



FOUNDRY UNITED METHODIST CHURCH MINISTRY TEAM MANUAL



Grace and peace!

As your pastors and staff, we are so grateful that you offer your time, talents, gifts, service, and witness as leaders and members of Foundry's ministry teams. The work you do makes our congregation a place where people can "love God, love each other, and change the world." As you continue this important work, we are committed to being resources for you in your ministry. Please do not hesitate to let us know how we can best serve you and assist you in your work.

In this document you will find information about important upcoming events, tools, and tips for communicating the work of your ministry teams. We also offer strategies to strengthen your existing programming and opportunities to continue honing your gifts and abilities as individuals and ministry teams. We welcome your feedback and ideas about improving our resources and providing more opportunities for you to witness and serve the world. You bless us through your ministry and partnership in the work of Foundry. Many blessings on you, and wisdom and strength in all our work to come.

Much Peace,
Your Foundry Clergy and Staff

Table of Contents

[Organization and Definitions / 4-7](#)

[Staff Contact Information / 8](#)

[Ministry Team Contact Information / 9](#)

[Ministry Teams and Equipping Staff / 10-11](#)

[Growing and Developing Your Ministry Team / 12-15](#)

[Financial Procedures / 16-17](#)

Reimbursement

Budgeting

[Congregational Communications / 18-19](#)

Ministry Area Announcements

Foundry Digital Newsletters

Foundry Forge Newsletter

Sunday Morning Announcement Guidelines

[Using Planning Center Online and the Church](#)

[Center App / 20-41](#)

The Basics: Organization & Definitions

There are seven principal ways we work together to accomplish Foundry's vision to love God, love each other, and change the world.

1

The Foundry Board: Is comprised of nine members, nominated by the Nominations Committee and affirmed by congregational vote at Church Conference. The Board works with the Senior Pastor to set the vision of Foundry United Methodist Church, empowering and supporting staff and ministry teams to:

- Articulate goals and vision for fulfilling Foundry's statement of call.
- Approve the appointment of the Senior Pastor pursuant to the Book of Discipline.
- Support and evaluate the Senior Pastor and support the work of the ordained clergy and staff.
- Ensure effective planning to accomplish and implement congregational goals.
- Monitor programs and services and identify opportunities to improve or strengthen congregational goals.
- Ensure adequate financial resources, protect assets, and provide proper financial oversight including approval of the Annual Budget. Ensure implementation of effective financial controls.
- Ensure legal and ethical integrity of Foundry United Methodist Church, including compliance with the Book of Discipline's requirements with respect to Council duties.
- Actively pursue learning opportunities related to large church structure and development.
- Build and maintain a competent Board by recruitment and orientation of new members, and annual self-evaluation of board performance through a report to the congregation.
- Appoint Foundry's lay delegation to the Baltimore-Washington Annual Conference.

2

Committees of the Board:

The purpose of Board Committees is to assist the Foundry Board in achieving the church's vision. They are created and staffed as needed at the direction of the Board. These standing committees provide necessary support for the short-term and long-term operational health of Foundry. They include: Personnel, Audit, Finance, Mission Possible, Governance, Facilities, and Nominations.

3

Ministry Teams:

Ministry teams promote the church's vision and strategy through work within our ministry areas, or departments. These include: Administration, Communications, Discipleship, Family Ministries, Hospitality and Congregational Care, Music, Social Justice, and Worship. Ministry Teams usually require a Ministry Team Description and work to set strategy, goals, and processes that empower our congregation to love God, love each other, and change the world. Any Foundry member, church attendee, or community supporter can join a Foundry ministry team. All teams are supported by an assigned Equipping Staff Person (generally a Ministry Director or clergy person).

4

Servant Leadership Teams:

Servant leadership teams promote the church's vision on a tactical or functional level across departments. Examples include: ushers and greeters, prayer teams, and hospitality on Sundays. Ministry Teams may (but not always) coordinate the functions of Servant Leadership Teams.

5

Small Groups:

Small Groups promote Foundry's vision through organized, ongoing, spiritually-based gatherings organized around the principles of prayer, theological reflection, fellowship, and service. Clergy/Staff do not lead these groups. Each small group is instead led by a lay-person, and engages different levels of Christian education and support. Examples include but are not limited to: Bible study, prayer, and practical theology. Small groups are often neighborhood-based, and form near areas where Foundry community members and/or constituents live.

6

Fellowship Groups:

These routine groups promote the church's vision by providing support to familiar phases of human life experience. Topic examples include retirement planning, parenthood, or stress management through yoga. Fellowship Groups are not led by clergy or staff; they are lay-led events emphasizing fellowship and community-building with a topical focus.

7

Classes:

Classes promote the church's vision through various learning opportunities. Classes can vary from short-term to longer-term, and cater to different ages. Subjects embody a range of faith issues, and life-faith interrelated study. They are organized by clergy and/or staff, in conjunction with Ministry Teams.



Committees of the Board

- Personnel
- Finance
- Audit
- Governance
- Facilities and Operations
- Nominations

Departments



SOCIAL JUSTICE

Ministry Teams

- Sacred Resistance Ministry Team
- Journey to Racial Justice Ministry Team
- LGBTQA+ Advocacy Team

Servant Leadership Teams

- Books to Prison
- Cooking Ministries
- English as a Second Language (ESL)
- Sandwich 1000
- Great Day of Service
- Washington Interfaith Network (WIN)
- ID Ministry
- Project Transformation



FAMILY

Ministry Teams

- Kids Ministry Team
- Youth Ministry Team
- Scholarship Ministries Team
- Parents Ministry Team

Servant Leadership Teams

- Library
- Childcare Ministry



MUSIC

Servant Leadership Teams

- Jubalate
- Chancel Choir
- Foundry Instrumental Music Team



WORSHIP

Servant Leadership Teams

- Altar Guild
- Creative Worship Team
- Communion Stewards
- Scripture Readers



ADMINISTRATION

Ministry Teams

- Stewardship Ministry Team
- Archives and History Ministry Team

Servant Leadership Teams

- JobCorp



DISCIPLESHIP

Ministry Teams

- Discipleship Ministries Team
- Leadership Development Ministries Team

Servant Leadership Teams

- Small Group Leaders
- Fellowship Group Leaders
- Servant Leadership Taskforce
- Women's Retreat PlanningTeam
- LGBTQ+ Retreat
- Planning Team



HOSPITALITY AND CARE

Ministry Teams

- Care Ministry Team

Servant Leadership Teams

- Sunday Morning Prayer Team
- Ushers
- Greeters

Staff Contact Information

Foundry United Methodist Church

1500 16th Street Northwest
Washington, D.C. 20036

Office: 202-332-4010

Office Email:

Foundry@foundryumc.org
foundryumc.org

Hours of Operation:

Monday: Closed

Tuesday: 9 a.m. – 9 p.m.

Wednesday: 9 a.m. – 10 p.m.

Thursday: 9 a.m. – 9 p.m.

Friday: 9 a.m. – 2 p.m.

Saturday: Closed

Sunday: 8 a.m. – 2 p.m.

*May be subject to change.

Ginger Gaines-Cirelli
Senior Pastor
ginger@foundryumc.org
Sabbath: Mondays

Will Ed Green
Associate Pastor &
Director of Discipleship
will@foundryumc.org
Sabbath: Fridays

Kelly Grimes
Associate Pastor and Director of
Hospitality and Congregational
Care
kelly@foundryumc.org
Sabbath: Mondays

Ben Roberts
Associate Pastor &
Director of Social Justice
Ministries
ben@foundryumc.org
Sabbath: Mondays

K.C. Van Atta-Casebier
Associate Pastor &
Director of Family Ministries
kc@foundryumc.org
Sabbath: Fridays

Lani Willbanks
Associate Pastor and Executive
Director of Operations and
Impact
kealani@foundryumc.org
Sabbath: Fridays

Phil Carney
Hospitality Assistant
phil@foundryumc.org

Alice Chang
Wedding Coordinator
alice@foundryumc.org

Lee Kathenes,
Jajuan Dye,
Tyler Tarrant
Sound Technicians

Eric Lee
Audio Visual Manager

Grant Mizell
Project Coordinator
grant@foundryumc.org

Erin Ridge
Music Department Intern

Kaylon Rutledge
Director of Digital
Engagement
kaylon@foundryumc.org
Sabbath: Fridays

Stanley Thurston
Director of Music Ministries
stanley@foundryumc.org
Sabbath: Mondays

Jasper Travis
Senior Operations Manager
jasper@foundryumc.org
Sabbath: Thursdays

Rosa Vega
Hospitality Host

Bryan Villarroel
Project Coordinator
bryan@foundryumc.org

Jackie Wright
Program Ministry
Support Manager
jackie@foundryumc.org

Archives	archives@foundryumc.org
Care Ministries	careministryteam@foundryumc.org
Choir	music@foundryumc.org
Kids Ministry Team	kids@foundryumc.org
9 a.m. Communion Stewards	communion@foundryumc.org
11:15 a.m. Communion Stewards	communion@foundryumc.org
Discipleship Ministries	discipleship@foundryumc.org
Family Ministries	kc@foundryumc.org
Foundry Women's Retreat	womensretreat@foundryumc.org
Jubilate Choir	gospelchoir@foundryumc.org
Chancel Choir	chancelchoir@foundryumc.org
Music Ministries Team	music@foundryumc.org
Grant Writing Team	grantwriting@foundryumc.org
ID Ministry	idministry@foundryumc.org
LGBTQ+ Advocacy	lgbtqadvocacy@foundryumc.org
LGBTQ+ Retreat	lgbtqretreat@foundryumc.org
Planned Giving Ministry Team	plannedgiving@foundryumc.org
Racial Justice Ministry Team	racialjustice@foundryumc.org
Scholarship Ministry Team	scholarships@foundryumc.org
Scripture Readers	scripture@foundryumc.org
Stewardship Ministry Team	stewardship@foundryumc.org
Sunday Morning Prayer Team	sundaymorningprayer@foundryumc.org
Parents Ministry Team	parents@foundryumc.org
Youth Ministry and Missions Team	youth@foundryumc.org

Foundry United Methodist Church Team Contact Information

Ministry and Servant Leadership Teams by Department

The Foundry Board—Ginger Gaines-Cirelli (ginger@foundryumc.org)

Audit Committee	(Lani Willbanks, equipping staff person)
Executive Committee	(Ginger Gaines-Cirelli, equipping staff person)
Facilities and Operations Committee	(Lani Willbanks, equipping staff person)
Finance Committee	(Lani Willbanks, equipping staff person)
Governance Committee	(Ginger Gaines-Cirelli, equipping staff person)
Nominations Committee	(Ginger Gaines-Cirelli, equipping staff person)
Personnel Committee	(Ginger Gaines-Cirelli, equipping staff person)

Administration—Lani Willbanks (kealani@foundryumc.org)

Archives and History
Administration
Stewardship Ministry Team

Family Ministries—K.C. Van Atta- Casebier (kc@foundryumc.org)

Kids Ministry Team
Library
Childcare Ministry
Scholarship Ministry Team
Youth Ministry Team
Parents Ministry Team

Social Justice—Ben Roberts
(ben@foundryumc.org)

Books to Prisons

Cooking Ministries

Christ House
Saturday Cooking Mission
Sandwich 1000

English as a Second Language (ESL)

Great Day of Service

ID Ministry

LGBTQA+ Advocacy

Journey to Racial Justice

Sacred Resistance

Ending Chronic Homelessness
Washington Interfaith Network
Green Ministry Team
Immigration Advocacy
Washington Interfaith Network (WIN)

Project Transformation

Discipleship Ministries—Will Green
(will@foundryumc.org)

Worship Ministries

Altar Guild
Communion Stewards
Creative Worship Team
Scripture Readers

Discipleship Ministries

Adult Fellowship Groups
Adult Sunday School Teachers
Discipleship Ministries Team
Fellowship Group Ministries
Leadership Development
Ministries Team
Small Group Ministries

Retreat Ministries

LGBTQA+ Retreat
One-day Retreat Ministries
Women's Retreat

William Astor Kirk Symposium Series

**Hospitality and Care
Ministries—Kelly Grimes**
(kelly@foundryumc.org)

Care Ministry

Card Ministry Team
Nursing Home/Hospital Visitation
Sunday Morning Prayer Team

Hospitality Ministries

Greeters
Ushers

Support Groups

Welcome Table

Music—Stanley Thurston
(stanley@foundryumc.org)

Chancel Choir

Foundry Instrumental Ministry Team

Jubilate Choir

• Unless otherwise noted, the program director listed serves as the equipping staff person for each team.

Growing & Developing Your Ministry Team

An important role of Christian leaders is calling new people into ministry and service. Some people come prepared to dive right into the work of the ministry team. Others benefit from help in getting ready to serve. The following strategies can help develop your team so that it is prepared to accomplish its work.

1

Be clear about the team's purpose and strategy.

Before inviting someone to participate on your ministry team, be clear about what they are being invited to do. Develop a Ministry Team description that succinctly lays out your ministry team's goals and connects the team's role to Foundry's mission and vision. Thinking through your purpose will also help you and others know your team's work and importance.

2

Have clear roles for each team member

People are busy. They need to know exactly what they're being asked to do before they commit their time and energy to your ministry team. Though ministry leaders might have in mind a clear role for someone to fill, team members may not be certain what is expected. It is helpful to write and share job descriptions, which we call Servant Leader Job Descriptions, for specific roles on the team such as recorder (secretary) or facilitator. You should spell out time commitments, necessary training, needed spiritual gifts, skills or abilities, and other information relevant to work on the team.

3

Develop an intentional plan to inviting people to join your team. Once you have developed your team's purpose, strategy and goals, consider when and how you will reach out to invite new people to participate.

a. Ask your equipping staff person to connect you with individuals who have the gifts, skills, and abilities the team needs. Communicate needs as they arise with your staff person so that the staff person can share that information with other staff to identify the appropriate persons to ask.

b. Be clear about roles, responsibilities, and relationships on the team. Decide the methods of decision-making in and between team meetings. Decide how you'll arrive at decisions and who is responsible for what. Create and keep an updated team covenant that outlines how you will work together, communicate with one another, and define your relationships with one another.

c. Identify specific times of year to invite new people. This designation of time enables you to be strategic in your outreach, including when to run bulletin announcements and set up tables in the Community Commons. Scheduling outreach also prevents 'reactive recruitment,' or inviting people because there is an urgent need for persons to assist with specific tasks.

d. Be prepared to provide new people with the information outlined above. As new members of an existing team, it is especially important for them to understand your team, its purpose, and their role.

e. Understand that people may sample your ministry team and decide it's not for them. Sometimes a team just isn't the right fit. That doesn't mean the person doesn't believe your team is important. Allow folks the chance to give it a try; if it is not the right fit, thank them and help them find a different place to serve.

f. Solicit feedback from new team members. Fresh eyes often help provide insights about a team's work such as new places to grow the ministry, increase communications, and improve the team culture. Follow up with new members to make sure they feel welcomed and supported, and that they have information needed to engage meaningfully.

g. Most important, be flexible! As new members' gifts emerge, be sure to utilize those gifts. Invite people to serve in places where they may best contribute and engage.

4

Develop a plan for training new members

New people need to understand what the team is, how it operates, and how its work fits within the larger work of Foundry Church. Develop and use a plan to help new members feel connected and ready to engage with the team. Strategies for this orientation include:

- a. Assigning a team member as a mentor or friend to stay in touch regularly with a new member.
- b. Setting aside a meeting annually or bi-annually to review purpose, strategy, and team operation. This review works best when inviting new members at specific times during the year.
- c. When a new member attends for the first time, reserve time for team members to introduce themselves, their role they play, and the reasons they are a part of the ministry team.
- d. Following up individually with new members within their first month or two of joining the team to make sure they feel connected and able to engage.

5

Create a culture of fellowship and care

Given the amount of work our ministry teams undertake, it's easy to be all business. People don't join teams just to do work. Other mutually supportive practices are important. Creating space for people to build relationships is important for the success of your team. Gathering prayer requests and praying as a team, setting aside time for fellowship, whether over a meal or outside of your team work, and making sure to follow up with absent members are all practices vital to building a strong team. Celebrate folks who leave the team, and thank individual members who complete particular tasks so that they know they are honored and appreciated by the team and the congregation.

6

Develop clear, measurable goals that align with team purpose and steps to achieve them

Once the team has written a statement of purpose and has a strategy for accomplishing it, set annual goals to measure the effectiveness of the team's efforts. Designate a meeting once a year to review your team's statement of purpose, identify evidence that the team has or has not accomplished that purpose, and set new measurable goals to focus the team's efforts on its priorities in the coming year. The team can provide feedback about the previous year's work, what is working well, and where the team needs to grow and go in the coming year.

7

Identify needs for training or ongoing learning (and a plan to meet them).

Does the team need to know how to execute events at Foundry? Are there specific tasks the team performs that require special knowledge? Do you need general knowledge on how to follow an agenda and accomplish your goals? Knowing what your team needs helps you develop a plan and find resources to empower team members.

Once you determine a need for training, inform your equipping staff person about what the church can do to help in that area.

So what's next?

If you need help developing a ministry team description, Servant Leader Job Description or team covenant, or if you would like someone to facilitate a team retreat for goal-setting or program-year planning, email your equipping staff person. A team member will be in touch to schedule a time to offer a team training or facilitate goal-setting. God has called you to unique and life-changing ministry, and together as the Body of Christ we have everything we need to do that. So dream big. Plan well. And celebrate what God is doing with you and with your team.

Financial Procedures

Reimbursement

Individuals spending money on behalf of Foundry United Methodist Church and expecting reimbursement should:

1. Contact the staff person related to the ministry area to approve any requests for expenditures.
2. Coordinate all purchases so that the staff person can make direct purchases by Foundry United Methodist Church to take full advantage of tax exemptions.
3. Provide original receipts to the staff person for all purchases expected to be reimbursed.
4. Make a request for reimbursement in writing with original receipts for reimbursement within 60 days of purchase.
5. Do not attempt to gain a tax exemption for any purchase that is not paid for by either a Foundry United Methodist Church check or a Foundry United Methodist Church credit card. This prohibition includes cash purchases. Attempting an exemption with payment other than by Foundry United Methodist Church check or credit card will put Foundry Church's tax exemption status in peril.

Budgeting

Ministry Teams should provide the Equipping Staff Person associated with their ministry information about any budget needs. The budgeting cycle begins in the summer of each year for the following fiscal year (January to December) as follows:

- Staff gather budgeting information by August.
- The Finance Committee of The Foundry Board assembles a draft budget together in September.
- A budget workshop (open to the Finance Committee, Management Board and all Ministry Teams) is held in late September or early October.
- Budget for the coming year is approved in the December Management Board meeting.

Congregational Communication

Ministry Area Announcements

- The Communications team, led by Kaylon Rutledge, will help you share your information with the Foundry community. As information about your event or initiative becomes available, please send it to Kaylon at kaylon@foundryumc.org. Our communications team will feed it into the appropriate communications channels.
- Information should be shared with Communications no less than two weeks prior to the date you wish to begin marketing the event or initiative.

Foundry Digital Newsletters

- **All Things Foundry** | Sent weekly on Sunday evenings to publicize Foundry news, updates, and upcoming events.
- **Connections** | Sent bi-weekly on Tuesdays to share information on classes, small groups, and other discipleship opportunities
- **Kids Newsletter** | The Foundry Family Ministries Newsletter is sent monthly to highlight Foundry Family Ministries' news, updates, and events.

Foundry Forge Newsletter

The Foundry Forge is distributed each month by email to the congregation. Print versions are available upon request at the Welcome Desk. The purpose of the Forge is to provide inspiration and information for the month ahead through the following:

A reflection from Pastor Ginger; a lay-written article sharing a member's account of their experience in some ministry, mission, or another service area of Foundry; dates of wide interest in the month to come; and "Did You Know?," highlighting a fact about Foundry that may not be generally known.

Ideas for lay-written articles are welcome, and can be emailed to Forge Editor Elder Wellborn at forge@foundryumc.org.

Notes:

1. Articles are no longer than 300-350 words, and should be emailed to the editor by the tenth day of the month before the month of publication. (e.g., October 10 for the November issue).
2. The editor is also happy to receive suggestions for "Did you know?" entries and information on upcoming events. Please include a sentence or two with essential details.
3. As a matter of practice, the editor is usually in touch with the appropriate staff member during the editing process.

Sunday Morning Announcement Guidelines

Verbal worship announcements are determined by clergy and staff during our weekly worship planning meeting. As an act of hospitality to those in worship, we attempt to keep these announcements brief, and **only make announcements which impact the congregation as a whole or extend hospitality to first-time worshippers and guests.**

Using Planning Center Online and the Church Center App

The Church Center App

Download and Set Up Instructions

Go to your Google Play or App Store and search for "Church Center."

Download the app.

Open the app and select "Get Started."

Follow the prompts to locate Foundry. If you would prefer to NOT let the app use your location, you can select "Search by Postal Code" immediately below the "Use My Location" button and search using zip code 20036.

On the next screen, select this is my church.

The system will now prompt you to enter your cell phone number to send you a one-time message with a code used to confirm your identity. Please note: You must use your cell phone number to receive the code.

If you already have a profile set up in our database, you're all done! If you do not, you will be prompted to enter your name and email address. Please note: If your cell phone number is not associated or correct in your current database profile, you will have to create a profile. If you'd like to make sure your cell phone number is up-to-date, please email lwillbanks@foundryumc.org.

You're all done! Use the helpful tips here to update your information, review your giving, make new gifts, register for events, and more!

Updating Your Information

Click the profile button in the top, right-hand corner of your screen.

Click the box that contains your name. From here, use each box to update your information. Use the small, grey stars next to your address, phone number, and email address to indicate your preferred contact information (if you have more than one number, address, or email address). When done, select Update at the top-right hand of the screen.

Registering for Upcoming Events

Select the "Events" icon at the bottom, right hand corner of the screen.

Scroll through all events or use the "Categories" box at the top of your screen to filter based upon event type.

Select the event for which you wish to register or that you want to know more about.

When ready, select "Register" at the bottom, completing the prompts as requested. You will have the opportunity to register yourself, other people, and to update your contact information as you go, as well as to purchase add-ons like books or pay for the event using saved payment information.

Please note: Registrations are only open UNTIL the date the event starts. If you need to sign up for a class or on-going event AFTER the event start date, please sign up for the corresponding group using the instructions below.

Managing Your Registrations

To change, cancel, or delete a registration, first Click the profile button in the top, right-hand corner of your screen. Select "My Registrations"

Items with red text reading "Needs Attention" indicate missing payment or questions. You can click these events to add your answers, provide payment, or delete your registration.

To delete your registration select the event you wish to delete your registration for. Follow the prompts to delete your registration.

Note: Once you've deleted a registration, you MUST re-register if you change your mind. If you need a refund,

please contact the staff person responsible to the event for which you have registered.

-Select "Give" at the bottom of your screen.

Enter the amount of the gift you'd like to make.

On the next screen, select the fund you wish to make a gift to (General Fund, Mission Possible II, etc.), One Time (now), and the payment method you wish to use (see instructions on adding payment methods below)

If you wish, follow the prompt to cover the transaction fee associated with your gift.

Select Next. A screen will pop up asking you to confirm your gift.

To return to the app, select "Back to Church Center."

You may now view your Estimates of Giving and track your progress in fulfilling that Estimate using the Church Center app or by logging into foundryumc.churchcenter.com/home.

Making a Recurring Financial Contribution

Select "Give" at the bottom of your screen.

Enter the amount of the gift you'd like to make.

On the next screen, select the fund you wish to make a gift to (General Fund, Mission Possible II, etc.)

Under "Frequency," select the number of times per week/month you want the gift to occur.

If you wish, follow the prompt to cover the transaction fee associated with your gift.

Select Next. A screen will pop up asking you to confirm your gift.

To return to the app, select "Back to Church Center."

Reviewing your Financial Contributions

- Click the profile button in the top, right-hand corner of your screen.
- Select "My Giving" from the menu
- From this screen you'll be able to see all financial contributions received by the finance office, as well as any recurring gifts that you have set up. You are also able to edit recurring financial gifts—including pausing gifts, deleting a recurring gift, or editing amounts and withdrawal dates—by selecting the gift you wish to edit and following the prompts on the screen.

Adding a Payment Method* (Credit/Debit Card or Bank Account)

- NOTE: There are two ways to add a payment method to your account: (1) When making a financial contribution or (2) Via your Profile Page. Once added, a payment method will be saved to your account for your future use. You can delete or edit it at any time by following the prompts below.
- Click the profile button in the top, right-hand corner of your screen.
- On the next screen, select "Add" and the form of payment you wish to add. If you need to edit an existing payment method, you can do so using this screen.

*ACH transactions can take 5–7 business days to post to your account.

» TO ADD A DEBIT OR CREDIT CARD:

- Select "Add debit/credit card"
- Enter your card number, expiration date, and CCV number.
- You're done!

» TO ADD A Bank Account

- Select "Add bank account"
- Select which method you wish to use to verify your information:
 - * (1) Instant Verification: For this method you will need to use your online log-in credentials to log into your financial institution. Neither Foundry nor the app will retain or record your log in credentials.
 - * (2) Manual Verification: Adding an account manually will take 2–3 business days. You will need to enter your bank's routing number, the account number you wish to use, and what kind of account you are adding (Savings, Checking, etc.).
- Once you've added this information, you will receive an email from "noreply@churchcenter.com" (please check your Spam/Junk folders) to begin the verification process. The email will provide further instructions on verifying your account.

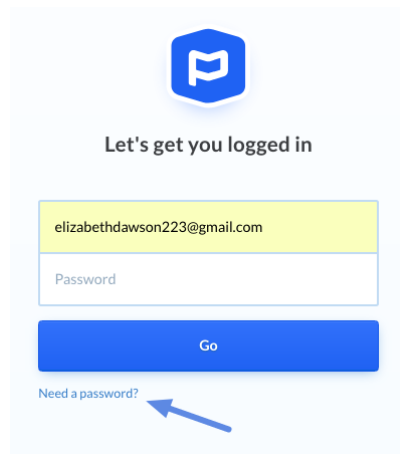
Using PCO Groups

Getting Started In Groups

Planning Center Groups is an online application that will help you manage your members, plan events, take attendance, and share resources. If you have been made a leader of a group, this article will go over the main functions of the app and help you get started with your group!

Log in to Groups

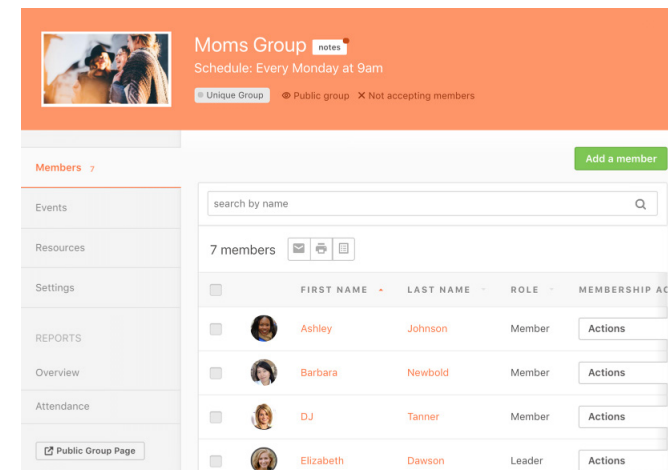
- The first time you log in to Groups, you may or may not need to set a password, depending on if you have previously set a password for one of our other apps.
- On the login page, select the Need a password? link below the email and password fields.
- You need to be a Group Leader or Administrator to log in to Groups.



- Enter the email address your administrator used to set up your profile, then a verification code will be sent to that email address. After entering the code, you will be able to create a password and then log in.
- Once you are logged in, you will stay logged in until you log out or after 2 weeks of inactivity.

Getting Started In Groups

- The first page you see when you select your group is list of all your members. There are some quick actions you can take on this page, such as emailing members, removing them from your group, or printing a list of members.
- You will also have the option to add new members from this page if your administrator has given you the permission to do so.

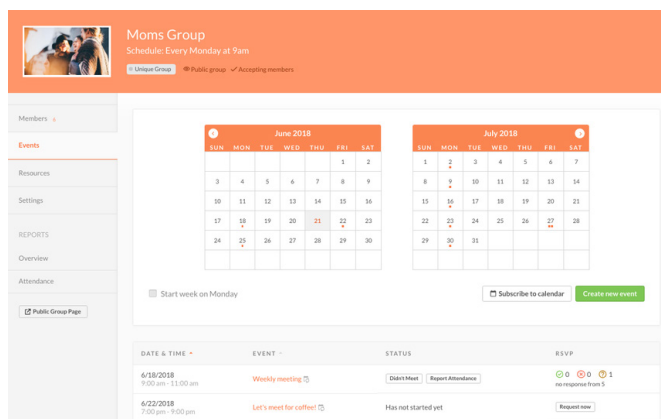


	FIRST NAME	LAST NAME	ROLE	MEMBERSHIP ACTIONS
<input type="checkbox"/>	Ashley	Johnson	Member	Actions
<input type="checkbox"/>	Barbara	Newbold	Member	Actions
<input type="checkbox"/>	DJ	Tanner	Member	Actions
<input type="checkbox"/>	Elizabeth	Dawson	Leader	Actions

- When someone requests to join your group, you will receive an email notification. You can either respond via the link in that email or respond from Groups. All requests will be displayed on top of your list of members.
- For more specific details on managing group members, see the [Add & Remove Members](#) article.

Events

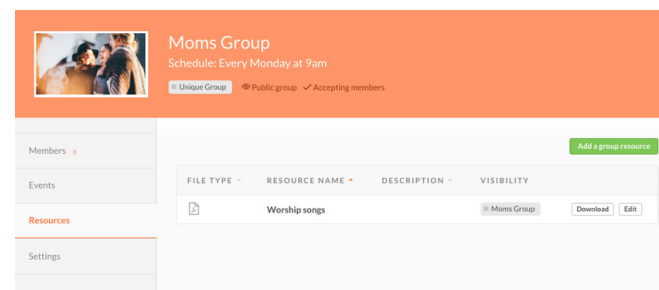
- The Events tab shows you a calendar of upcoming events for your group, along with some quick actions you can take on each event.
- From the event list, you can quickly report attendance or cancel past events. You can request RSVPs from your members for upcoming events and quickly view the responses.



- Once you select an event, you will see more details about that event, along with the option to edit the event.
- For more information on scheduling events, see the [Create, Edit, or Delete an Event](#) article.

Resources

- The Resources tab allows you to view resources that have been uploaded and shared with your group. As the leader, you will also have the option to upload resources for your members.
- When your members view the group, they will have access to the list of resources you have uploaded and they can download the resources on their end.
- Some mobile iOS devices have limitations on types of files that can be downloaded.



- For more information on resources, see the [Add Resources for Members](#) article.

Settings

- From the Settings tab, group leaders can modify group information such as name, description, and group image.

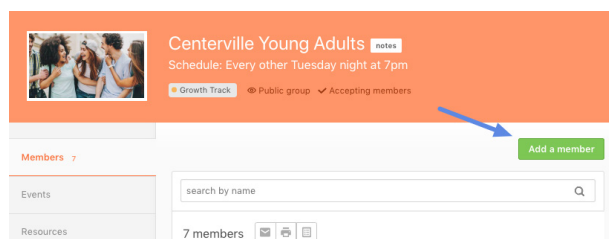
- Leaders can also update the meeting location, contact information, and group description.

Reports

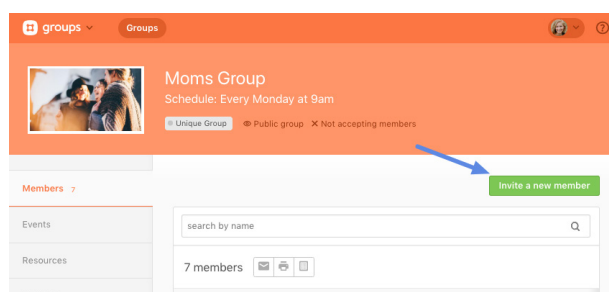
- There are currently two different types of reports. The Overview report will give you a bird's eye view of how your group is doing as a whole.
- The Attendance report will give you a closer look at the individuals in your group. As you take attendance during your events, this report will begin to populate.

First Name	Last Name	%	MAR 07	MAR 12	MAR 14	MAR 21	MAR 28	APR 04	APR 11	APR 18	APR 25	MAY 02	MAY 09
Felicia	Jones	22%											
Andrew	Maynard	44%											
Hannah	Field	56%											
Ryan	Thompson	56%											
Isaac	Martinez	78%											
Jada	Williams	78%											
Barbara	Newbold	89%											
Laura	Smith	89%											
Tim	Banks	89%											
Emily	Ellis	100%											
Attendance totals			6	2	2	8	8	8	8	8	8	8	8

- For more information on reports, see the [Reports](#) article.
- If you need any help as you're leading your group, use the ? in the upper right of any page to contact our Support Team.
- 1. Adding and Removing Members:
- Click Add a member, search for the person's name, and select their name when it appears.
- If they don't yet exist in the database, select Create a new member to add them to your database.



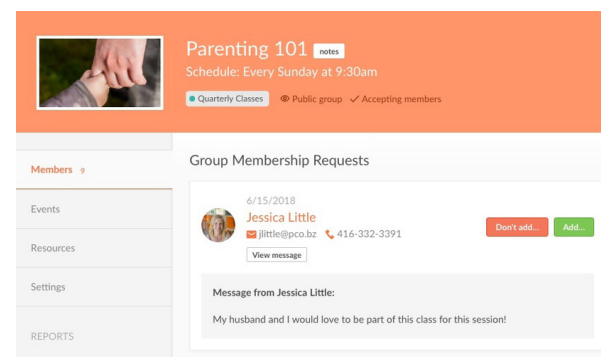
- If you are a Group Leader, and you see the Invite a new member button, this means that you do not have permission to search the Groups database. You can click the Invite a new member button to email the person and invite them to join the group.



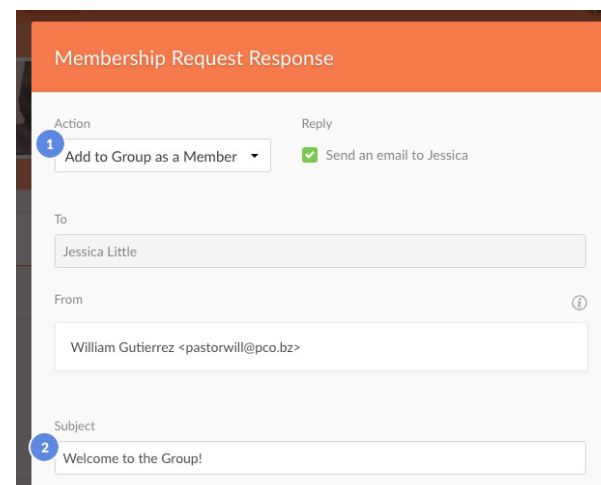
- After the person accepts the request to join the group, they will be added to the group as a member.

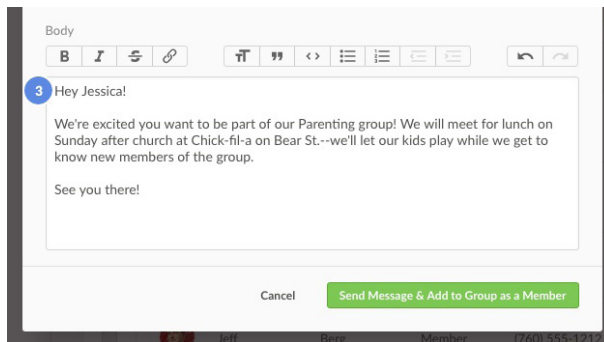
Accept or Reject Membership Requests

- Membership requests will be visible on the administrative side of each Groups page and on the notifications page.
- To approve or deny a member request to join, click either the Don't add or Add button next to the person's name.

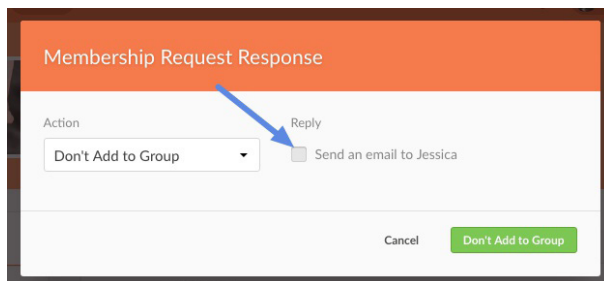


- To see the message from the person who wants to join, select View Message, and the message will expand below the request.
- Whether you add or remove a person, you can choose to send them an email.





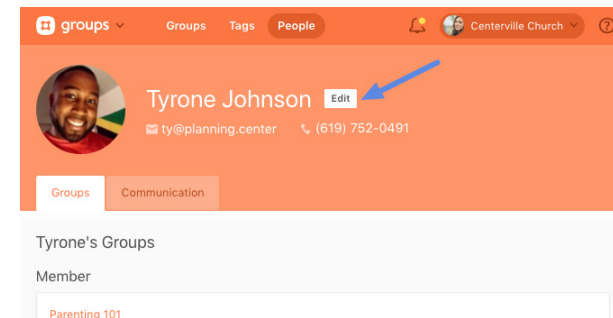
1. Make sure that the correct action is showing in the dropdown.
 2. Enter a subject, so the person will know why you're emailing.
 3. Welcome the person to the group or explain why they cannot join at this time. Use this email to give them any initial necessary information.
- Select Send Message to send the email to the person.
 - If, for any reason, you don't want the person to receive an email, uncheck the Reply box, and then click the button to add the person or reject the request.



Edit a Member's Information

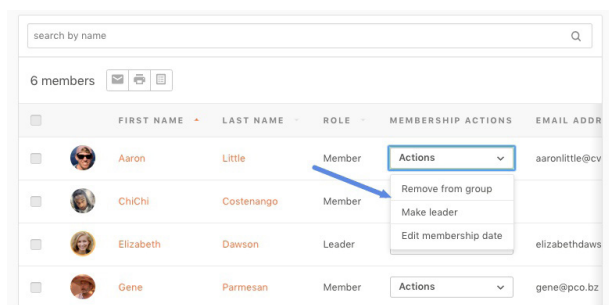
Administrators can update information for members or members can update their own information. Group Leaders cannot update member information. You can access a member profile in several different ways:

- Click the person's name in a Group Members list.
- Click the person's name in the Members tab on the Groups page.
- Search for the person from the Members tab on the People page.
- When you have the person's profile, click Edit.

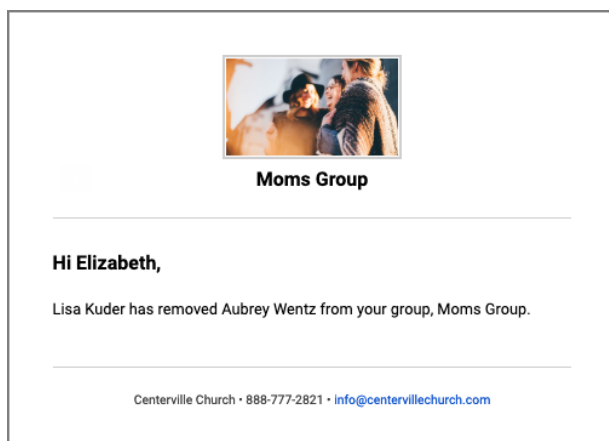


- Make any necessary edits, and then click Save.

An Administrator or Leader can remove a member from a group on the Members tab. Choose the dropdown under Member Actions on the same line as the person then select Remove from group.



- All Group Leaders, other than the leader who removed the person, will receive an email letting them know that the member has been removed.



- When a person is removed, their information is still available in the database through People. To fully remove the person from the database, make them inactive.

Accept or Reject Membership Requests

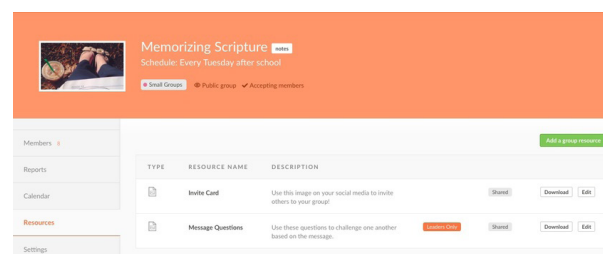
Resources are files that are available for others to access.

You can add resources to an entire group type, which will be available to all groups in that type, or you can add a resource to a group. You can also make resources accessible to only leaders or both leader and members.

The types of files that you can add to a group include:

- PDFs
- Microsoft Word documents
- Text files
- Small image files
- Small videos (50Mb or less)
- Resources are listed in alphabetical order based on their name.
- Add a Single-Group Resource

From a group page, go the Resources tab and select Add a group resource.



Any Shared resources will already be listed in the Resources tab with the Shared label attached.

The 'New Resource' form has an orange header. Below it are two tabs: 'File Upload' and 'URL Link'. The 'URL Link' tab is selected. The form contains the following fields:

1. Link: <https://www.desiringgod.org/articles/five-tips-for-bible-memory>
2. Name: Bible Memory Tips
3. Description: Here are some great tips for memorizing scripture!
4. Visibility: Members (selected from a dropdown menu)

At the bottom right are 'Cancel' and 'Save' buttons.

1. Choose the File Upload or URL Link tab.
2. Browse your computer for a file or enter a URL that you want to link to.
3. This field will be displayed on Resources pages. The actual file name or URL will not be visible.
4. Enter what the resource is for or when to use it.
5. Allow only Leaders or all Members to access the Resource.

Select Save to upload the file or add the link to your Resources page. All resources will be listed with labels showing who can access them.

The Resources tab shows a list of resources. A blue arrow points to the 'Bible Memory Tips' resource. The table has columns: TYPE, RESOURCE NAME, DESCRIPTION, LAST UPDATED, and VISIBILITY.

TYPE	RESOURCE NAME	DESCRIPTION	LAST UPDATED	VISIBILITY
🔗	Bible Memory Tips	Here are some great tips for memorizing scripture!	2/15/2019	Memorizing Scripture Go to Link Edit
📄	Bible Plan	One method to memorize is to Read It, Write It, and Pray It in order to internalize it. This is a great reference to help do that!	10/17/2017	Memorizing Scripture Download Edit
📄	Invite Card	Use this image on your social media to invite others to your group!	1/10/2018	Shared Quarterly Classes Bible Studies Small Groups Download Edit

An Administrator can edit or delete any resources; however, group leaders can only edit or delete resources they have personally added.

Select Edit then choose Delete at the bottom of the resource information.

Add a Shared Resource

From the Groups page, go to the Resources tab.

The Resources tab for Small Groups shows a list of resources. The table has columns: TYPE, RESOURCE NAME, DESCRIPTION, LAST UPDATED, and VISIBILITY.

TYPE	RESOURCE NAME	DESCRIPTION	LAST UPDATED	VISIBILITY
📄	Bible Study Questions	Here are some questions that you can use to encourage discussion in your study group.	5/8/2019	Leaders only Shared Small Groups Download Edit

1. Choose the group type of the resource you'd like to add.

2. Select Add new shared resource to add a file for all groups in the selected group type.

With Shared Resources highlighted, select Add new shared resource.

The screenshot shows the 'New Resource' form with the following numbered steps:

1. File Upload or URL Link tab selected.
2. Link field containing <https://www.desiringgod.org/articles/five-tips-for-bible-memory>.
3. Name field containing 'Bible Memory Tips'.
4. Description field containing 'Here are some great tips for memorizing scripture!'.
5. Shared with section showing checkboxes for ALL Groups (any type), Small Groups, Quarterly Classes, and Bible Studies, all of which are checked.
6. Visibility dropdown menu set to 'Members'.

Buttons for 'Cancel' and 'Save' are at the bottom right.

1. Choose the File Upload or URL Link tab.
2. Browse your computer for a file or enter a URL that you want to link to.

3. This field will be displayed on Resources pages. The actual file name or URL will not be visible.
4. Enter what the resource is for or when to use it.
5. Select the Group Types able to access the Resource.
6. Allow only Leaders or all Members to access the Resource. Select Create to upload the resource.

All shared resources for the group type will be listed with labels showing who can access them.

The screenshot shows the 'Resources' page with a table of shared resources. A blue arrow points to the 'Bible Memory Tips' resource.

TYPE	RESOURCE NAME	DESCRIPTION	LAST UPDATED	VISIBILITY
GO	Bible Memory Tips	Here are some great tips for memorizing scripture!	2/19/2019	Shared Quarterly Classes Bible Studies Go to Link Edit
PDF	Leader Expectations		1/10/2018	Leaders only Shared Quarterly Classes Download Edit

See at-a-glance what the resource is and which group types can access it then Download or Edit the resource as needed.

An Administrator can edit or delete any resources; however, group leaders can only edit or delete resources they have personally added.

Select Edit then choose Delete at the bottom of the resource information.

Taking Group Attendance

Attendance can be a key indicator of group health. When group leaders take regular attendance at group events, Administrators will know if the group has grown too large or become too small.

After you've created an event, you can take attendance.

Record Member Attendance

A group's Events tab shows the attendance status for each event. Events are listed in chronological order and show the date, name, and attendance, if it's already been taken.

- Select Report Attendance to be taken directly to the attendance roster.
- Group leaders receive an attendance email approximately 10 minutes before the start of an event. You can also click the link in this email to get to the Attendance Report.

DATE & TIME	EVENT	STATUS	RSVP
7/2/2019 7:00 pm - 8:00 pm	CYA Life Group	Report Attendance	Not Requested
7/16/2019 7:00 pm - 8:00 pm	CYA Life Group	Report Attendance	Not Requested
7/30/2019 7:00 pm - 8:00 pm	CYA Life Group	Has not started yet	Request now

- You can also select the event and Click Record Attendance in the event page to access the attendance roster.
- In the Attendance Report, put a check next to members who were present, and search for others who attended and want to be added as a member.

Events > Class meeting > Attendance Report

MAY 12 Class meeting
Location: Carlsbad Campus
10:00am [Edit date/time](#) [Cancel event](#)

	FIRST NAME	LAST NAME	ROLE
<input checked="" type="checkbox"/>	Adam	Endeeve	member
<input checked="" type="checkbox"/>	Phil	Johnson	member
<input type="checkbox"/>	Justin	Kent	member
<input checked="" type="checkbox"/>	Aaron	Little	member
<input checked="" type="checkbox"/>	Amy	Stevens	member
<input checked="" type="checkbox"/>	Aaron	Stewart	member
<input checked="" type="checkbox"/>	Steve	Urkel	member
<input checked="" type="checkbox"/>	Laura	Winslow	member

New Member:

name, email, or phone number

If you are a leader and you are not seeing the New Member or New Visitor search bar to add a new member or visitor, reach out to your administrator. This is a feature that can be turned on/off by your admin.

Record Visitor Attendance

Previous visitors to the group show at the bottom of the roster. Record any visitors that attended the event.

	FIRST NAME	LAST NAME	ROLE
1 <input checked="" type="checkbox"/>	Kimmie	Gibbler	visitor 2 <input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	Jamie	Siebens	visitor <input type="checkbox"/> <input type="checkbox"/>

4 New Visitor:

4

New Visitor:

name, email, or phone number

8 7 Members
1 Visitor

Submit Attendance Report

1. Check the box next to any visitors that attended the event.
2. Promote the visitor to a member.
3. Remove the visitor from the attendance report.
4. Search for a new visitor.

A visitor will be listed in the Visitor list until you use the buttons to promote or remove them, which can only be done on the attendance roster for the most recent event.

Select Submit Attendance Report to record the attendance.

Once attendance is added to the event, check out the reports to track any changes.

Modify Attendance Reports

To modify attendance for an event, go to the event page, and click Modify in the Attendance section.

Events > Bible Study

18 Monday 10:00am – 12:00pm

Event Reminders

Event has already happened

This quarter we are studying the book of Galatians.

Carlsbad Campus
6123 Yarrow Dr, Carlsbad, CA 92011

Show Map

RSVP

ATTENDANCE

Submitted By: Elizabeth Dawson

Modify

5 Members

Katie Chen

Make any needed adjustments in the Attendance Report, and then click Submit Attendance Report to submit the change. If your group didn't meet, click Actually, We Didn't Meet at the bottom of the screen, and then submit the report.

	FIRST NAME	LAST NAME	ROLE
<input checked="" type="checkbox"/>	Aubrey	Wentz	visitor

New Visitor:

name, email, or phone number

6 5 Members
1 Visitor

Submit Attendance Report

Actually, We Didn't Meet

Creating, Editing, or Deleting an Event

People in groups like to get together, which requires knowing when and where to go! The calendar helps you keep all of that organized, so your members will be able to attend all the events you create.

Create an Event

From a group Events tab, click Create a new event.

Moms Group

Schedule: Every Monday at 9am

Unique Group Public group Accepting members

Members

Events

Resources

Settings

REPORTS

Overview

Attendance

Public Group Page

November 2018

December 2018

Create new event

If you are an Admin, you can also create the event from the Groups main page. If you do this, you will need to fill in details about the event before you go to the New Event page.

1. Choose a location from the dropdown and use Edit location to add a specific address, or, if you don't know the address, drop a pin at your location.
 2. View a preview of the map that members or non-members will see on the groups page (depending on the Group Settings).
 3. Enter the description for the event shown on the groups page.
 4. Set automated reminders for the event.
- Select Create event when you're finished, and your event will be added to the calendar!

Edit the Event

Select the event name from the list to make any changes.

View more details like a map of the location or select Edit event to make changes.

From this event page, you can send event reminder emails. Edit any information then scroll to the bottom and Save.

A visitor will be listed in the Visitor list until you use the buttons to promote or remove them, which can only be done on the attendance roster for the most recent event.

The screenshot shows the 'Events' management interface. On the left is a sidebar with links: Members, Events (active), Resources, Settings, REPORTS, Overview, and Attendance. Below these is a 'Public Group Page' button. The main content area is titled 'Events - Let's meet for coffee!'. It contains two sections: 'Event Details' and 'Event Reminders'. The 'Event Details' section includes fields for Event Name (filled with 'Let's meet for coffee!'), Date (11/16/2018), Start time (7:00 pm), End time (9:00 pm), a checkbox for 'This is a multi-day event', a Repeat dropdown (set to 'Never'), a Location dropdown (set to 'Carlsbad Campus'), and a description field containing the text 'Let's meet for coffee and fellowship! Please note that there will not be childcare available for this event.' The 'Event Reminders' section has a toggle for 'Send reminder emails' (turned on) and a dropdown for '3 days before'. At the bottom right, there are three buttons: 'Delete', 'Cancel Event', and 'Save'. A blue arrow points to the 'Save' button.

If your event repeats, choose to save only this event or all future events as well.

Cancel or Delete the Event

If you have an event that is no longer taking place, there are two ways to update your calendar:

Delete an Event: This is permanent and removes all traces of the event from the calendar. If attendance was taken and Visitors were listed, that information will be permanently erased as well.

Cancel an Event: Unless your event was created by mistake, this is usually the best option for events that aren't taking place. When you use this option, the event remains on the calendar (both online and in subscriptions) but is labeled as "Canceled" so that members are aware. Here's how these top options work:

On the group calendar, select the event.

The screenshot shows a group calendar interface. At the top, there are two calendar views for February 2018 and March 2018. Below these is a table with columns for DATE, EVENT, and ATTENDANCE. A blue arrow points to the 'Small Group' event on 2/14/2018. The table lists several events, all with the status 'Has not started yet'.

DATE	EVENT	ATTENDANCE
2/7/2018	Small Group	Has not started yet
2/14/2018	Galentines Dinner	Has not started yet
2/14/2018	Small Group	Has not started yet
2/21/2018	Small Group	Has not started yet
2/28/2018	Small Group	Has not started yet
3/7/2018	Small Group	Has not started yet
3/12/2018	Dream Center Trip	Has not started yet



Cancel

Scroll to the bottom of the event and choose **Cancel Event**.

Description

B *I* u o

T **¶** **< >** **≡** **≡** **≡** **≡**

Come hang with some college students who are in #thestruggle. Midterms, crazy profs, and trying to afford rent are just some of the light topics we discuss.

[Delete](#) [Cancel Event](#) [Save](#)

You'll be given the option to notify group members the event has been canceled. Check the box and type in the reason to send to group members.

Cancel Event

☒

Notify group members?

It's Valentine's Day, so no small group! Celebrate with someone you love--even if it's us. ;)

Don't Cancel Event

Cancel Event

Choose Cancel Event to finalize the change.

The event will remain on the group calendar; however, it will now have a line through it, and the attendance column shows Canceled.

25

26

27

28

25

26

27

28

29

30


31








☐ Start week on Monday
 Create new event



DATE	EVENT	ATTENDANCE
2/7/2018	Small Group	Has not started yet
2/14/2018	Small Group	Canceled
2/14/2018	Galentines Dinner	Has not started yet
2/21/2018	Small Group	Has not started yet

If you change your mind, you can go back to the event and uncancel!

Description

B I S 

Come hang with some college students who are in #thestruggle. Midterms, crazy profs, and trying to afford rent are just some of the light topics we discuss.

Delete ▾

Un-Cancel

Save ▾

Delete Event

Scroll to the bottom of the event and select Delete.

Description

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Come hang with some college students who are in #thestruggle. Midterms, crazy profs, and trying to afford rent are just some of the light topics we discuss.

Delete ▾

Cancel Event

Save ▾

Delete this event

Delete this event and all occurrences after it

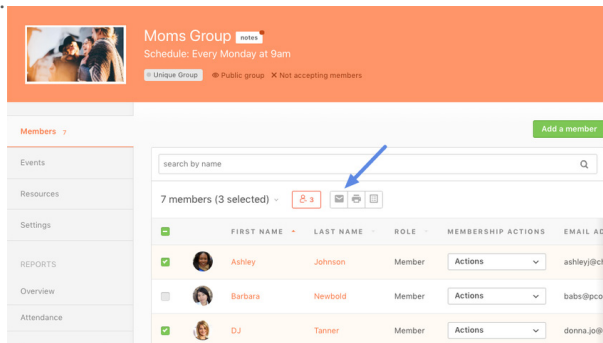
If your event repeats, choose to delete only this event or all future events as well.

Contacting Group Members

- To send an email that's not directly related to a group meeting, email group members from your group's Members tab or email more than one group from the People page.
- To email group members about a specific event, send a reminder email, which will include a link to the event.

Email Members of One Group

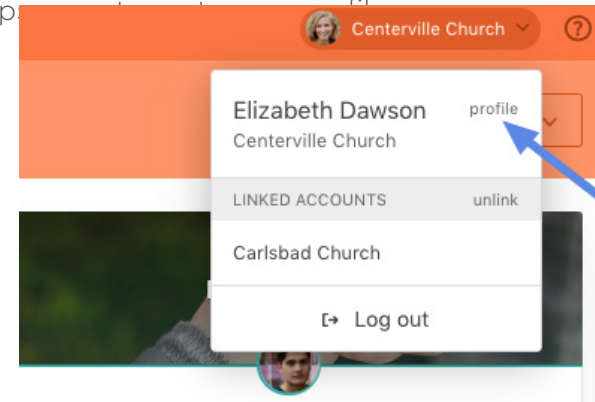
- To email members of your group, click the email icon at the top of the Members list.
- If you need to send a file to your group members, add the file to Resources, and point people to that resource in the email.



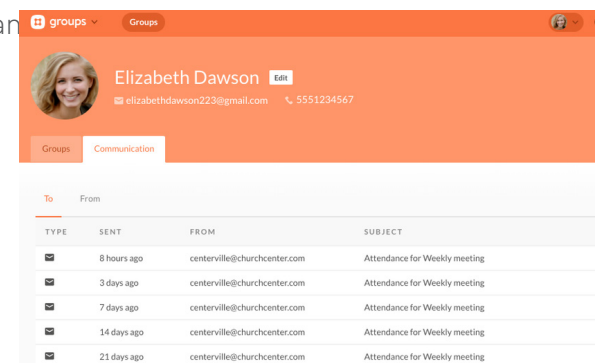
- Complete the subject and message in the email form, and then click Send.

View Sent and Received Emails

- You can view all of your sent and received Groups emails right from the Communication tab on your Profile.
- Leaders only have access to their own emails, but Administrators can view the Communication tab on all profiles.
- Click your profile image in the upper right corner of any Group.



- Click on the Communication tab to view emails you've sent and an



Undelivered Emails

If a member mentions they didn't receive an email, try these things:

- Check the People app to make sure their email address isn't blocked.
- Ask the member to tell their email provider to stop blocking Planning Center emails by adding `no-reply@planningcenteronline.com` and `no-reply@churchcenter.com` to their address book or by whitelisting those email addresses.

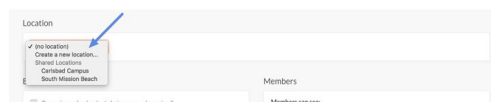
If neither of these help, contact support by clicking the ? in the top right corner of the app.

Adding and Editing Group Locations

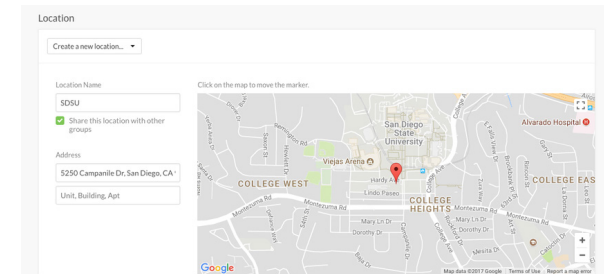
Locations are an optional feature that allow you to help members know where a group is meeting. Create locations from group settings and share them with other groups.

Create a Location

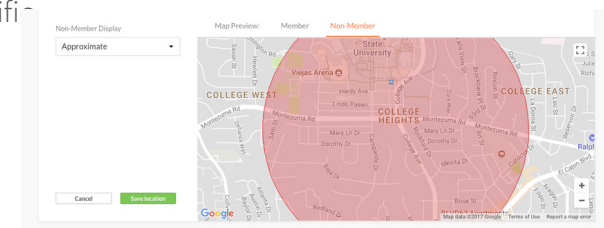
- From the Location section, select the dropdown to choose a location or create a new location.



- Any Shared Locations will be listed separately.
- When you create a new location, add the name and address then view the map to ensure the location is correct.



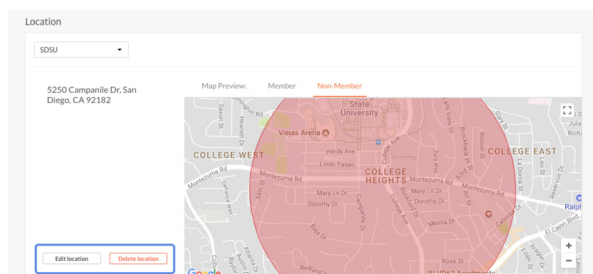
- If other groups or events might need this location, check the box next to Share.
- To pin a more specific location instead of an address, click the map.
- Set the location shown on the group's public page. Members will always see the exact address and location, but you can choose to make the public-facing location less specific.



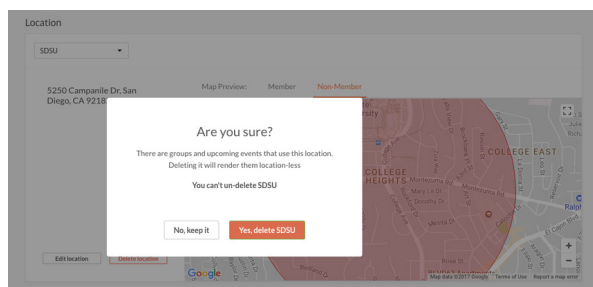
- For someone who isn't a member, you can set the option to Hidden, Approximate, or Exact location from the dropdown.
- Select Save location to add that location to your group or event and save its preferences.

Edit or Delete a Location

- Locations might be longterm, temporary, or they may even change over time.
- To update or delete a location, select a location from the dropdown within the group settings, then choose the option you need.



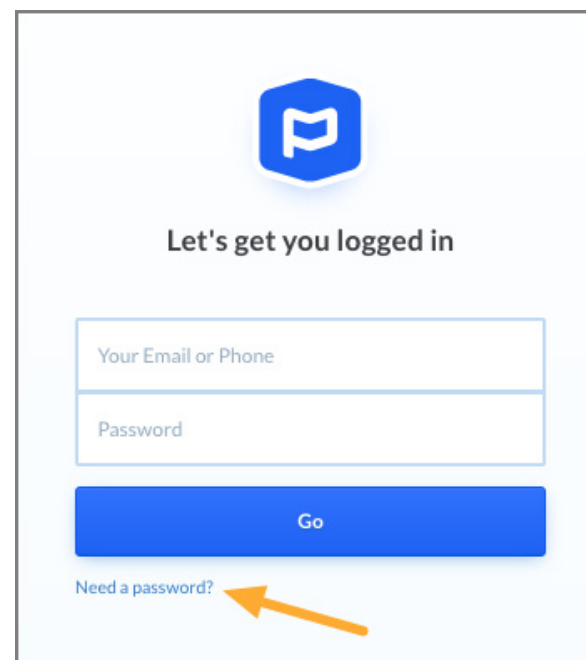
- The Edit location button will open the location settings and you can then update the name, address, or even the Non-Member Display options.
- Clicking Delete location however will completely remove the location from Groups.




- If this location is being used by any other groups or for any upcoming events, you will be prompted to verify this action.

Resetting Your Password:

- Reset your password by clicking Need a Password? on the login page.
- If you are not logged in to Planning Center, go to <https://planning.center/> and click Log in.
- On the login screen, click Need a password.



- Enter your email address or phone number when prompted, and then click Send Code.
- You will receive an email or text with a verification code. Click the link in the email or text to go to the verification page, where the code will already be entered.



← elizabethdawson223@gmail.com

We have sent a verification code to elizabethdawson223@gmail.com. Please enter it below.

198788

Continue

You can also manually enter the verification code from the email or text.

- Make sure that the verification code is entered correctly, and then click Continue.
- If you belong to multiple organizations, you'll see those listed. Check the boxes next to the organizations you want to reset your password for.
- Enter your new password, confirm it, and then click Reset my Password.

Congratulations, your password is reset!

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Foundry Discipleship

FOUNDRY UNITED METHODIST CHURCH

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