Charity Christian Church Development Guide

The purpose of the application is to reduce the amount of paperwork and effort Pastor White must do for tracking of the members, monetary donations and reports to be generated throughout the year.

A Personal Touch Learning and Design

4/11/2018

S. Moore

Background Information

This application was designed because the Instructional Designer noticed the Pastor was generating all the reports manually and sought for a more efficient way of creating these reports for Charity Christian Church. The Pastor had a manila folder for each person who donated each year. In the folder was a piece of lined notebook paper with their donation amount and date. When tax time came, he would make a copy of this information and give it to the members. The project was started December 2015. Pastor White has allowed S. Moore to become the consultant on this project. S. Moore has provided an "appropriate, economical, feasible and acceptable intervention" to the plight of the Pastor in recording, tracking and providing accurate tax information for the visitors and members of the church (Stolovich and Keeps, 2004, p. 143)

Topic:

Membership and Monetary Donation to Charity Christian Church

Type of Need:

Business – Non-profit (church)
Requires Reports –Tax Receipts, Monthly and Annual Donation Totals

Logo:

No logo has not been provided.

Analysis Document

Project Description & Needs Analysis

This document detail the analysis stage of the application. Provides a means:

- To track the visitors and members
- To track the monetary donations
- To provide accurate record keeping for balancing the accounts at the end of month and tax year.

Contextual Analysis & Unit Goals

The purpose of this application is to reduce the amount of handwriting information done by the Pastor. This application will allow the pastor to retain all paper (envelopes, membership cards, deposit slips) while processing all the paperwork electronically.

Transfer Context

Due to the small size of the church, this application should satisfy the needs of the church for many years to come. Individual videos, of each menu, will be created to enhance the learning of the application. As the individuals learn the application, they will be able to use their memory to navigate the application quicker (Ormrod, Schunk and Gredler, 2009, p.103).

Hopefully, a complete application video will be created that will take a person through the whole application in one video. This allows for the repurposing of the information to an online format (Noe, 2013, p. 332).

Unit Goals

- To track church membership
- To track monetary donations
- To provide accurate record-keeping for balancing the accounts at the end of the month and tax year.

Learner & Performance Gap Analysis

Learner Analysis

This application is to be use by the appointees of the pastor. At the time of development, access to this application will be limited to the pastor, his wife, the primary user and the developer. Morrison, Ross, Kalman, and Kemp (2013) suggests identifying the types of learner characteristics; the general, specific entry, as well as the personal and social characteristics (52 – 56).

Primary Audience	Pastor B. White, A. Wise-White, and S. Moore
Secondary Audience	D. Brail
General Learner Characteristics	All users are over the age of 40. All genders can use this application.
Entry Characteristics	Have basic computer skills Possess basic data entry skills
Prior Experience:	Basic understanding of the Microsoft Excel application
Errors made by novice learners:	Unable to enter data into the appropriate location of the application. Incorrect information added to deposit sheet. Forgot to enter visitor/ember's information before entering donation information.
Attitudinal and Motivational:	Recognize that data can be represented in multiple different ways. Some learners may believe that they understand how to use the Excel application.

Performance Gap Analysis

The current learner performance and desired performance at the delivery of the application is to reduce the amount of handwritten materials the Pastor currently does for record keeping and provide a more accurate method of reporting information to the IRS.

Procedural & Instructional Objectives

Procedural analysis

There will be training, user manual and videos, provided by the Instructional Designer, for all members responsible for the use of this application.

Design Document

Sequencing Description

The design of the application was:

1) Church Forms
    a. Visitor's Information Card
    b. Donation Sheet
2) The Database application
    a. Main Menu
        i. Membership
        ii. Offering
        iii. Reporting
        iv. Tax Statement

Developing church materials

A meeting was held with the Pastor's wife, A. Wise-White, to discuss what information should be on the Visitor's Information Card and the Donation sheet. There are two versions of the Visitor/Member form and six versions of the Deposit form.

Visitor/Member Form

The Visitor's Information form was created using MS Word. There are two (2) Information cards on one sheet. The fields are aligned with the information on the application member screen.

Charity Christian Church Visitor's Information

(Please print)

Title: Mr. ___ Mrs. ___ Miss ___ Ms. ___ Mr. & Mrs. ___ **Date**: ______________________________

Name: ____

Address: ____

City: __________________________ **State**: ________ **Zip Code**: __________ **Country**: _______________

Home Phone: (________) ____________________ **Cell Phone**: (________) ____________________

Email Address: ____

Membership Status: _____ Member _____ Visitor **Birth Month/Day:** ____________

How did you hear about Charity Christian Church? ____

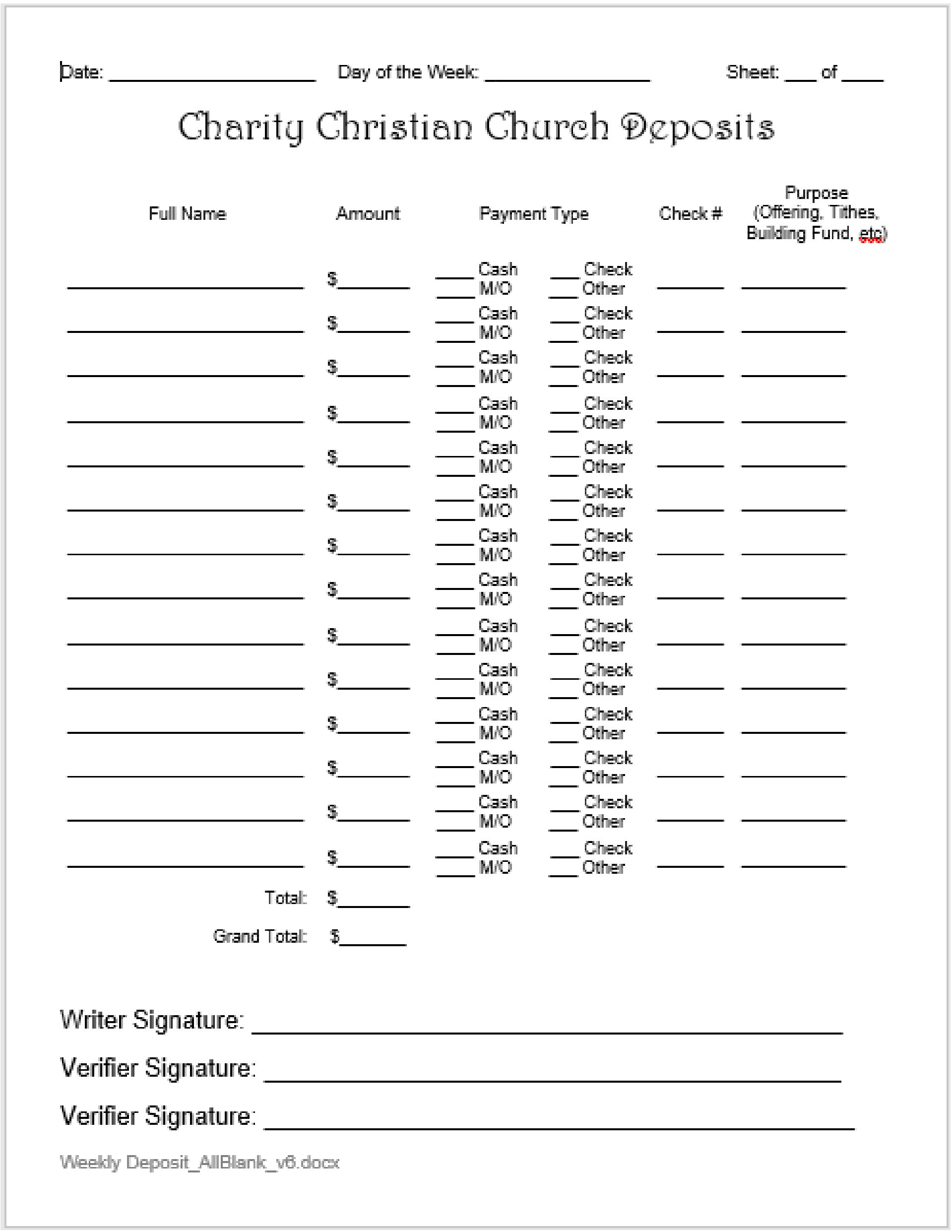
Who invited you to attend? ____

Comment:

This form will track all individuals that attend the church at any given service. There are two of these form per page.

Donation Form

The deposit form was created using MS Word. It has a table with 16 rows and six (6) columns for the main body. The footer should be updated each time there is a change to the form. We are currently on version 6 of this form; this version has prefilled names in alphabetic order. This information was agreed upon by the Pastor's wife. If nothing is entered in the Purpose field, then it goes to General Offering. The acceptable abbreviations are GO – General Offering, BF – Building Fund, BS – Bible Study, and TT - Tithes. This is a two-sided page.



Date: ____________________ Day of the Week: ________________ Sheet: ___ of ____

Charity Christian Church Deposits

Full Name	Amount	Payment Type		Check #	Purpose (Offering, Tithes, Building Fund, etc)
____________	$______	___ Cash ___ M/O	___ Check ___ Other	______	________
____________	$______	___ Cash ___ M/O	___ Check ___ Other	______	________
____________	$______	___ Cash ___ M/O	___ Check ___ Other	______	________
____________	$______	___ Cash ___ M/O	___ Check ___ Other	______	________
____________	$______	___ Cash ___ M/O	___ Check ___ Other	______	________
____________	$______	___ Cash ___ M/O	___ Check ___ Other	______	________
____________	$______	___ Cash ___ M/O	___ Check ___ Other	______	________
____________	$______	___ Cash ___ M/O	___ Check ___ Other	______	________
____________	$______	___ Cash ___ M/O	___ Check ___ Other	______	________
____________	$______	___ Cash ___ M/O	___ Check ___ Other	______	________
____________	$______	___ Cash ___ M/O	___ Check ___ Other	______	________
____________	$______	___ Cash ___ M/O	___ Check ___ Other	______	________
____________	$______	___ Cash ___ M/O	___ Check ___ Other	______	________
____________	$______	___ Cash ___ M/O	___ Check ___ Other	______	________
Total:	$______				
Grand Total:	$______				

Writer Signature: ____

Verifier Signature: ____

Verifier Signature: ____

Weekly Deposit_AllBlank_v6.docx

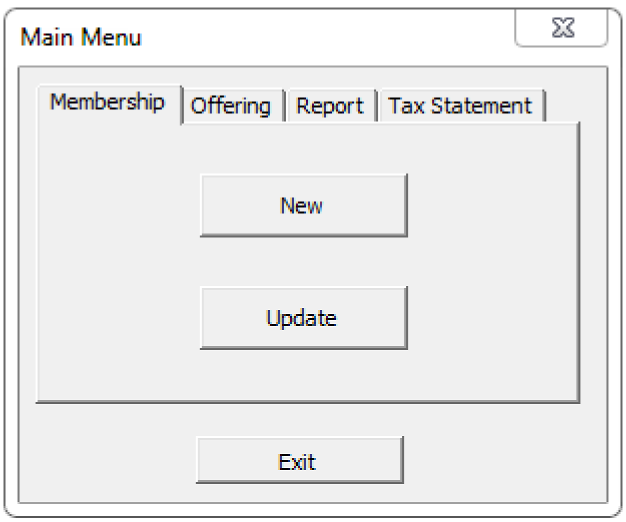
This document tracks the donations given, by whom, on what day and date, what type of payment, the amount and type of donation (tithes, offering, building fund, etc.). The version used by the church has pre-populated names for those that donation most often.

Storyboard

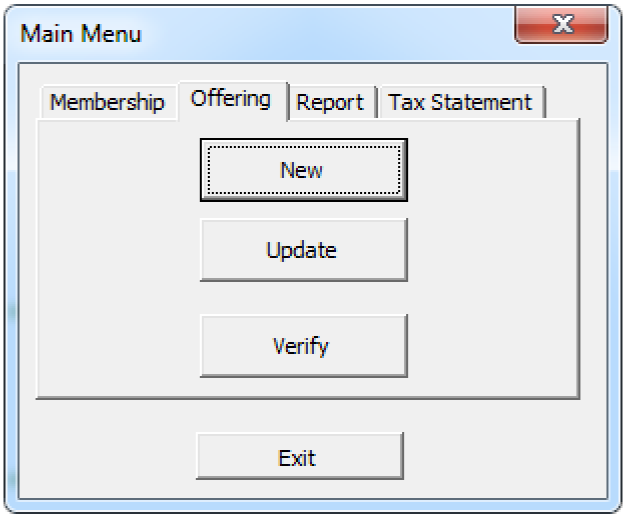
The storyboard was created after the design of the application. It will provide a screenshot of the main menu, submenus and messages (information and error). All documents are in the document folder under the Charity Christian Church directory. All forms are in the form directory. When making changes to the database, make a copy of the file to the Work In Progress folder.

Main Menu

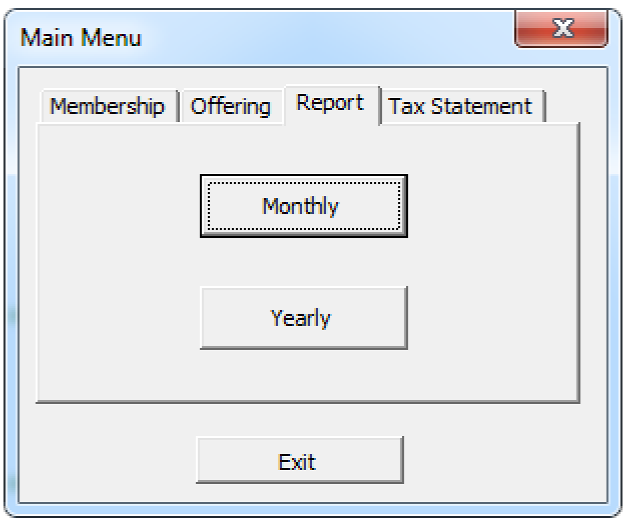
This section discusses the main tabs found on the main menu. It will also give a summary of the purpose of each tab and the buttons on each tab. The main menu is a multipage frame, with four (4) tabs/options. The submenu specific buttons are within the tabs/options with a global exit button to closs each submenu and the final close of the macro.



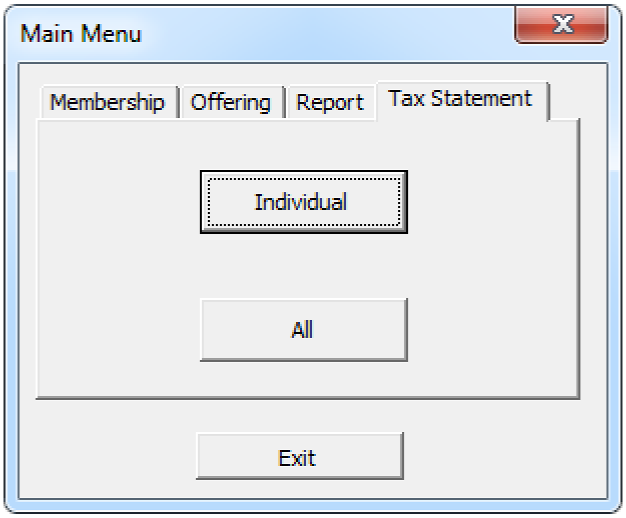
The database should open with the Membership tab selected. The Membership tab allows the user to add or update visitors and/or members to the database. Members should to be added to the database before their monetary donations are recorded. If a visitor's or member's information changes, use the update button to retrieve the current information, make the necessary changes and save those changes. The 'Exit' button closes the screen.



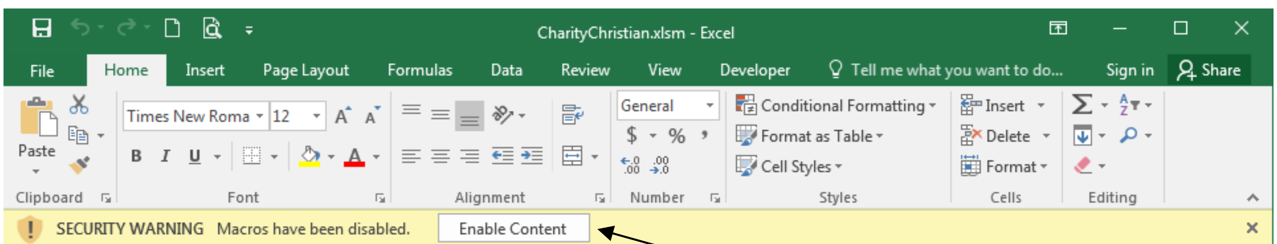
The Offering tab allows the user to add, modify any monetary information donated by a visitor or member, and to verify the donation amount from any given day. On the outside of the manila envelope, should be the date, the day of the week, the total amount donated amount and 'dbV'(database verified) with the initials of the individual who recorded the information in the database. The 'Exit' button closes the screen.



The Report tab offers the user the ability to run two (2) different reports. The monthly report creates a listing of all donations (Bible Study and Sunday Service) given for a particular month and year. The yearly report totals by months for a given year. The 'Exit' button closes the screen.



The Tax Statement tab provides the user the ability to print a tax statement (usually end of the year) for either an individual or all visitors/members of the church based on a certain year. The 'Exit' button closes the screen.



1) In creating the macro code, you may have to enable the macros to completely test the codes. When you first open the application, you may have to enable the macros. Click the enable content button.

Membership Menu

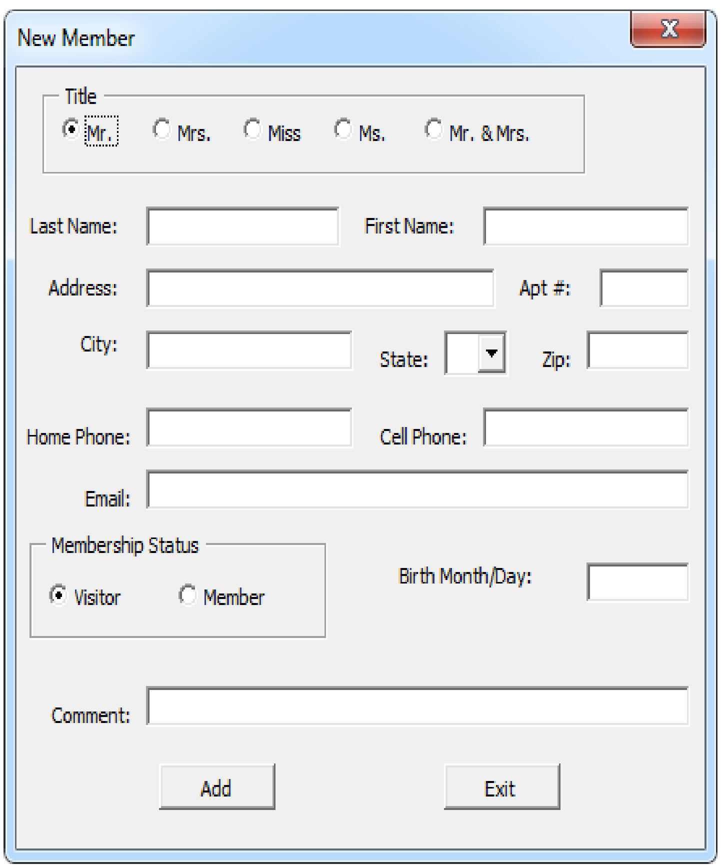
These screens allow the user to enter/update the information about any individual that attends any service held by Charity Christian Church. This information is taken from the Charity Christian Church Visitor's Information Card. The church currently has two (2) services, Church Service: Sunday 10 AM and Bible Study: Tuesday 6PM (originally Thursday at 6pm).

Pre-populated Fields

On both offering screens (New and Update), the 'State' dropdown is populated with all the states in the USA. On the Update screen, the name field is populated with all the names found on the membership tab of the application. Visitor is the default selection as you need to be a visitor before becoming a member and Mr. is the default title.

Note: On the membership sheet here is no camel-case checking.

New Member



<u>Fields</u>

Title (radio Button Group – Default Mr.)
Last Name (Textbox)
First Name (Textbox)
Address (Textbox)
Apt # (Textbox – Optional)
City (Textbox)
State (Dropdown – 2 Characters; pre-populated with current states)
Zip (Texbox)
Home Phone (12 characters, enter as XXX-XX-XXXX)
Cell Phone (12 characters, enter as XXX-XX-XXXX)
Email (Textbox)
Membership Status (Radio Button Group – default Visitor)
Birth Month/Day (5 char – MM/DD)

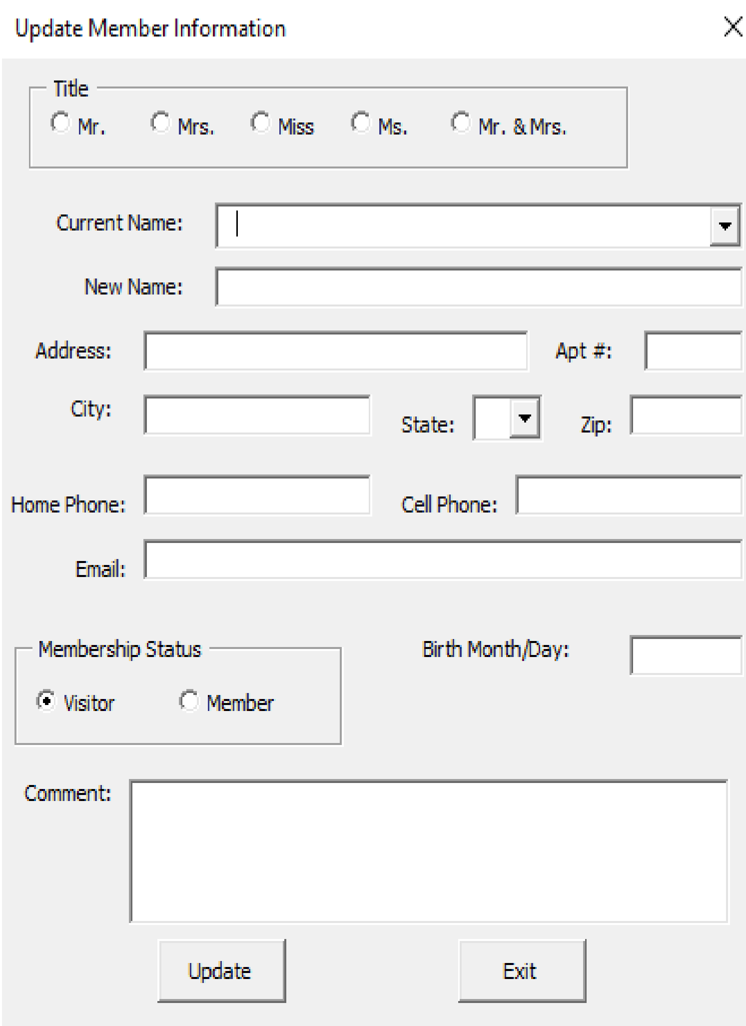
Add Button – Add information to Member tab
Exit Button – Closes the screen

The code behind the New button, finds the first empty row on the member sheet, add the information then sorts the data by last name. The exit button closes the screen and returns to the main menu.

Note:

1) None of the labels are enterable fields.
2) On the Update Screen, the first field is the Current Name field. When you choose a name from the dropdown list (populated from the Members list), it will populate all the fields with the information from the Members sheet for the date entered.

Update Member



<u>Fields</u>

Title (radio Button Group – Default Mr.)
Current Name (Dropdown – populated with names in the database)
New Name (Textbox – filled after selecting a name from the database)
Address (Textbox)
Apt # (Textbox)
City (Textbox)
State (Dropdown – 2 Characters; pre-populated with current states)
Zip (Textbox)
Home Phone (12 characters, enter as XXX-XX-XXXX)
Cell Phone (12 characters, enter as XXX-XX-XXXX)
Email (Textbox)
Membership Status (Radio Button Group – default Visitor)
Birth Month/Day (5 char – MM/DD)

Add Button – Add information to Member tab
Exit Button – Closes the screen

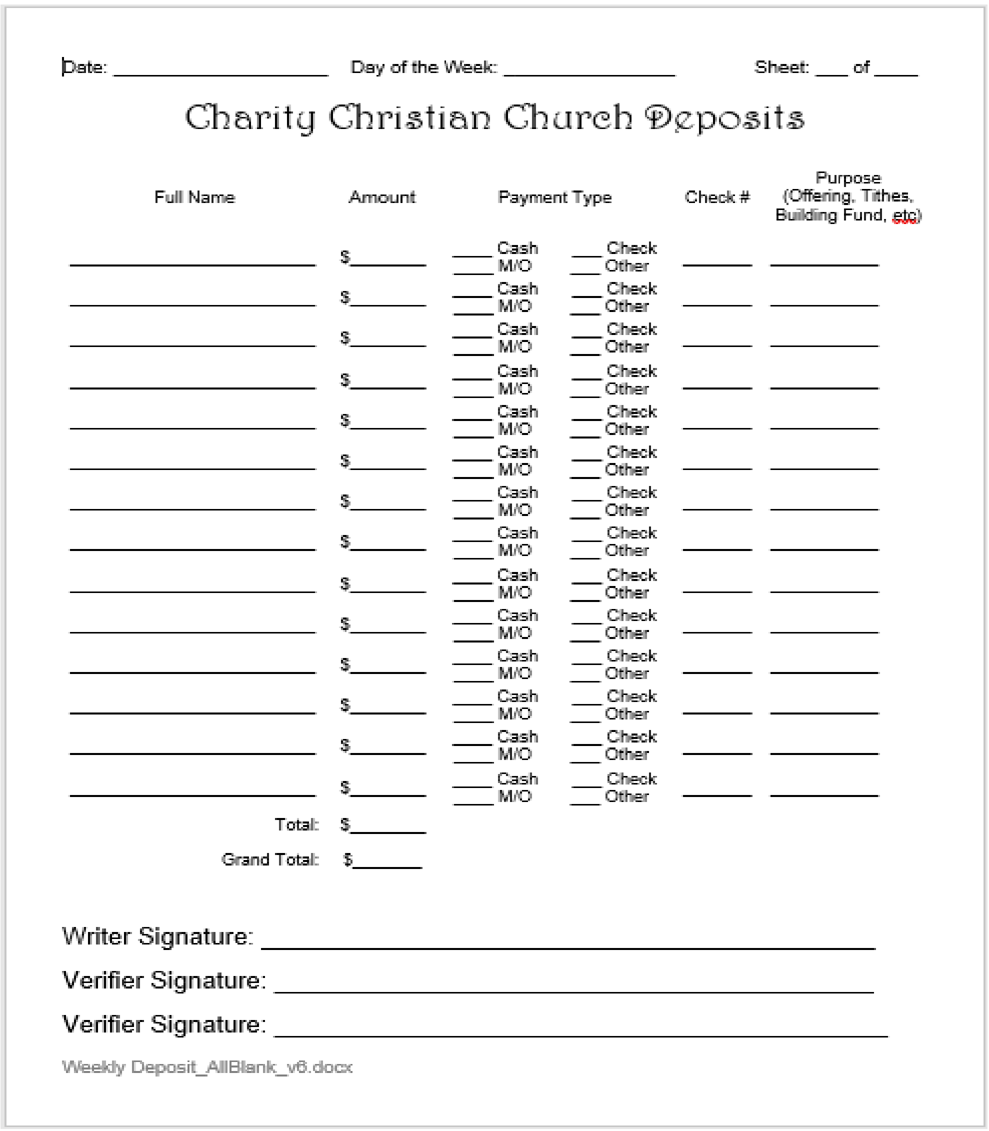
The code behind the Update button, finds the individual's data, allows for changes. It replaces the information for that Member. It re-sorts the data by last name. The exit button closes the screen and returns to the main menu.

Note:

3) None of the labels are enterable fields.
4) On the Update Screen, the first field is the Current Name field. When you choose a name from the dropdown list (populated from the Members list), it will populate all the fields with the information from the Members sheet for the date entered.

Offering

The information is recorded on the Weekly Deposit sheet which should be completed before entering the donation information into the application.



Date: ________________ Day of the Week: ______________ Sheet: ___ of ____

Charity Christian Church Deposits

Full Name	Amount	Payment Type		Check #	Purpose (Offering, Tithes, Building Fund, etc)
____________	$______	___ Cash ___ M/O	___ Check ___ Other	______	________
____________	$______	___ Cash ___ M/O	___ Check ___ Other	______	________
____________	$______	___ Cash ___ M/O	___ Check ___ Other	______	________
____________	$______	___ Cash ___ M/O	___ Check ___ Other	______	________
____________	$______	___ Cash ___ M/O	___ Check ___ Other	______	________
____________	$______	___ Cash ___ M/O	___ Check ___ Other	______	________
____________	$______	___ Cash ___ M/O	___ Check ___ Other	______	________
____________	$______	___ Cash ___ M/O	___ Check ___ Other	______	________
____________	$______	___ Cash ___ M/O	___ Check ___ Other	______	________
____________	$______	___ Cash ___ M/O	___ Check ___ Other	______	________
____________	$______	___ Cash ___ M/O	___ Check ___ Other	______	________
____________	$______	___ Cash ___ M/O	___ Check ___ Other	______	________
____________	$______	___ Cash ___ M/O	___ Check ___ Other	______	________
____________	$______	___ Cash ___ M/O	___ Check ___ Other	______	________
Total:	$______				
Grand Total:	$______				

Writer Signature: ______________________________

Verifier Signature: ______________________________

Verifier Signature: ______________________________

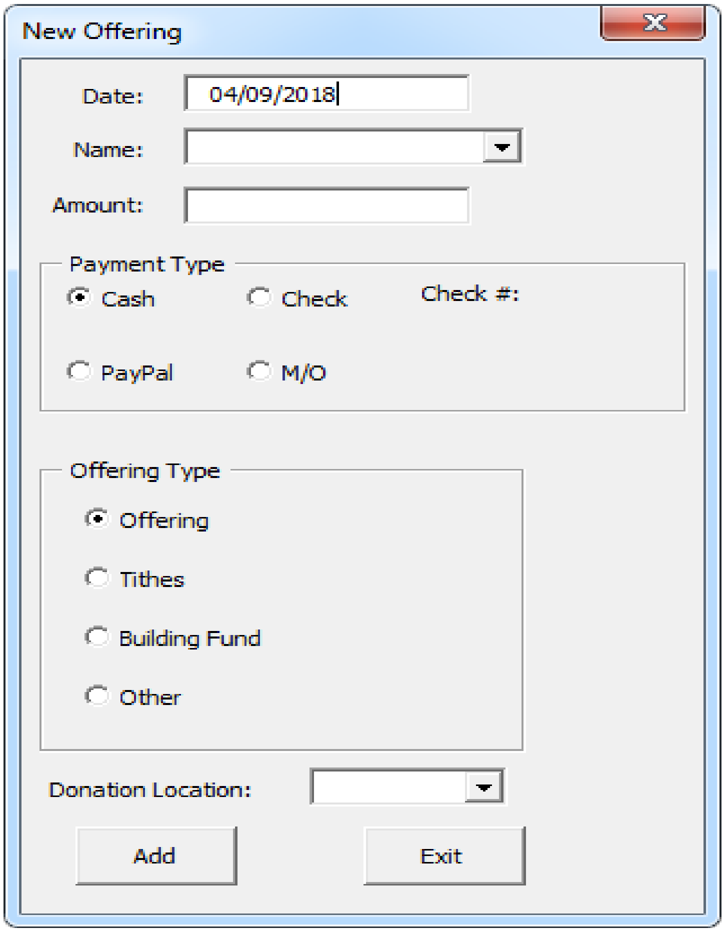
Weekly Deposit_AllBlank_v6.docx

If cash is given (envelope with no name or loose cash in the donation box), on the donation sheet write Guest, Date, and cash on the envelope. In the database, type 'Guest' in the 'Name' field, the offering type is 'General Offering' (default) to account for this money. If you need to update a donation, first choose a date then the member. Modify the appropriate information and click "Update'.

Pre-populated Fields

1) On the ‘New Offering’ screen,
    a. Current date is entered in the field as MM/DD/YYYY. This date stays in the field until there are no additional donations for that date or the screen is exited.
    b. Name field (dropdown) is populated with all the members (from the Membership tab of the spreadsheet) in alphabetic order by last name, first name.
2) On the ‘Offering Update’ screen,
    a. Current Name field (dropdown) is populated with all the members based on a certain date (from the Offering tab of the spreadsheet).
    b. New Name field (Textbox) is populated with the member’s name chosen from the current name field. If a name change needs to happen, this field is the new name.
3) On both screens,
    a. Donation Location field is populated with Sunday Service, Bible Study - Thursday and Bible Study – Tuesday. Thursday night Bible Study does not exist.
    b. You can use the tab button, mouse-click, or touchpad click through the data.

New

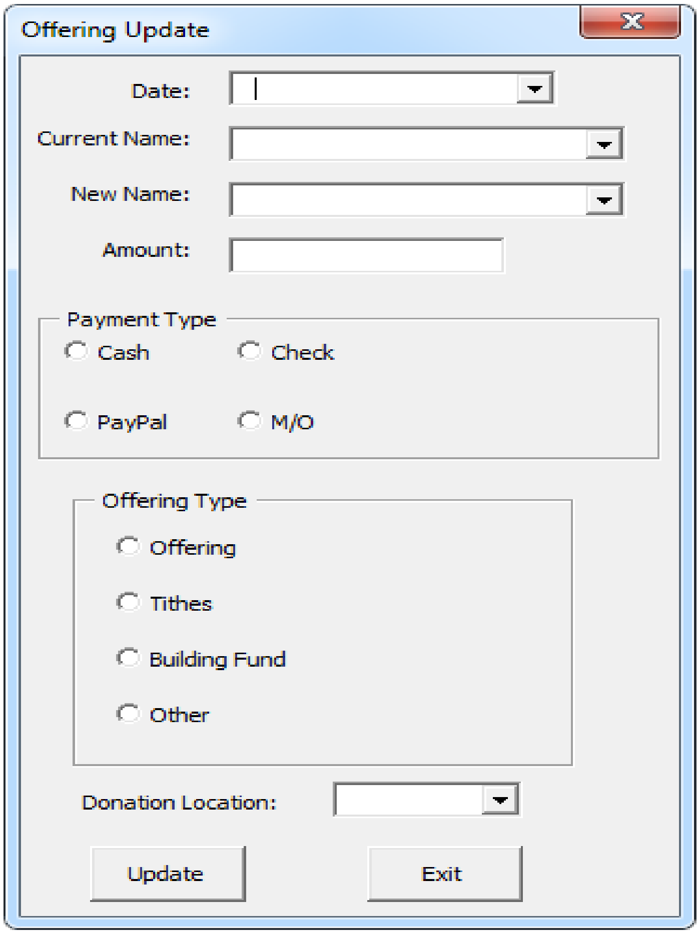


Fields

Date (MM/DD/YYYY – pre-populated with current date)
Name (Dropdown – populated with names from the member sheet)
Payment Type (Radio button group – default is cash)
Offering Type (Radio button group – default is Offering)

Add Button – Add information to Offering tab
Exit Button – Closes the screen

Update



<u>Fields</u>

Date (MM/DD/YYYY – pre-populated with current date)
Current Name (Dropdown – populated with names from the member sheet)
New Name (Dropdown – populated with names from the member sheet)
Payment Type (Radio button group – default is cash)
Offering Type (Radio button group – default is Offering)

Update Button – Update information to Offering tab
Exit Button – Closes the screen

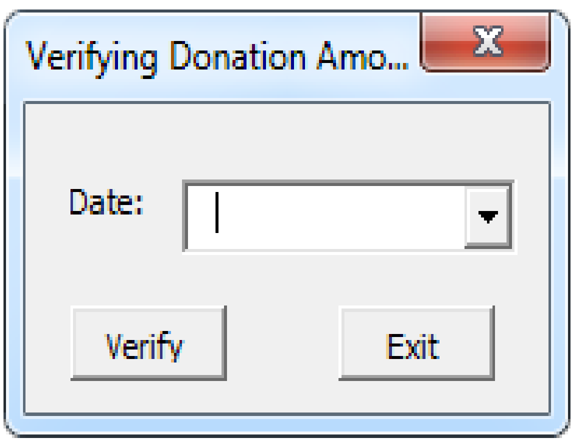
The code behind the Update button, saves all the changed information on the Offering Sheet. The exit button closes the screen and shows the main menu.

Note:

1) All fields are visible except for the 'Check #' and 'M/O #' fields. These fields will only be visible if the 'Check'or 'M/O' radio button has been selected.
2) You can have only one (1) option for Payment Type.
3) You can have only one (1) option for Offering Type.
4) You can have only one (1) Donation Location.
5) You cannot leave the screen without entering a Donation Location, unless you Exit without saving any information.
6) On the Update screen, the current name cannot change but can change the name on the New Name field (e.g. married/divorce, assigned wrong name to a donation).
7) PayPal is no longer an option. The fees associated with this payment type was too much for the church to handle.
8) If a blank record is added it will be removed when you leave the offering sheet.

Verifying Deposit Amount

This screen is to verify that total written on the deposit sheet matches what has been entered into the database. This is also the amount that should be written on the outside of the manila envelope and what should be deposited into the account at Chase bank. Only the individuals on the account can request the balance in the account.



Field

Date (10 Char MM/DD/YYYY)

Verify Button – Adds total donation information for a data from the Offering Ta.

Exit Button – Closes the screen.

The code behind the Verify button sorts the data by date then adds all the donation amount for that date. A message box is displayed with the total donation amount.

Note:

1) None of the labels are enterable fields
2) If no date is selected, error message is displayed.

Reports

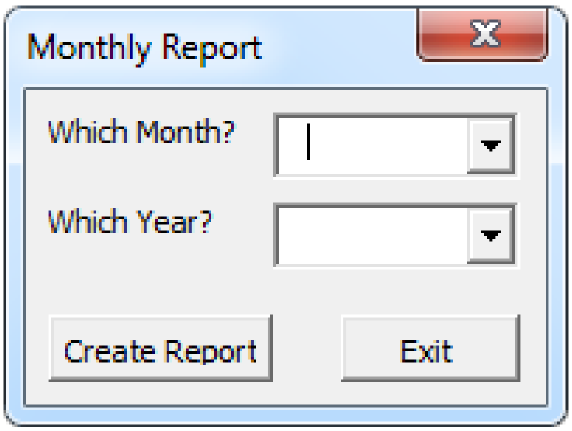
There are three (3) reports that can be generated.

1) Monthly – generates a monthly report of monetary donations (helps to balance the account)
2) Yearly– generates a total (by month) of the monetary donation
3) The Tax Statement tab provides the user the ability to print a tax statement (usually end of the year).
    a) Individual
    b) All visitors/members

All reports are printed by default, if a printer exists. If not, a message box will appear to tell you to print later.

Monthly

This report allows the generating of a report based on the donations given during any given month and year. If no data exist for that month and year, the sheet is deleted.



<u>Fields</u>

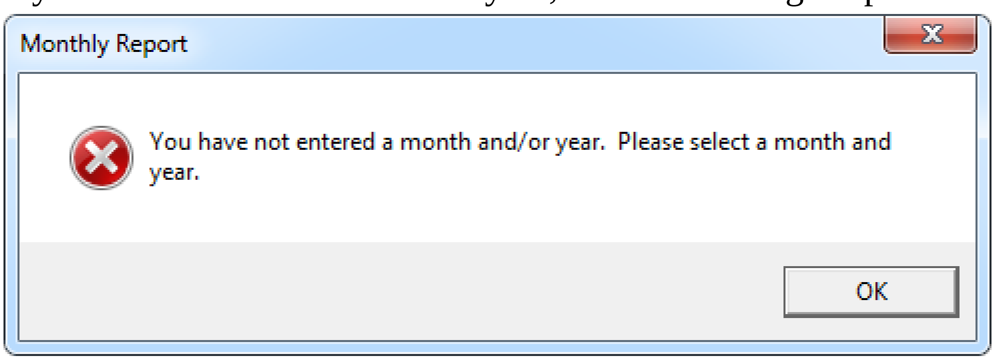
Month (Dropdown; Populated with Months Names)
Year (Dropdown; Populated with the years in the database)

Create Report Button – Adds a new sheet named “<Month Year>” and add the offering information for that time span.

Exit Button – Closes the screen.

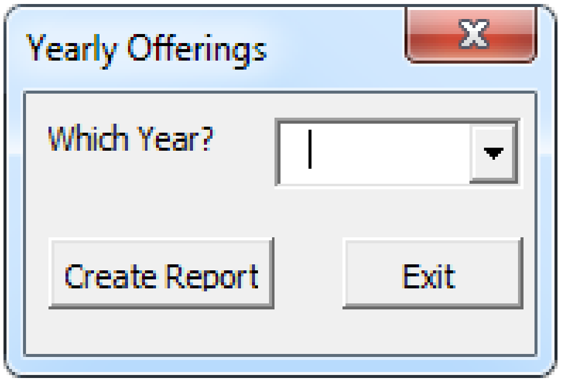
Note:

1) None of the labels are enterable fields
2) If you do not choose a month or year, an error message is produced.



Annually

This screen will allow a report to be generated based on a given year. The report will list a total for each month during that year with a grand total.



Fields

Year (4 char - Dropdown; Populated with the years in the Offering Tab)

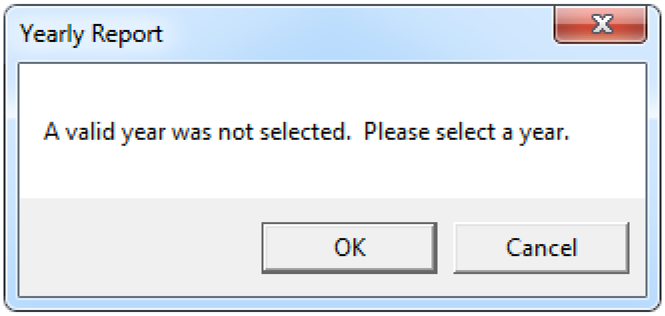
Create Report Button – Adds a new sheet named <Year> and adds a total for each month until the current month from the Offering Information.

Exit Button – Closes the screen

The code behind the Create Report button, sorts the Offering data by date, using the year, creates a running total by month, and prints the monthly total on the Year sheet. When the end of the months, per the database, has been reached it them adds the grand total to the sheet. The code behind the exit button, closed the screen and returns to the main menu.

Note:

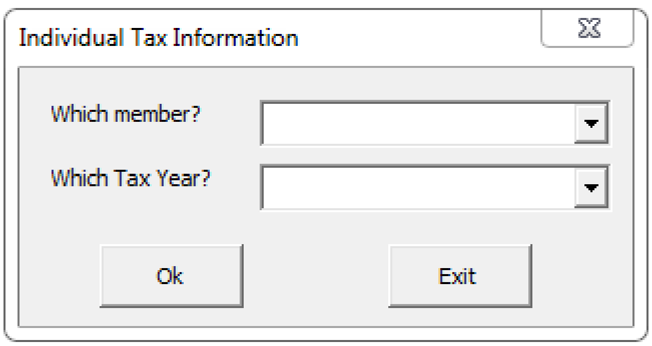
1) None of the labels are enterable fields
2) If you do not choose a year, a message box will be displayed to ask to you do so.



Tax Statement Information

This screen will allow a report to be generated based on a year. This report could be either an individual report or an end-of-the-year report for taxes. All reports are printed (default) if a printer exists. If not, a message box will appear to tell you to print later.

Individual Tax Information



Fields

Member (Dropdown, Populated with the name from member's sheet)

Tax Year (Dropdown; Populated with the years in the Offering Sheet)

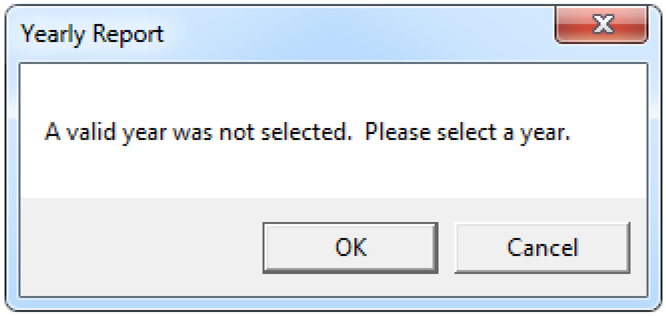
Ok Button – Adds new sheet named "<Year MemberName>" and adds the information for the member.

Exit Button – Closes the screen.

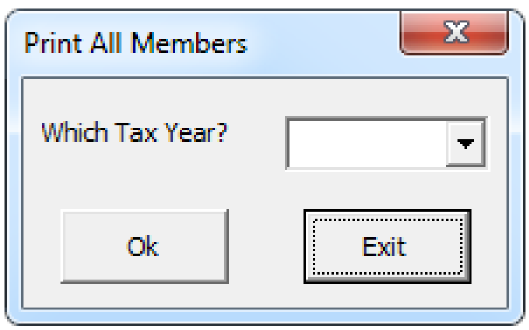
The code behind the Okay button is to sort the Offering Sheet by individual then by year. It will create a sheet with the individual's name and year. It then prints all the donations on the sheet with a grand total. The code behind the exit button closes the screen and returns to the main menu.

Note:

1) None of the labels are enterable fields
2) If no data exist for a given the sheet is deleted upon exit.
3) If you do not choose a year, a message box will be displayed to ask to you do so.



All Members Information



Fields

Tax Year (4 char – Dropdown; Populated from years in Offering Sheets)

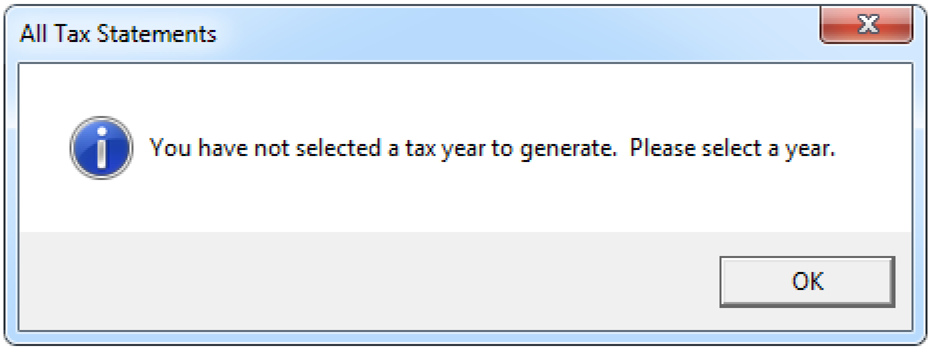
Ok Button – Adds a new sheet named “<Member Name>” and add the Offering Information for that time span.

Exit Button – Closes the screen.

The code behind the Ok button sort the data on the Offering Sheet by date. It creates a sheet with the individual’s name and the donation for that year with a grand total. It prints the next individual until all sheets have been created. It will print the sheet if there is an attached printer. There is a message to states to close all the windows before printing if not printer is attached.

Note:

1) None of the labels are enterable fields
2) If no year is chosen, an error message is displayed.



Technology Concerns

The technology concerns for this project are a dedicated computer/laptop is needed with access to WI-FI. The next concern is access to the software to create the application, documentation and/or videos.

1. Materials needed by the developer
   a. Computer – monitor, keyboard, mouse, speakers
   b. Internet
   c. Printer
   d. Access to the Dropbox directory (ownership will be transferred to Pastor when application is delivered)
   e. Software
      i. Microsoft Excel 2007 or later: creation of the application
      ii. Multimedia Software: Creation of the training video
      iii. Microsoft Word 2007 or later: creation of documentation

2. Materials needed by the users
   a. Computer – monitor, keyboard, mouse
   b. Internet
   c. Printer - optional
   d. Access to the Dropbox directory
   e. Software
      i. Microsoft Excel 2007 or later
      ii. An application to play the training video

Application Design

The application will be created using Microsoft Excel macros. The initial thought was to have four (4) major macros – entering membership and donations data, reporting (monthly and yearly donations) and tax information (individual or all individuals). There should be a method to enter new and as well as to update existing data.

Multimedia design

A screencast of the working application will be created using Tech Smith Camtasia. The video will hopefully be less than 15 minutes in length. It will show all features of the application in bite-sized pieces.

Do not assume that every audience will understand the pictures they see or interpret them in the way they were intended.

Development Guide

Instructional materials

The instructional designed of this application is to use Microsoft Excel 2007 or later in conjunction with macros. The macros will be designed to handle all the mundane processes. These processes are used to enter the data, place it on the appropriate sheets and generate any reports deemed necessary.

Several training videos will be created to show the routine of each process. The latest version of Camtasia will be used to create these videos. It is a computer program that lets you capture audio, video, animation, and still images. These training videos will provide instructions for the user on how to appropriately use the application.

Delivery methodology

Since the file will reside in a Dropbox directory that is shared, there is no need to deliver the application. This directory will have the following additional directories:

1. Documents directory contains the Reference Guide, Design Documentation, Flowchart, and Job Aid for the application (Stolovitch and Keeps, 2006, p. 87 - 89).
2. Forms directory contains all versions of the church letterhead, visitor information card, donation form.
3. Letters directory contains any references and business letters created by Pastor.
4. Logo directory contains any versions of the logos created for the church.
5. Media directory contains any media such as pictures and/or videos.
6. Reports directory contains any reports which needs to be saved such as the monthly and yearly reports. This directory will also hold any report that needs to be mailed to an individual.
7. Video directory contains any training videos regarding the application.
8. Work In Progress directory contains the working database. This directory will be used to make and test changes to the database.

The root directory contains the live database. A copy of this must be copied into the Work In Progress directory before making any changes to the database.

Instructional Plan

Training will take place in person and via some instructional videos, which can be replayed at any time for anyone with access to the directory. These videos will go together with the documents.

Implementation Plan and Facilitator Guide

Pre-Planning - Users environment, equipment, and materials

This section contains the physical equipment required to implement the database. The pastor will be purchasing the laptop with the required software.

1. Equipment/Software needed for Implementation
    a. Functional Computer – Available for each service
        i. Monitor/CPU with a keyboard; mouse - optional
        ii. Laptop
        iii. Tablet
    b. Speaker or Headphones
    c. Microsoft Excel 2007 or later
    d. High-speed or Broadband Internet (needed to update the database)
    e. Paper & Pen

2. Usage Environment
    a. Anywhere where a computer/laptop/tablet and internet access exist

3. Materials Needed for Implementation
    a. N/A

4. Logistical Considerations (hindrances)
    a. Inadequate computer equipment
    b. Limited or no Internet access

Application Delivery

Delivery

A shared link to Dropbox was emailed to each person involved with the process. The Pastor can share this Dropbox with whomever he deems necessary.

Any changes to the application, enhancements, should be done in the Work in Progress (WIP) directory. Make a copy of the application from the CCC root directory into the WIP directory before making any change. When changes have been tested, make a copy and paste into the root directory. If changes are made to the root directory file before the changes in the WIP directory is complete, you will need to open the root directory file and copy the data, open the WIP file and copy the data into that file.

Facilitator Guide

A facilitator's/reference guide will be created and stored in the document directory. It will discuss the various screens and purpose in the application. When major changes are made, the reference guide, flowchart and videos will need to be update as well.

Evaluation Plan

This section discusses how to determine if the database is working as designed.

Evaluation Process

The effectiveness of the application will be determined by the quality of the reports generated by the application. These reports include monthly and yearly reports (balancing of the church's bank account), and the individual and group annual IRS tax reports. Those that are extremely diligent in double checking their tax statement. If errors are found, any person designated to enter donation information need to fix the mistakes.

References

Morrison, G. R., Ross, S. M., Kalman, H. K., & Kemp, J. E. (2013). *Designing effective instruction (7th ed.)*, Hoboken, NJ: John Wiley & Sons, Inc.

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Ormrod, J., Schunk, D., & Gredler, M. (2009*). Learning theories and instruction (Laureate custom edition)*. New York: Pearson.

Stolovitch, Harold D. & Keeps, Erica J. (2004). *Training Ain't Performance.* Danvers, MA: ASTD Press.

Stolovitch, Harold D. & Keeps, Erica J. (2006). *Beyond Training Ain't Performance Fieldbook.* Alesandria, VA: ASTD Press.