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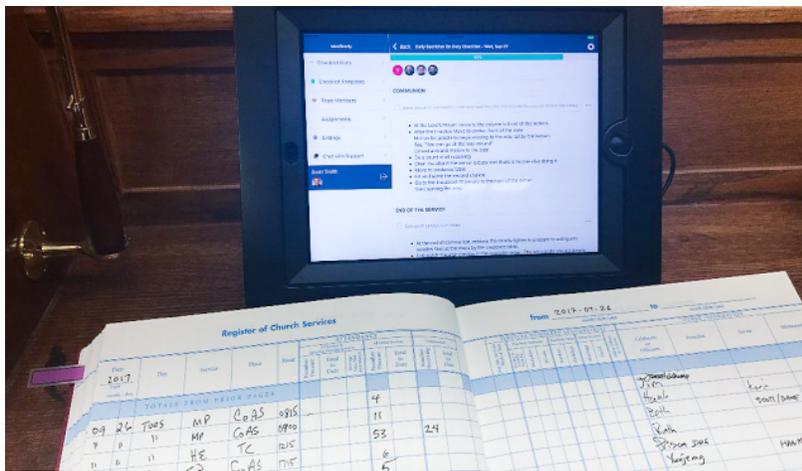

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For information about submitting news and announcements to the blog, click HERE or contact ideas@vergervoice.org.

Friday, September 29, 2017

The Verger Checklist App

Manifestly on the iPad in the Sacristy of Trinity Church Wall Street

By the Rev. Deacon Hank Tuell, Trinity Church Wall Street, htuell@trinitywallstreet.org

Last week, David Deutsch reviewed The Checklist Manifesto: How to Get Things Right and emphasized the importance of verger checklists and how good ones can help us to avert disasters.

I think we all have at least one story of a situation, often times embarrassing, that could have been avoided if we had been using a checklist. When I first started at Trinity Church Wall Street, as a sacristan while in seminary at GTS, I set up everything for a primary service in the historic nave. I was sure I had gotten everything setup correctly. As the priest and the server were setting the table for the Eucharist, they both suddenly had a puzzled look on their faces. They kept looking at each other and looking back at me at the credence table. I immediately knew something was wrong. Finally, the server walked over and told me the priest host was missing. Still today I have to check, double check and triple check the setup before I am comfortable that the priest host is there. Unfortunately, when I started at Trinity, we did not have checklists – it was all done by memory.

We ventured into the world of creating checklist documents for all our services not too long after that. The checklist documents were a major leap forward as they gave us the ability to work in tandem with multiple people working off the same checklist. Although this was a major step for our team, there was still one drawback: we had to return the sacristy each time to mark off the steps we completed and to check what the other sacristans had done. So, we began the search for a product that would help us advance our checklist system to the next level.

We were thrilled to find a product called Manifestly that exceeded our expectations of a shared checklist application. Manifestly was created by Philip Crawford (philip@manifest.ly) who is enthusiastic about our using his product in various church settings. We asked Philip how he got the idea to create Manifestly, and he said, "I was really excited to read The Checklist Manifesto and quickly realized that there was no one shared checklist app available out there to implement those concepts in a collaborative environment."

There are many other apps available for electronic checklists, but Manifestly's ability to schedule, notify, and share checklists with multiple sacristans, vergers, and others has been really important for us at Trinity.

We have been in the process of moving our paper checklists over to Manifestly for a few months and we have been very pleased with it. The multi-platform application gives us the ability to have multiple people working on their Android, iPhone, iPad or computer completing the tasks on the shared checklists. The product has significantly improved our productivity, especially on the tasks during the quick turnaround between services. We have also reduced the number of mistakes or missed steps.

What appears to be a very basic checklist product is actually full of very useful features. It has also allowed new staff to get up to speed quickly with our processes. For instance, we have a daily "Sacristan on Duty" checklist that encompasses all of our services for every weekday. We go from our first morning prayer service through our evening prayer or evensong service. The ability for each of us to complete different tasks throughout the day and not waste time verifying who has completed what has significantly improved our efficiency.

We have also found Manifestly indispensable for those services that happen once a year or on rare occasions. You know, the services where you spend a significant amount of time trying to remember what it was you did last year – trying to decipher what it was you meant by the description in the notes. Manifestly has the ability to attach pictures, videos and outside documents to tasks. So you don't have to try and piece together from memory how the credence table was set up last Easter. You can just look at the picture on your task.

Manifestly truly has met and exceeded all of our checklist needs and for a very small cost. You can have internal users as well as external users. You can schedule the checklist and who is assigned to them, so each member is emailed and notified that a list has been assigned.

Here are some of the features we have found most useful:

- You can schedule lists to be assigned automatically to both internal and external users enabling staff and volunteers to work on the lists together.
- You can import lists from Word or Excel
- You can add notes and descriptions if steps need further clarification.
- You can add photos, videos, and links to outside documentation. This has been very useful for services that happen less frequently such as baptisms and funerals.
- The product is easy to use and does not require extensive training to implement.
- The support for the product has been very responsive and a pleasure to work with.
- The product runs on Android, iPhones, iPads, Macs, and Windows. Being able to walk around and check items off on our phones has increased accuracy and productivity.

I highly recommend Manifestly because of the versatility to handle daily, weekly and yearly scheduling. Manifestly has also increased our accuracy significantly. The days of the mental checklist has ended and I can't tell you how much that has helped to reduce anxiety, wasted time and mistakes!

Did you know that we have a huge number of shared documents in the Vergers Document Library online? See vergers.org/resources/library.

We have a whole section of Verger Checklists in the library that you should explore.

You can also submit your own checklists to Eileen Brightwell Hicks the volunteer Document Library Manager at docs@vergers.org for possible inclusion in the library!

The 2017 VGEC Annual Conference deadline to register is **Monday, October 2, 2017**. **We cannot accept on-site registrations!** Registration is **$275.00** per person.

Abstract: How do you make checklists work in your verger ministry? Do you use a technical solution or a good old-fashioned paper checklist? The Rev. Deacon Hank Tuell of Trinity Church Wall Street, describes one technical application called Manifestly that was built as a result of the The Checklist Manifesto which we reviewed last week.

Posted by Scott Smith at 1:26 PM

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