PATH
An engagement software

Recommended Uses

The purpose of this document is to assist you to begin implementing PATH into your regular work routines. As you begin reaching our to individuals, remember the Shepherding Tips and Ideas document provided for how to begin and navigate shepherding conversations.

The following are recommended uses of PATH:

KIDS AND STUDENT MINISTRY

<u>Weekly</u>

In the Engagement module:

- On the Downward Trend report, identify and reach out to the families of kids and students who have a Downward Trend arrow especially if they have an EI of 3. Conversations with individuals who have an EI of 3 with a Downward Trend Arrow tend to have the most fruitful outcomes. Text or call a parent or the student to check on them.
- On the Absentee report, identify families who have been absent 3+ consecutive weeks and reach out to them. Help them come up with a plan to get back to regular attendance.

<u>Monthly</u>

In the Engagement module on the Engagement report:

- Identify families whose kids or students are increasing their EI due to Attendance of Groups (moving from a 1 to 2 or 2 to 3). Invite a parent to coffee to create a space for them to ask questions and learn more about your church. Encourage them to take next steps and support them as they do so.
- Celebrate the commitment of families who have a kid or student with an EI of 4 or 5. Send a text message or post card thanking these families for their high level of engagement.

GROUPS

<u>Weekly</u>

In the Engagement module:

- On the Downward Trend report, identify and reach out to individuals who have a Downward Trend arrow especially if they have an Group Indicator number of 3. Conversations with individuals who have a level 3 engagement with a Downward Trend Arrow tend to have the most fruitful outcomes. Text or call the individual to check on them.

- On the Absentee report, identify individuals who have been absent 3+ consecutive weeks and reach out to them. Help them come up with a plan to get back to regular attendance.

Monthly
In the Attendance module on the Group or Volunteer Teams report:
- Analyze the percent attended of individuals in a few groups. This report can be a starting point for a coaching conversation with the group leader. Perhaps the individuals with low attendance need encouraged or connected to a new group.

Periodically
In the Engagement module on the Engagement report:
- Identify group attendees who have an Engagement Index of 4 or 5 to create a list of potential group leader candidates.

VOLUNTEERS
Weekly
In the Engagement module:
- On the Downward Trend report, identify and reach out to individuals who have a Downward Trend arrow especially if they have an Volunteer Indicator number of 3. Conversations with individuals who have a level 3 engagement with a Downward Trend Arrow tend to have the most fruitful outcomes. Text or call the individual to check on them.
- On the Absentee report, identify individuals who have been absent 4+ consecutive weeks and reach out to them. Help them come up with a plan to get back to regular volunteering.

Periodically
In the Engagement module on the Engagement report:
- Evaluate the engagement level of different teams and how those particular teams are impacting overall discipleship. Does one of your teams have several individuals with high EIs? What might that team leader be doing differently than the others to encourage engagement?

MEMBERSHIP
Periodically
In the Engagement module on the Engagement report:
- Filter the report to show only your members. Identify committed members who do not have the engagement level you would expect, check in on and shepherd them towards the higher levels of involvement they have committed to as a member. Begin accountability conversations as appropriate.
- Filter the report by selecting all adult Individual Types except members. Identify attendees with high levels of engagement that aren't yet members and invite them to your membership class.

FINANCE
Weekly
In the Finance module:
- On the New Givers report, identify and celebrate those who are giving for the 1st, 2nd and 3 time. Use these touch points to thank individuals for their generosity, build trust and be transparent about how their gifts are being used.

Monthly
In the Finance module:
- On the Lapsed Givers report, identify lapsed givers and call to check on them. Remember! They may have had a significant life change that your church can support them through. If you learn a care opportunity doesn't exist, disciple the individual appropriately about the importance of the obedience of giving.

OTHER USES
Weekly
In the Engagement module:
- In a weekly or bi-weekly staff meeting, review the Absentee report and Downward Trend report and discuss the missing people to make sure someone on staff is aware of their situation and assign follow up to staff as needed.

Periodically
In the Engagement module:
- On the Movement report, keep an eye on people who decrease from a 4 to a 3 and a 3 to a 2. It's a good idea for someone on staff to do this occasionally even if you're keeping up with the previous recommended uses.
- On the Movement report, identify people who quickly increased their engagement from a 0 to a 2 and encourage them to continue taking next steps.