



5 Technology Advances for Governance Excellence

by Vonna Laue and Michael Martin

TECHNOLOGY DRIVES MUCH OF WHAT WE DO TODAY. IT IMPACTS SO MANY ASPECTS OF CHURCH ADMINISTRATION. YOU KNOW THAT BECAUSE YOU ARE AWARE OF WHAT HAPPENS IN THE OFFICE IF THE SERVER GOES DOWN OR SOMETHING HAPPENS TO THE INTERNET CONNECTION... ABSOLUTELY NOTHING!

A friend of Vonna's was at the World's Fair in New York in 1964 where there was a mainframe computer display. The promotion exclaimed that computers would make life so much easier for people in the future that we would only work three or four days a week. Wow, how different the future turned out! Now we can work 24 hours a day, seven days a week.

While we understand the opportunities that technology presents related to human resources, accounting, and scheduling, we may overlook what it can provide in the area of excellent governance. *Technology advances improve our ability to communicate. That is where technology and governance intersect.*

CONSIDER THE FOLLOWING STRATEGIES SOME CHURCHES AND MINISTRIES UTILIZE TO REAP THE BENEFITS OF TECHNOLOGICAL ADVANCES:

1

DIGITIZING MINUTES AND OTHER INFORMATION

Let us start with the basics. Each church should have electronic copies of board minutes and supporting information. Compensation study information, conflict of interest questionnaires, budgets, and auditors' reports are just some examples of the supporting information that should be maintained. You may choose to have a hard copy as well, and the information definitely needs to be included on a tested backup storage device. However, electronic copies will make searching for needed information easier and will significantly cut down on the amount of physical storage needed.

Electronic documents should also be considered to replace the board book and committee reports.

Your church may have one or two holdouts that will require or request a hard copy for the meeting, but many of the other attendees would rather look at their computer screen during the board meeting anyway. This makes the information easier for them to review when they have time, rather than requiring they have the physical documents with them. It also provides better protection of your information than having multiple copies floating around in committee members' cars or offices. It will also encourage your team to prepare the information far enough in advance that it can be sent and reviewed prior to the meeting rather than presented upon arrival which allows for very little or no preparation time.

2

DASHBOARDS

Governance decisions are only as good as the information utilized to make the decision. This is where dashboard reporting can be extremely helpful. It can focus the attention on the "main" things. If church leadership has identified key financial and non-financial metrics they want to track, a dashboard report can keep those pieces of information in one report. In the past, this was more of a manual process.

Now, there are many options from Excel to free tools like Google Data Studio or even vendors that specialize specifically in this type of reporting. The reports can be printed, emailed, or even accessed remotely utilizing live data. The graphics will help engage everyone so you are no longer just relying on the numbers-oriented members to understand the information.

3

ELECTRONIC MEETINGS

Time is precious for everyone, and it can be difficult to recruit effective and engaged board members. Conducting electronic meetings with the entire governing board in a church setting may not be beneficial. However, we have seen technology leveraged well with finance and other committees.

Programs such as Zoom or GoToMeeting allow participants to log in from nearly anywhere. This may mean the difference between getting that highly

qualified and very busy potential committee person or having them decline because of time and travel constraints. If they can be home and only take time away for the actual meeting rather than commuting, or if they can participate even when their job requires out-of-town travel, they may say "yes" to the request to serve. Conference calls and video conferences are now easily conducted and can be as simple as audio only or include sharing of screen information with live drawing capabilities.

4

**BOARD
EDUCATION
AND
TRAINING**

Many board members may have a wealth of strengths and experiences but have never served on the board of a nonprofit, much less a church. There are general fiduciary responsibilities to carry out, but there are also additional factors that make church board participation unique.

It is important to provide ongoing board education and training. This training doesn't need to be an all-day offsite retreat, and may actually be more effective by including bite-sized opportunities at several meetings during the year. You may choose to use an

online board assessment that helps identify where there may be weaknesses in board meeting agendas, board competencies, or communication. There are also resources available electronically such as videos, podcasts, and eBooks.

ECFA offers a number of these resources, including a digital resource called the Governance Toolbox that includes four training options that facilitate brief board training in areas such as board recruiting, conflicts of interest, and succession planning.

5

**BOARD
PORTAL**

Board portals are another great way to leverage technology for more excellent and efficient governance, especially in larger churches. These portals offer a centralized location to gather and maintain information for board members to access electronically.

Similar to electronic board books and committee reports, portals eliminate paper and minimize the

risk of confidential church documents floating around where they don't belong. All board-related documents can be maintained in one place. Whether that is organizational documents (e.g., Constitution and Bylaws), board policies (e.g., conflicts of interest and board affirmation statement), minutes, agendas or member contact information, it is all easily and quickly accessible through a board portal.

HOW MIGHT YOUR BOARD BETTER LEVERAGE TECHNOLOGY?

Take the opportunity today to consider how you might be able to employ technology to improve the governance of your church. You may even want to ask board or committee members what you could do electronically that would help them in their roles. Many volunteers work day-to-day with technology that could easily be deployed to bring our administration and governance practices up-to-date without

requiring significant financial resources.

Speaking of leveraging technology, check out ECFA's growing online resource community at www.ChurchEXCEL.org – with hundreds of FREE tools and training to help churches EXCEL in their governance and administration practices.



Authors

Vonna Laue, CPA, and Michael Martin, JD, CPA, are privileged to serve on the leadership team of ECFA (Evangelical Council for Financial Accountability), an organization that certifies churches and ministries for financial integrity based on high standards in governance, financial management, and gift administration. To learn more about ECFA certification and resources, visit ECFA.church.

