

So Many Changes – How Do
You Overcome the Changes
in Your Ministry/Church?



 **AcctTwo**

Faith-Based Finance Collaborative

AcctTwo is focused on delivering the future of finance and accounting to our customers.

Our dedicated team of over 100 people has helped more than 800 organizations optimize finance and accounting through software implementations, accounting outsourcing, and consulting.

AcctTwo has been recognized by Sage Intacct as its Partner of the Year from 2014 – 2018 and by our customers as a leader in overall satisfaction and popularity through their reviews on G2.

Learn more at www.accttwo.com



CLOUD-BASED ACCOUNTING SOFTWARE
Grow your organization with the Cloud ERP that's #1 in customer satisfaction.



MANAGED ACCOUNTING SERVICES
By outsourcing your accounting, you gain the freedom to focus on your mission.



SOFTWARE DEVELOPMENT
Go the last mile of your financial journey with Sage Intacct+ to create a customized application to fit your organization.

CPE CREDIT FOR THIS COURSE

There are three things needed in order for you to receive CPE credit for the course you are attending:

1. Sign the sign-in sheet for each course.
2. At the end of each course, you will receive a reminder to complete your course survey, and it will have a link to all surveys. Please only fill out the one for the course you just attended. You can also do this after the event if you don't have time in between sessions. And PLEASE don't forget to include your name, so we will know who to give credit to.
3. There will also be printable certificates available for you to download at the end of the conference. Please be sure to attend our last session to find out more!

Without these items we are not properly able to credit you for this course.

SESSION OBJECTIVES

At the end of this session you will be able to:

- Identify challenges facing churches/ministries with the finance team
- Identify solutions that have been successful for addressing challenges
- Compare options as it relates to church/ministry challenges

MEET OUR PANEL



JEFF BARBER

**Executive Director
Park Cities Presbyterian Church**

Jeff is the current Executive Director of Park Cities and is helping to lead a multi-year capital campaign, along with implementing many systems changes at the Church.



SHEILA BUCKLER

**Executive Director of Support Ministries
Bent Tree Fellowship**

Sheila has been on staff at Bent Tree since 1995. She oversees the following ministries: HR, Facilities, Database, IT, Accounting, and Communications. She has led all major construction projects for the church over the past 20 years. She is a member of the Senior Leadership team.

Prior to joining the staff of Bent Tree Sheila was involved in banking. Her role at the church began with volunteering to help with phone on Fridays.

Sheila is married, a mom to two adult children and their spouses, has two grandkids, and one fur baby.



BRIAN COLEMAN

Chief Operating Officer Covenant Church

Brian Coleman serves as the Chief Operating Officer at Covenant Church since 2001. Brian provides oversight across 4 campuses for several ministry departments including Information Technology, Operations, and Security and other back-office processes. Brian also served on the Board of Directors for American Heritage Academy and other non-profit businesses in the Dallas community as well.

Brian attended the University of Texas at Austin where he graduated Magna Cum Laude in 1986 with a BBA in Management Information Systems. Brian's business career began as a management information systems consultant with Arthur Andersen & Co., and over the next 15 years, Brian held various management positions with Fortune 500 companies including Sprint and PageNet. He was most recently the Director of Enterprise Applications at Interstate Batteries in Dallas before joining the ministry in 2001.

Brian and his wife, Deanna, have been married for 31 years and have 3 sons.



TAMMY BUNTING

Chief Financial Officer
Concord Church

I have over twenty-five years of experience in accounting, business administration, operations, and management. This includes work in both the secular and non-profit Christian environments. I've been responsible for providing the controllership functions of all business environments at a multi-ministry church enterprise.

I've been a partner in a thriving Intacct value-added reseller business, and have been the Director of Not-for-Profit Services at AcctTwo, a Financial Management Software and Business Process Outsourcing company. I am currently the CFO at Concord Church. I was raised and educated in the Christian church, and have a unique perspective into the world of non-profit and faith-based business administration and accounting.

WHAT ARE THE CHALLENGES?

WHAT ARE THE SOLUTIONS?

CHALLENGE – PARK CITIES

- We didn't have the technology to tackle the activities of the church
- Started a 3 Year Capital Campaign
- Needed Infrastructure setup to be scalable for growth
- Changing Vision strategy



SOLUTION – PARK CITIES

- Work with AcctTwo and implement Sage Intacct and other best-in-class vendors
- Provides training and customization to adapt and respond to our reporting, scalability, redundancy problem
- Outsourced a chunk of our accounting functions to AcctTwo to streamline processes and gain efficiency
- Lessons Learned/Results:
- It has provided tremendous cost-savings
- Discovered mid-stream in the change management period over 18 months that we needed help with coaching, consulting, and managing of all the changes



CHALLENGE – BENT TREE

- In March 2019, our Senior Pastor stepped down
- Changed from Sr Pastor led to Collaborative Senior Leadership
- Had to address our Vision and wanted to stay true to our ministry activities
- Multi–site church model precipitated the need for cloud-based accounting



SOLUTION – BENT TREE

- Church Leadership responded and divvied up responsibilities
- Has worked well by being collaborative
- Lessons Learned:
- Transition to Sage Intacct was mentally tough
- Pushed my thinking for reporting and communicating with our team and senior leadership
- Give yourself grace to make all the changes needed



CHALLENGE - COVENANT

- Difficulty finding skilled professionals in IT and Accounting within their membership
- Challenge of staying up to date with training/skills
- Desire to invest our time in front line ministry
- Amount of time consumed with focusing on administrative aspects of Church – had to prioritize



SOLUTION - COVENANT

- Outsourcing IT and Accounting functions
- Freed up resources and bandwidth to focus on ministry and community
- Has been cost effective and an upgrade in systems and working with well-qualified people in their respective
- Lessons Learned/Issues overcome:
- Needed emotional buy-in because concerned for the people – tremendous care for the people, even if they weren't the best fit
- Had to look at the long-term in making the decision to be better stewards and how to better impact the community by making the change
- Upside was AcctTwo was able to hire some of the staff and still work with them today; able to maintain historical info and cultural knowledge of the church



CHALLENGE - CONCORD

- We work for visionaries – both mega and not-so mega
- We are constantly trying to keep up as we keep moving on to the next thing
- Difficulty prioritizing and continuing to create solutions



SOLUTION - CONCORD

- On the Sage Intacct Platform and with Outsourcing Accounting functions to someone who understands churches, we have a real partnership that brings the caliber of systems and experience to really help us – its not what you expect
- Like being outsourced so they don't have to sit in meetings that don't matter to them – can focus their time and talent to how we want to use them
- Free up resources and bandwidth to focus on ministry and community – support in real partnership
- A real upgrade in systems and working with well-qualified people in their respective fields

