if a new visitor has attended other campuses or not.

Single Database Approach

Although Fellowship One does not natively support the concept of a campus within its feature set, there are several techniques that can be used to effectively support multiple campuses within a single Fellowship One database. These techniques vary for each feature and are described below to support the differing needs of centrally controlled versus campus controlled multi-campus churches.

The biggest advantage of this approach is that all campuses are allowed to share the same set of data while still creating campus specific views of information.

Portal Users

In a single database, all Fellowship One users from all campuses are defined together. Some permissions will allow the church to control which users can update or even access campus specific data. These include Ministry Read/Write and Note Types. However, others do not. People Edit and Contributions Read/Write are not campus specific. If a user has People Edit, they will be able to update any person's name, address, phone number, etc.; regardless of the primary campus the person may attend. If a user has Contributions Read/Write, they will be able to view any person's giving history and/or update any individual contribution; regardless of the primary campus the giver may attend.

Fellowship One Ministries

The first technique involves using the Fellowship One Ministries feature in a specific way to support multiple campuses. We recommend that each ministry that would normally be created in Fellowship One for a single campus be duplicated for every other campus. Each ministry active at a particular campus would have its own Fellowship One ministry.

To avoid naming confusion, the church should decide on a campus code naming convention; preferably of 2-3 characters in length. This "campus code" would be prepended to each ministry name to create a unique name such as "FTW – Children's Ministry". This combination would be used for all Fellowship One ministries defined to clearly define the campus and ministry involved. A sample ministry list for a 3 campus church might look like:

FTW – Children's Ministry
FTW – Student's Ministry
FTW – Weekend Services
FTW – Discipleship
ATL – Children's Ministry
ATL – Student's Ministry
ATL – Weekend Services
DAL – Children's Ministry
DAL – Weekend Services

Use of Security Permissions

Using this technique, specific ministries can be screened out of view by assigning read/write permissions to only those Fellowship One ministries relevant to each user. The Fellowship One administrator can assign those permissions in the securities tab. A user will not see a ministry in the Portal or in reporting if that person does not have at least Read permissions to that ministry.

These rights can be assigned to the campus level for local management of individual ministry areas and assigned "globally" for central administration at the leadership level. Using our 3 campus example above, let's assume each has a local Children's director. However, campus FTW has central leadership that oversees the entire children's program all at campuses. Each local director would be granted read/write permissions to their specific ministry to manage and administer his/her span of care. The director at campus FTW would also be granted permissions to the Fellowship One ministries at the DAL and ATL campuses as well, allowing them to manage his/her span of care across all children's programs at the church regardless of location.

Effects on Reporting

Many reports in Fellowship One allow the church to filter on specific ministries when displaying attendance, assignments, etc. The lists of ministries offered to a specific user is directly controlled by the permissions that user has been assigned. This further allows the church to screen unwanted Fellowship One ministries from the view of specific users.

Fellowship One Activities

The second feature involves configuring Fellowship One Activities with the same "Campus Code" naming scheme as in the Ministry configuration with a "Global" Activity Name (although some activities may be local only or specific to only one campus, in this case use the same naming convention as "Global" activities) and unique "Campus Code" to identify location. A sample activity list for a 3 campus church might look like:

Central leadership can generate reports based on all ministries across all campuses while local leaders can report on only their campus.

FTW – Worship Service (activity)
ATL – Worship Service (activity)
DAL – Worship Service (activity)

Effects on Reporting

This will allow activities to be reviewed in Reports, the "Today" home-page, and in Check-in.

Activity Types

We also recommended that the client determine an "activity type" with each activity to "bind" the activities together for reporting purposes. This is recommended for clients who require tracking of "mini churches" or groups smaller than the church as a whole. A Sample Activity Type list might look like:

Adult Bible Study
Adult Small Groups
Children's Worship
Youth Small Groups
Weekend Services

Within the above structure, leadership can report on Adult Bible Study I, II or III across the entire organization.

In circumstances where churches are structured in such a way where these break-out groups have a specific demographic (such as age, marital status, child status, etc) requirement, central leadership can track these groups at the group, campus and global levels.

Fellowship One Sub-Statuses

We recommend that the sub-status feature be used to denote which is the "primary campus" for the individual. Each major Fellowship One Status would contain multiple sub-status values; a campus code for each campus. There would not need to be sub-statuses for Deceased, Contributor Only, or Inactive people unless the church specifically needed those for some reason. A sample Status/Sub-Status list for a 3 campus church might look like:

Member (status)
  FTW (sub-status)
  ATL (sub-status)
  DAL (sub-status)
Attendee (status)
  FTW (sub-status)
  ATL (sub-status)
  DAL (sub-status)

The recommendation is that each campus have an assigned campus code sub-status for a minimum of "Member" and "Attendee" but it is a recommended best practice to assign a campus code sub-status to every status upon which reporting at a detailed level (by campus) is required.

Effects on Reporting

Sub-status is a field that is viewable in search-results and reports and is a relatively rapid return of data vs. other methods of configuration.

Fellowship One Contact Forms/Items

The next feature involves configuration of Fellowship One Contact Forms and items. There are two general contact configuration scenarios and their variations that are recommended in Fellowship One for multi-site environment, Central Follow up or Distributed Follow up.

Central Model

In Central follow up, each contact item is routed to one central person for follow up, regardless of the campus origination of the contact. With the Central Follow up Model, a particular Contact Form is created once and is routed to a central portal user and the origin of the contact is determined by the Sub Status of the Person initiating the contact or the ministry associated with the contact item. A Sample Contact for a 3 campus church may look like:

Communication Card (contact form)
  I Accepted Christ (contact item) **…***Routed to Central staff member*
  Please Call Me (contact item) **…***Routed to Central staff member*

Distributed Model

In Distributed Follow up, each contact item is routed to a local campus portal user for follow up.

With the Distributed Follow up Model, specific Contact Type(s) must be created for Each Communication Card for each specific campus and contact items must be created for each campus utilizing the same naming scheme as in the Fellowship One Ministry and Fellowship One Activity configuration (e.g. Campus Code – Contact Item). Since each contact item can only be routed to a single Portal User, each item is created and then routed to a portal user at the local level.

FTW – Communication Card (contact form)
FTW – I Accepted Christ (contact item) **…***Routed to FTW staff member*
FTW – Please Call Me (contact item) **…***Routed to FTW staff member*

ATL – Communication Card (contact form)
ATL – I Accepted Christ (contact item) **…***Routed to ATL staff member*
ATL – Please Call Me (contact item) **…***Routed to ATL staff member*

DAL – Communication Card (contact form)
DAL – I Accepted Christ (contact item) **…***Routed to DAL staff member*
DAL – Please Call Me (contact item) **…***Routed to DAL staff member*

Use of Security Permissions

Each individual Portal User must be given the appropriate rights to read the designated contact items before they can be assigned to said User.

Fellowship One Attributes

The Attribute Groups and Individual Attributes features can be defined for a variety of church specific uses. They may also be configured for campus specific purposes. Once defined, these attributes can be assigned to campus specific Contact Forms. An example of this would be if each campus had their own newsletter, the person initiating a contact could select one or more "Campus Code - Newsletter" attributes which would need to be assigned to specific contact forms. A sample Attribute for a 3 campus church might look like:

Newsletters (attribute group)
FTW – Newsletter (individual attribute)
ATL – Newsletter (individual attribute)
DAL – Newsletter (individual attribute)

Fellowship One Funds/Sub-Funds

The last technique involves using the Fellowship One Funds and Sub Funds features to store contributions by purpose, the spending destination of the money, and by the campus from which the money was collected. There are a couple of ways funds/sub-funds can be structured to achieve this goal. The one chosen is dependent on the preferred priority of contributions search and reporting to work. The methods are:

Purpose First Model

The purpose first model allows for searching and reporting contributions by a specific purpose first across all campuses and then secondly by campus. A sample following this model might look like:

General Fund (parent fund)
FTW – General Fund (sub-fund)

ATL – General Fund (sub-fund)
DAL – General Fund (sub-fund)

Building Fund (parent fund)
FTW – Building Fund (sub-fund)
ATL – Building Fund (sub-fund)
DAL – Building Fund (sub-fund)

Missions Fund (parent fund)
FTW – Missions Fund (sub-fund)
ATL – Missions Fund (sub-fund)
DAL – Missions Fund (sub-fund)

Campus First Model

When the preferred method of searching and reporting is first by campus and then secondly by purpose, the campus first model should be used. A sample following this model might look like:

ATL Campus (parent fund)
ATL - General Fund (sub-fund)
ATL - Building Fund (sub-fund)
ATL - Missions Fund (sub-fund)

DAL Campus (parent fund)
DAL - General Fund (sub-fund)
DAL - Building Fund (sub-fund)
DAL - Missions Fund (sub-fund)

FTW Campus (parent fund)
FTW - General Fund (sub-fund)
FTW - Building Fund (sub-fund)
FTW - Missions Fund (sub-fund)

Effects on Contributions Search & Reporting

The model chosen dictates what the parent Funds will be and therefore defines the kind of searches that are possible using contribution search in the Giving area of the Portal. Contributions search can only access one parent Fund at a time which makes it is easy to perform a search for all contributions in a campus or purpose depending on the model selected.

You can search on a single Sub Fund within a parent Fund but not on multiple Sub Funds across one or more parent Funds. If a church has chosen to store contributions using one model but later wants to see results aligned according to the other, the ability to filter by multiple Funds and multiple Sub Funds will be required. A report is the only tool available to accomplish this.

Be advised that not all contributions reports allow multiple fund/sub fund selections in their filters. This may create some difficulty in getting results not aligned with the model your church has chosen to store contributions.

Use of Security Permissions

Contributions security rights can only be assigned globally within Fellowship One. This means that every Fellowship One user assigned Contribution Read/Write permission has access to all contributions records and cannot be limited by Campus fund or sub-fund. This is a limitation of the Single Database Approach.

Pledge Drives

In the event a campus creates a pledge drive specific its campus, we recommend that pledge drive name follow the "Campus Code – Pledge Drive" naming convention as a best practice. If people at all campuses will be making pledges to a single church pledge drive, this is not necessary or desirable.