



Participants— Engagement



Participants, Part 3 of 3

Disclaimer: Everyone's system will look different, and that's okay! If you see screenshots or demos in this webinar and aren't able to see the exact same thing in your system, that's expected.

- **Prepare:** Review the Participants—Prepare Webinar
- **Process:** Review the Participants—Data Entry & Processing Webinar
- **Pursue:** It's follow-up time!

Tracking Fields



- Contact Status 💡
 - *Is this person involved at all right now?*
- Participant/Member Type 🛠️
 - *How is this person participating in the life of your church?*
- Member Status 🏆
 - *Has this person officially joined our church?*
- Participant/Member Engagement 📷
 - *What does this person's participation look like in this season?*

Pro Tip: Review and update your COMMON Participation Type configuration setting.

Participant Engagement



- **Nightly** routine that updates the **Participant/Member Engagement** field on the **Participants/Members** page
- **Accurate, up-to-date, at-a-glance** way to determine how people are **participating**
- **Automated** so people can spend their time doing ministry, not data entry
 - Set up views
 - Create charts
 - Schedule notifications
 - Create processes

Set Yourself up for Success



- What type of **Group Participation** best reflects how people are involved in the life of your church?
- What type of **Event Participation** best reflects how people are involved in the life of your church?
- What type of **Giving** best reflects how people are involved in the life of your church?

*Pro Tip: Want to **omit** a Group/Event/Giving from consideration?
Set “Omit from Engagement” to **TRUE** on the Group Type, Event Type,
or Program record.*

Measuring Participant Engagement

Activity in the past 90 Days

- Event attendance
- Event registration
- Group Participation
- Leading a Group
- Serving in a Group
- Giving



Fully Engaged

- In a Small Group
- AND
- Serving OR Leading
- AND
- Individual Attendance OR Giving in the past 90 days



Partially Engaged

- In a Small Group
- OR
- Serving OR Leading
- OR
- Individual Attendance OR Giving in the past 90 days



Observing

- Some activity in the past 90 days but not enough for Fully or Partially Engaged
- This might be how show up when you add them to your system until they start moving one way or another
- Opportunity to
 - Increase engagement
 - Mitigate disengagement



Lapsing

- Contact Status of Active, Homebound, or Temporarily Away

BUT

- No individual activity for more than 90 days



Lapsed

- Contact Status of Inactive or Deceased
- OR
- No individual Activity for 180 days



WAIT TILL YOU SEE



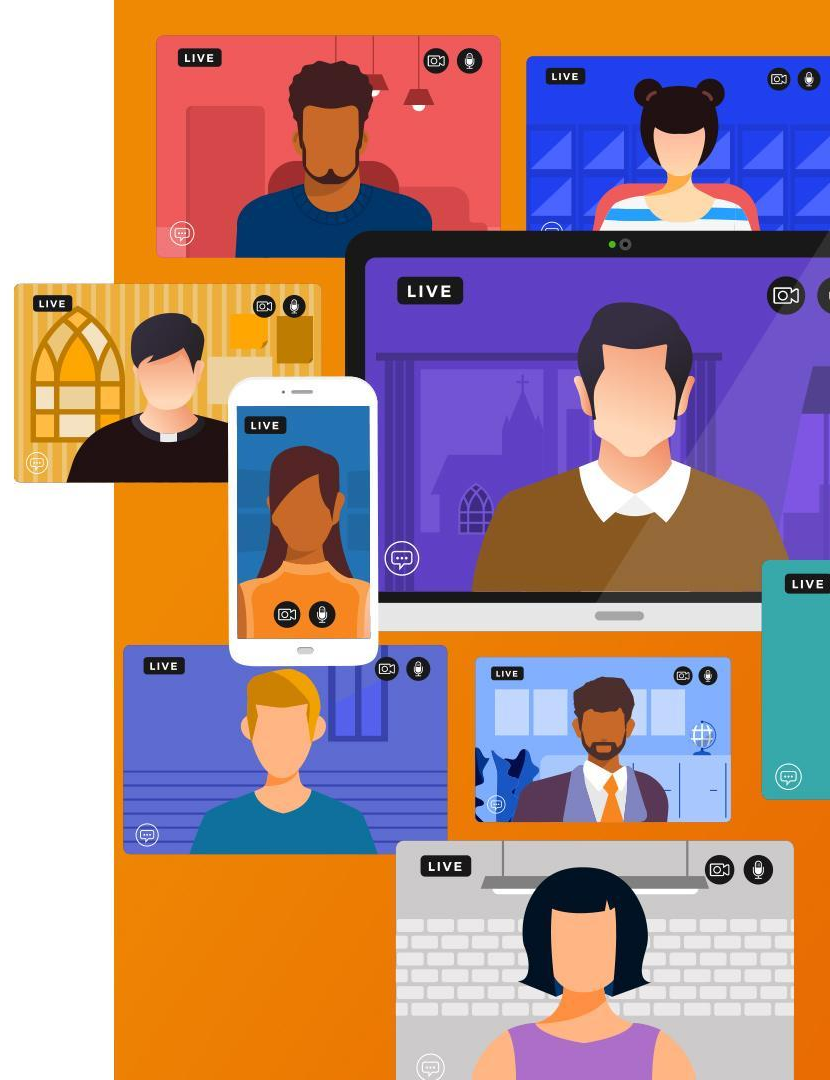
WHAT HAPPENS NEXT

makeameme.org

**Empower
Ministry
Leaders**

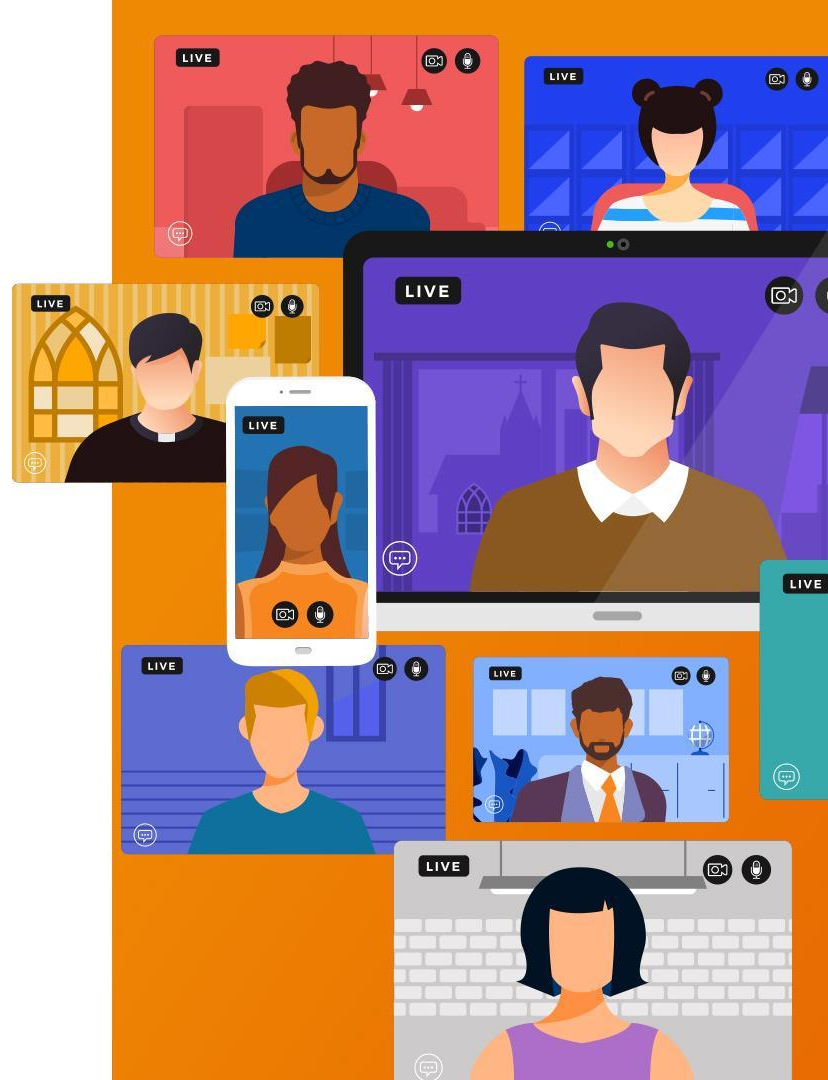
Views

- Watch the Front Door
- Watch the Back Door
- Pay attention to who is involved, but is not a member
- Pay attention to who is involved, but is not leading or serving
- Pay attention to who is involved, but isn't in a Small Group



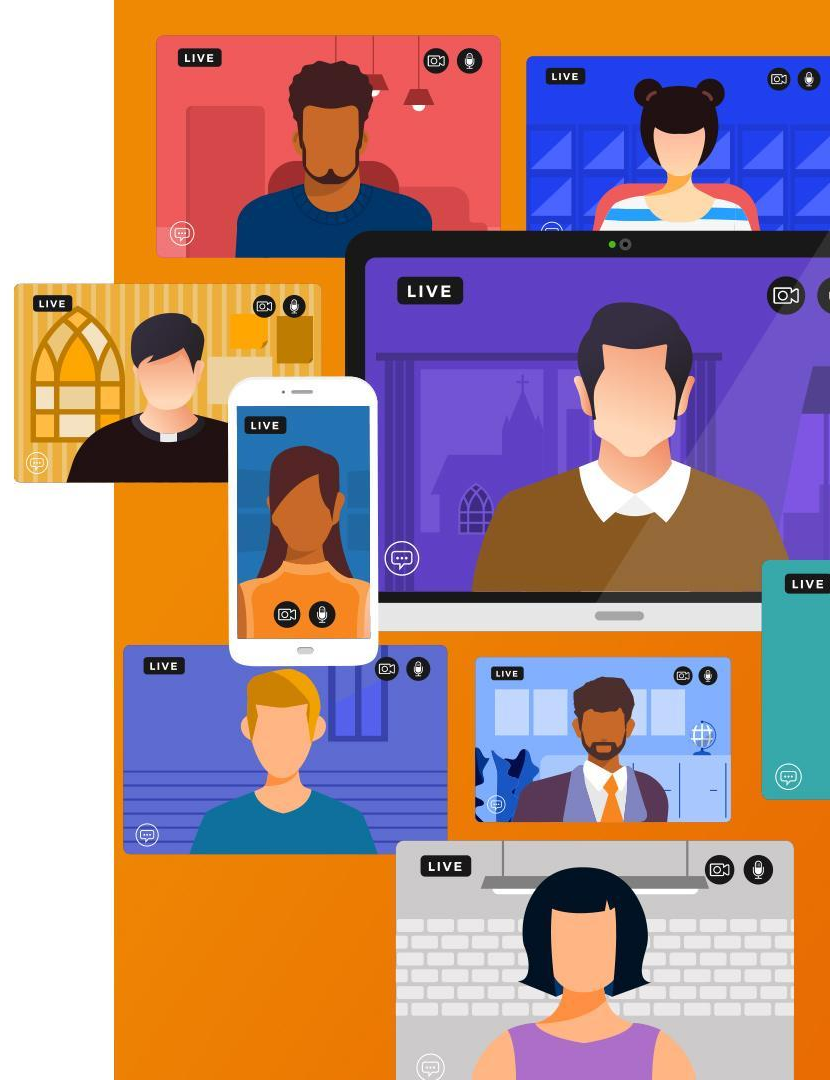
Notifications & Charts

- Create a Chart to go with your favorite views
- Curate a dashboard for each ministry leader
- Set up a notifications for changes in Participation status



Processes

- Newcomer/Assimilation Journey
- Membership Track
- Leadership Track
- Volunteer Onboarding



Connectons Pastor Conner



- Needs to Know ...
 - Who is showed up for the first time?
 - Who do we need to welcome?
- The MP Way ...
 - Added This Month view
 - Dashboard Chart
 - Notification
 - Assimilation Journey
 - Automated emails after each milestone is completed

Life Group Leader Landry



- Needs to Know ...
 - Who is involved, but not in a Life Group?
- The MP Way ...
 - Engaged Not in Group Life view
 - Dashboard Chart
 - Notification
 - Email Template Inviting to Join a Life Group
 - Assimilation Journey

Membership Manager Mason



- Needs to Know ...
 - What Participants are members?
 - How are members engaged in the life of the church?
 - Who is engaged with the church, but not a member?
- The MP Way ...
 - Engaged Not Member view
 - Members not Engaged view
 - Journeys
 - Dashboard Charts
 - Notifications
 - Email templates for quick communication

Volunteer Supervisor Vaughn



- Needs to Know ...
 - Who is engaged with the church, but not serving?
 - Who is ready to serve?
- The MP Way ...
 - In SG, Not Serving view
 - Volunteer Onboarding Journey view
 - Dashboard Charts
 - Notifications
 - Email templates for quick communication

View Title	Engaged Not in Group Life
Description	Shows Participants who are engaged but not in Group Life
Page	Participants
Field List	<pre>Contact_ID_Table.[Display_Name] AS [Display Name], Contact_ID_Table.[Email_Address] AS [Email Address], Contact_ID_Table.[Mobile_Phone] AS [Mobile Phone], Member_Status_ID_Table.[Member_Status] AS [Member Status], Participant_Engagement_ID_Table.[Engagement_Level] AS [Engagement Level], Participants.[__In_Group_Life] AS [In Group Life], Participants.[__Is_Serving] AS [Is Serving], Participants.[__Is_Leading] AS [Is Leading]</pre>
View Clause	<pre>Participant_Engagement_ID_Table.[Engagement_Level] LIKE '%Engaged%' AND Participants.[__In_Group_Life] = 0</pre>

View Title	Engaged Not Member
Description	Shows Participants who are engaged but are not yet members
Page	Participants
Field List	<pre> Contact_ID_Table.[Display_Name] AS [Display Name], Contact_ID_Table.[Email_Address] AS [Email Address], Contact_ID_Table.[Mobile_Phone] AS [Mobile Phone], Member_Status_ID_Table.[Member_Status] AS [Member Status], Participant_Engagement_ID_Table.[Engagement_Level] AS [Engagement Level], Participants.[__In_Group_Life] AS [In Group Life], Participants.[__Is_Serving] AS [Is Serving], Participants.[__Is_Leading] AS [Is Leading] </pre>
View Clause	<pre> Member_Status_ID_Table.[Member_Status] IS NULL AND Participant_Engagement_ID_Table.[Engagement_Level] LIKE '%Engaged%' </pre>

View Title	Participant Type Changes - Last 90 Days
Description	Shows Participants whose Participant Type has changed in the past 90 days
Page	Participants
Field List	<pre> Contact_ID_Table.[Display_Name] AS [Display Name], Contact_ID_Table.Contact_Status_ID_Table.[Contact_Status] AS [Contact Status], Participant_Type_ID_Table.[Participant_Type] AS [Current Participant Type] , (SELECT TOP 1 Previous_Value from dp_Audit_Detail AD JOIN dp_Audit_Log AL ON AD.Audit_Item_ID = AL.Audit_Item_ID WHERE AL.Table_Name = 'Participants' AND AL.Record_ID = Participants.Participant_ID AND AD.Field_Name = 'Participant_Type_ID' ORDER BY Date_Time DESC) AS [Previous Type] , (SELECT TOP 1 New_Value from dp_Audit_Detail AD JOIN dp_Audit_Log AL ON AD.Audit_Item_ID = AL.Audit_Item_ID WHERE AL.Table_Name = 'Participants' AND AL.Record_ID = Participants.Participant_ID AND AD.Field_Name = 'Participant_Type_ID' ORDER BY Date_Time DESC) AS [Changed To] , (SELECT TOP 1 User_Name FROM dp_Audit_Log AL JOIN dp_Audit_Detail AD ON AL.Audit_Item_ID = AD.Audit_Item_ID WHERE AL.Table_Name = 'Participants' AND AL.Record_ID = Participants.Participant_ID AND AD.Field_Name = 'Participant_Type_ID' ORDER BY Date_Time DESC) AS [Changed By] , (SELECT TOP 1 On_Behalf_Of_User_Name FROM dp_Audit_Log AL JOIN dp_Audit_Detail AD ON AL.Audit_Item_ID = AD.Audit_Item_ID WHERE AL.Table_Name = 'Participants' AND AL.Record_ID = Participants.Participant_ID AND AD.Field_Name = 'Participant_Type_ID' ORDER BY Date_Time DESC) AS [Change By (If APIUser)] , (SELECT TOP 1 Date_Time FROM dp_Audit_Log AL JOIN dp_Audit_Detail AD ON AL.Audit_Item_ID = AD.Audit_Item_ID WHERE AL.Table_Name = 'Participants' AND AL.Record_ID = Participants.Participant_ID AND AD.Field_Name = 'Participant_Type_ID' ORDER BY Date_Time DESC) AS [Date Changed] </pre>
View Clause	<pre> (SELECT TOP 1 Date_Time FROM dp_Audit_Log AL JOIN dp_Audit_Detail AD ON AL.Audit_Item_ID = AD.Audit_Item_ID WHERE AL.Table_Name = 'Participants' AND AL.Record_ID = Participants.Participant_ID AND AD.Field_Name = 'Participant_Type_ID' ORDER BY Date_Time DESC) >= dp_DomainTime - 90 </pre>

View Title	Not Present > 30 Days
Description	Shows Participants who have not been present for 30 days
Page	Participants
Field List	<pre>Contact_ID_Table.[Last_Name] AS [Last Name], Contact_ID_Table.[Nickname] AS [Nickname], Contact_ID_Table_Contact_Status_ID_Table.[Contact_Status] AS [Contact Status], Participant_Type_ID_Table.[Participant_Type] AS [Participant Type], Participants.[_First_Attendance_Ever] AS [First Attendance Ever], Participants.[_Second_Attendance_Ever] AS [Second Attendance Ever], Participants.[_Third_Attendance_Ever] AS [Third Attendance Ever], Participants.[_Last_Attendance_Ever] AS [Last Attendance Ever]</pre>
View Clause	<pre>Participants.[_Last_Attendance_Ever] < dp_DomainTime - 30 AND Contact_ID_Table_Contact_Status_ID_Table.[Contact_Status_ID] = 1</pre>

View Title	Assimilation Journey
Description	Shows where Participants are on their Assimilation Journey
Page	Participants
Field List	<pre> Contact_ID_Table.[Display_Name] AS [Display Name] , Contact_ID_Table.[Nickname] AS [Nickname] , Contact_ID_Table.[_Age] AS [Age] ,(SELECT TOP 1 Date_Accomplished FROM Participant_Milestones PM WHERE PM.Milestone_ID = 87 AND PM.Participant_ID = Participants.Participant_ID ORDER BY Date_Accomplished DESC) AS Planned ,(SELECT TOP 1 Date_Accomplished FROM Participant_Milestones PM WHERE PM.Milestone_ID = 3 AND PM.Participant_ID = Participants.Participant_ID ORDER BY Date_Accomplished DESC) AS First_Visit ,(SELECT TOP 1 Date_Accomplished FROM Participant_Milestones PM WHERE PM.Milestone_ID = 2 AND PM.Participant_ID = Participants.Participant_ID ORDER BY Date_Accomplished DESC) AS Second_Visit ,(SELECT TOP 1 Date_Accomplished FROM Participant_Milestones PM WHERE PM.Milestone_ID = 1 AND PM.Participant_ID = Participants.Participant_ID ORDER BY Date_Accomplished DESC) AS Orientation ,(SELECT TOP 1 Date_Accomplished FROM Participant_Milestones PM WHERE PM.Milestone_ID = 4 AND PM.Participant_ID = Participants.Participant_ID ORDER BY Date_Accomplished DESC) AS Join_A_Team ,(SELECT TOP 1 Date_Accomplished FROM Participant_Milestones PM WHERE PM.Milestone_ID = 5 AND PM.Participant_ID = Participants.Participant_ID ORDER BY Date_Accomplished DESC) AS Join_A_Group </pre>
View Clause	<pre> EXISTS (SELECT 1 FROM Participant_Milestones PM WHERE PM.Milestone_ID = 3 AND PM.Participant_ID = Participants.[Participant_ID]) </pre>

View Title	Volunteer Onboarding
Description	Shows where Participants in the Volunteer Onboarding Process
Page	Participants
Field List	<pre> Contact_ID_Table.[Display_Name] AS [Display Name] , Contact_ID_Table.[Nickname] AS [Nickname] , Contact_ID_Table.[_Age] AS [Age] ,(SELECT TOP 1 Date_Accomplished FROM Participant_Milestones PM WHERE PM.Milestone_ID = 20 AND PM.Participant_ID = Participants.Participant_ID ORDER BY Date_Accomplished DESC) AS Application ,(SELECT TOP 1 Date_Accomplished FROM Participant_Milestones PM WHERE PM.Milestone_ID = 21 AND PM.Participant_ID = Participants.Participant_ID ORDER BY Date_Accomplished DESC) AS BG_Check ,(SELECT TOP 1 Date_Accomplished FROM Participant_Milestones PM WHERE PM.Milestone_ID = 22 AND PM.Participant_ID = Participants.Participant_ID ORDER BY Date_Accomplished DESC) AS Refs ,(SELECT TOP 1 Date_Accomplished FROM Participant_Milestones PM WHERE PM.Milestone_ID = 23 AND PM.Participant_ID = Participants.Participant_ID ORDER BY Date_Accomplished DESC) AS Training </pre>
View Clause	<pre> EXISTS (SELECT 1 FROM Participant_Milestones PM WHERE PM.Milestone_ID = 20 AND PM.Participant_ID = Participants.[Participant_ID]) </pre>