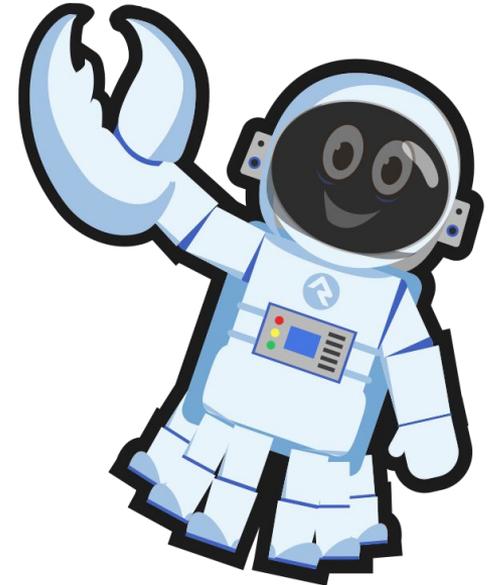
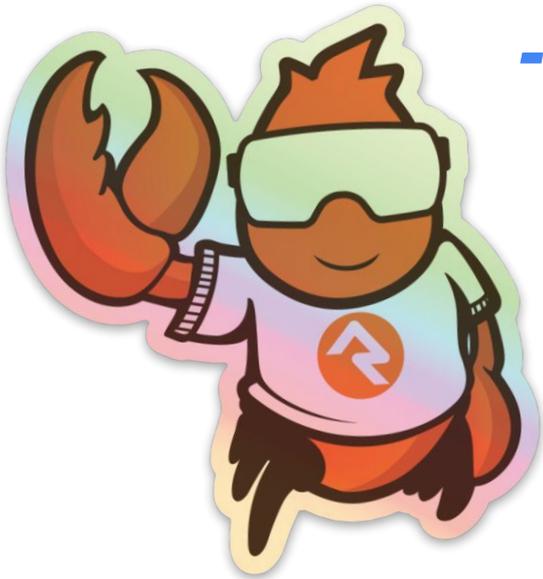


Lapsing Volunteer Connection Campaign

-- Lightning Round --

RX2022 - Frank Grand



Problem to Solve

- As a church that wants to grow, we need to keep an eye on our ‘infrastructure’ part of which is our volunteer/shepherding teams. We need to always have an accurate representation of our volunteer rosters.
 - We have reports that staff can access to show people who haven’t served in a given time period, but it was hard to keep people accountable to checking that report and we wanted these ‘lapsing volunteers’ more in front of our staff so follow up could happen in a timely manner and our rosters be as clean as possible
-

The plan of attack

- Use Group Attendance Reporting Job to create First/Last Serve Date Attributes
 - Create a Connection Campaign that creates requests as soon as a volunteer on roster hasn't served in 60 days
-

Group Attendance Reporting Job Setup

- This job allows you to select a groups data view and then create Person Attributes for attendance to those groups
 - The values you can create are First/Last Attended and Times Attended in 12m/16w
- Data View Setup example

f_Active Vol Groups > AND

Id: 2867

Persisted 18 Hours Ago

+ Create Report



Applies To

Group

Category

Volunteer Groups

13389 Runs Since 6/22/2021



Last Run: 8/9/2022

Filter

Not Included in 'f_EXCLUDED VOLUNTEER GROUPS' Data View AND Is Active Equal To 'Yes' AND (Included in 'f_Connect Class Volunteer Groups > AND' Data View OR Included in 'f_Worship Arts Vol Groups > AND' Data View OR Included in 'f_AND Event Volunteer Groups' Data View OR Included in 'f_AND Fuse Volunteer Groups' Data View OR Included in 'f_AND Connections Volunteer Groups' Data View OR Included in 'f_AND KidSpring Volunteer Groups' Data View OR Included in 'f_AND Discipleship Volunteer Groups' Data View OR Included in 'f_Rally Volunteer Groups > AND' Data View OR Included in 'f_Facilities/Safety > AND' Data View)

Group Attendance Reporting Job - 2

- Job Settings:

Job Type •

Group Attendance Reporting

Group Data View i •

▼ f_Active Vol Groups... ▼

Reporting Label i •

All Serving Groups

Tracked Values i



First Attended Date



Last Attended Date



Times Attended in Last 12 Months



Times Attended in Last 16 Weeks

- Resulting Attributes:

All Serving Groups - First 1/17/2010
Attended Date

All Serving Groups - Last 2/26/2019
Attended Date

Connection Campaign Setup

- Connection Campaigns are a way to generate connection requests in bulk for a special purpose. Check out 'Engagement' manual for more details
- Started with creating a 'default' Connection Type with one opportunity.

The screenshot displays a user interface for managing connection campaigns. It is divided into two main sections: 'Volunteer Follow Up' and 'Connection Opportunities'.

Volunteer Follow Up: This section has a title bar with a dropdown arrow. Below the title bar, there are two buttons: a green 'Edit' button and a green 'Delete' button. To the right of these buttons are two icons: a document icon and a lock icon.

Connection Opportunities: This section has a title bar with a dropdown arrow. Below the title bar, there is a 'Filter Options' dropdown menu. To the right of the filter options are three icons: a grid icon, a document icon, and a plus icon. Below the filter options is a table with three columns: 'Name', 'Summary', and 'Status'. The table contains one row with the following data:

| Name | Summary | Status |
|-----------------------|---------|--------|
| Not Served in 60 Days | | Active |

Below the table, there is a pagination control with three buttons: '50', '500', and '5,000'. To the right of the pagination control is a text label '1 Connection Opportunity'. At the bottom right of the section, there are three icons: a grid icon, a document icon, and a plus icon.

Connection Campaign Setup - 2

- We then created a data view for all volunteers who we wanted to use the Connection Campaign On. The data view included volunteers with a 'last serving date' more than 60 days ago (created with the Group Attendance Job)

The screenshot shows a data view configuration interface. At the top, the title is "r_Volunteers with no attendance 60 days" with an ID of 8568 and a "+ Create Report" button. Below the title, there is a description: "Anyone in f_Volunteer Group>All and haven't served anywhere in 60 days". To the right of the description, it says "93 Runs Since 6/28/2022" and "Last Run: 8/11/2022". Underneath, it specifies "Applies To Person" and "Category Volunteers". The filter section is titled "Filter" and contains the text: "Included In 'f_All Volunteers > ALL' Data View AND All Serving Groups - Last Attended Date Less Than Or Equal To 'Current Date minus 60 days'". The phrase "All Serving Groups - Last Attended Date" is highlighted with a red rectangular box.

r_Volunteers with no attendance 60 days Id: 8568 [+ Create Report](#)

Anyone in f_Volunteer Group>All and haven't served anywhere in 60 days **93 Runs Since 6/28/2022** Last Run: 8/11/2022

Applies To
Person

Category
Volunteers

Filter
Included In 'f_All Volunteers > ALL' Data View AND **All Serving Groups - Last Attended Date** Less Than Or Equal To 'Current Date minus 60 days'

Connection Campaign Setup - 3

- Then using the Connection Type, Opportunity and the Data Views created, we set up the campaign

Campaign Configuration

Default Configuration for the campaign.

Campaign Name * Active

Connection Type ⓘ *

Connection Opportunity *

[Show Advanced Settings](#)

Who Should Be Connected

Determines who will be considered for creating connection requests.

Requestor Data View ⓘ * **Family Limits ⓘ ***
 Limit to Head of House Everyone in Data View

Opt Out Group ⓘ

Request Creation Settings

These settings determine if requests should be auto created and assigned.

Create Connection Requests ⓘ *
 As Needed All at Once

Daily Limit of Assigned Connection Requests ⓘ

Recurrence Settings

The settings determine if connection should be created on periodic basis.

Number of Days Between Connection ⓘ *

Staff Process

- As requests are created resolution happens when volunteers are removed from roster or a note is created indicating why someone is on a roster without serving for 60+ days

The screenshot displays a dashboard for managing volunteers. The main heading is "Not Served in 60 Days". The interface includes a top navigation bar with options like "+ Campaign Requests", a star icon, and a refresh icon. Below this is a secondary navigation bar with "Opportunities", "+ Add Request", "All Connectors", "Sort", "Filters", "Campus: GVL", and "List". The main content area is divided into two columns: "No Contact" with 233 items and "In Progress" with 0 items. Two volunteer cards are visible in the "No Contact" column. Each card shows a progress bar, a profile picture, the name (Brandon and Adam), a "GVL" tag, a "No Activity" status, and a "2d" duration. A "Blur" button is present on the right side of the cards. On the left side of the dashboard, there are partial labels: "Group Wors" (highlighted with a red box), "Edit", and "Activi".

Group Name Lava

```
{% if ConnectionRequest.ConnectionOpportunityId == 35 %}
```

Groups they are in:

```
{% sql %}
```

```
SELECT (g.[Name]) AS 'Name', gt.[Name] AS 'GTName'
```

```
FROM [GroupMember] AS gm
```

```
INNER JOIN [Group] AS g on gm.GroupId = g.Id
```

```
INNER JOIN [GroupType] AS gt on g.GroupTypeId = gt.Id
```

```
WHERE gm.PersonId = {{ Person.Id }} and gt.GroupTypePurposeValueId = 184 and gm.GroupMemberStatus = 1 and gm.IsArchived = 0
```

```
ORDER BY gm.CreatedDateTime
```

```
{% endsql %}
```

```
<h4>
```

```
{% for item in results %}
```

```
  {{ item.GTName }}: {{ item.Name }} <br>
```

```
{% endfor %}
```

```
</h4>
```

```
{% endif %}
```

Is is working???

- We launched the process four weeks ago at 3 of our 14 campuses
 - Plan is continue to test for another 4-6 weeks then evaluate expansion to all our campuses
 - Initial feedback as been very positive, campus leaders like the accountability, staff were surprised by the number of volunteers who hadn't served
 - Bonus: Finding data integrity issues!
 - May refine the connection opportunity to have more statuses, but so far so good
-

Questions?



Frank Grand

NewSpring Church, Technology Product Owner

frank.grand@newspring.cc

RocketChat: @frankgrand