Outreach Connect

A Product of CAA Software, Inc.

Outreach Connect System Overview Manual

Church Growth Strategies Involving Members, Guests, & Prospects

Sunday School, Care Group, & Outreach Ministries

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System Overview – Outreach Connect

Concepts

Outreach Connect is a web-based tool for church staff, leaders, and ministry volunteers to use in managing contacts with people and groups of people. The groups typically include church members, guests, or prospects. You may form groups for almost any purpose—for example Sunday School care groups or Deacon visitation assignment groups. In some cases, a group could even be a collection of churches, ministries, or businesses as well as individuals.

In ***Outreach Connect***, “prospect” is a term used to mean any person who has never visited your church (or class or group, etc.). Prospects are people you want to reach out to and invite to attend your worship service, your Sunday School class, or your ministry event. You may have to stay in contact with them and follow up with them several times to get them to attend.

In ***Outreach Connect***, “guest” is a term used to mean someone who has visited in your church or group or has attended one of your ministry events at least once—but they have not joined or become members yet. Although they are non-members, guests may be regular attenders. They may be members of your Sunday School class while still considered guests (non-members) of your church.

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Your church can use ***Outreach Connect*** to remain in regular or periodic contact with members, guests, and prospects and keep track of the contact history. This tool aids the local church with organizing people into groups of manageable sizes—care groups, for example—and in performing a variety of follow-up or outreach needs.

Outreach Connect is a convenient tool for churches to make available to their leadership, their outreach teams, and their ministry teams. The tool assists leaders in the coordination and exchange of information between Sunday School classes, care groups, prospects and outreach needs, visitation assignments, and more.

One of the chief advantages of using ***Outreach Connect*** is that it helps church leaders to establish accountability. Staff and outreach leaders can monitor the system to ensure those assigned or volunteering are making their contacts and recording the results. Leaders can monitor the progress of the outreach team or care group leaders and view the results of the conversations or visits they had with the people they contacted.

With ***Outreach Connect***, you build an online, Internet-accessible database of people to contact and a history of follow-up results. Some contacts may be members, some may be guests, and some may be prospects. These entries are "Contact Records" in database terminology.

Churches use Contact Records to manage and track the outreach and follow-up needs with people such as those shown in the following list:

- prospects—people that have not yet visited your church
- first-time guests and repeat visitors
- members of groups such as Sunday School classes
- Sunday School class care groups—segments of a class—each with an outreach and/or care group leader
- prospects for—or members of—choirs, RA's, GA's, AWANA, men's ministry, women's ministry, youth ministry, and other ministries

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- deacon family ministry assignments or deacon and staff visitation programs
- homebound and senior adult outreach and care ministries
- hospital and nursing home visitation
- any other groupings of people that it would be helpful to contact, keep track of their needs, and the keep a history of the contact results

Follow-up with prospects, guests, or members may occur in a variety of ways. These include by telephone, by card or letter, by e-mail message, by text message, by personal visit to their residence, or by any other means that appropriately meets your needs and the needs of your church.

After a contact has been made by your outreach team member, the results—comments and feedback, prayer requests, important family data, family news, special instructions, follow-up recommendations, etc.—are entered and tracked online. Churches may maintain the history for months or years if desired.

You may define “sources” of prospects as category groups and track them in any way useful to your church. Some examples of sources might be as follows:

- newcomer lists
- Sunday service walk-in guests and visitor cards
- home Small Group or Block Party attendance records
- special church events such as:
    - VBS
    - Fall Festival
    - Nursery or Preschool Open House
    - Holiday Musical, Cantata, or Pageant
    - Wild Game Dinner

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Governance

The ***Outreach Connect*** system is comprised primarily of a user/worker or "Outreach Team" module and an Administrative module. Three informational or instructional manuals have been prepared for your use in learning how to use the system.

- This ***System Overview Manual*** is for everyone: those who use either the Administrative module or the Outreach Team module.
- The ***Administrator Operations Manual*** is available for those who have administrative permissions and use the Administrative module.
- The ***Outreach Team Operations Manual*** is available for those who have assistant administrator or regular user permissions and use the Outreach Team module.

Governance of setup, control, and administration occurs in the Administrative module. A church typically will have one or two people designated as Administrators. However, anyone can logon and perform administrative functions if granted the appropriate permission settings. There is no limit on how many people may have permissions to act as an ***Outreach Connect*** system Administrator.

Churches normally designate "Team Leader" permissions (Assistant Administrator) to staff and volunteers who will be functioning as outreach leaders, class and care group leaders, and others assisting in using the system to coordinate groups. Team Leaders have special privileges in the Outreach Team module but cannot logon to the Administrative module.

Those workers who use the system only for getting their contact assignments and recording results have "Team Member" permissions. Most of your outreach volunteers will be Team Members (regular users). However, like Team Leaders and Team Members, Administrators may also logon to the Outreach Team module to make contacts and record results.

Some examples and illustrations provided in these manuals are from actual churches using ***Outreach Connect***. CAA wanted to make these manuals as helpful and practical as possible. Contact CAA to learn some of the creative ways other churches have found success using ***Outreach Connect***.

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Terminology

The naming conventions shown in this chart will apply throughout all the manuals:

Term	Meaning
Outreach Connect	***Outreach Connect*** is an Internet-based system of modules and databases used in managing contacts (members, guests, & prospects), workers, and groups of workers and contacts. Workers may be church staff, leaders, volunteers, etc. This system may be used to manage member and guest care groups, Sunday School or Discipleship classes, Small Groups, prospect outreach, staff and deacon visitation, etc.
Outreach Team Module	The Outreach Team module is accessible to all outreach workers. These workers are Administrators, Team Leaders, and Team Members. **Check-Out** and **Check-In** of Contact Records are performed in the Outreach Team module.
Administrative Module	The Administrative module is accessible only to Administrators. The Administrative module is used to setup and maintain Team Records and Contact Records. Team Records are the workers who make contacts, while Contact Records are those people you contact. The Administrative module is the basic control module and includes the setup of Team groups, Contact groups, e-mail communications, etc.
Team Member	A Team Member is worker authorized to use your church's ***Outreach Connect*** system, but does not have "Administrator" or "Assistant Administrator" permission settings. "Regular User" permission settings are the lowest level of system access. This outreach worker uses the Outreach Team module to identify available contacts, and after making the contacts, to record the results.
Team Leader	A Team Leader is anyone given "Assistant Administrator" permission settings. This outreach worker has the same permissions with the Outreach Team module as Team Members, plus the additional ability to construct/save custom searches and use the reporting functions.
Administrator	An Administrator is anyone granted "Administrator" permission settings. This outreach worker may logon to the Administrative module and perform system control functions. The Administrator may also logon to the Outreach Team module to interact and make contacts in the same manner as a Team Leader or Team Member.

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Prospect	A prospect is someone who has never visited your church, class, or group, or attended one of your church ministry events—but lives geographically within your church's local community or sphere of influence. Prospects are people you want to reach out to and invite to attend your worship service, Sunday School class, or ministry event, etc. One of your goals is to turn "prospects" into "guests."
Guest	A guest is someone who has visited in your church or group, or has attended one of your ministry events at least once. A guest is not yet a member. When they attend, even if it is the first time, you can start to get to know them and build relationships with them. One of your goals is to turn guests into regular attenders so that you can minister to them and disciple them.
CAA	CAA is a short abbreviation for CAA Software, Inc., owners of CAA Ministries, ***Outreach Connect*** and other CAA products: • ***Direct Communicator*** helps churches communicate with members, guests, and prospects via a single integrated tool in ways such as web page, e-mail, texting, phone-tree messages, online giving, and an online contact directory that includes member photos. • ***Sundial CEF*** is an online web calendar program that also includes such powerful features as facility scheduling, equipment scheduling, event registration, and online payment processing. • ***Prayer & Harvest Campaign*** is a special solution that provides the church with up to 2,500 household contacts in their community and includes training and support for reaching the unchurched and the lost through a prayer and invitation ministry. ***Prayer & Harvest*** includes use of the ***Outreach Connect*** system at no extra cost. • ***Church Member Link*** is a church growth strategy and suite of tools for building your church and expanding ministry through becoming a Great Commission-driven church utilizing Sunday School or Small Groups for evangelism, discipleship, fellowship, and ministry. With ***Eagle-Wings***, CAA becomes your consulting partner to assist you in church growth. Visit ***www.ChurchMemberLink.com*** to see more!

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Advantages of Outreach Connect

Outreach Connect is an ideal tool for outreach leadership at your church. It helps leaders create and maintain lists of available workers who will make contacts. The church can develop an easily accessible database of members, guests, and prospects to contact. The Administrator can arrange workers into groups and use the system for quickly e-mailing them, texting them, or phoning them. ***Outreach Connect*** takes advantage of the Internet to help leadership keep Team Leaders and Team Members informed of outreach opportunities and needs, no matter where the workers are—at home, at school, at work, at church, or even while traveling around the state or nation!

Outreach Connect enables leadership to quickly and easily update or adjust the Contact Records in the database and thus keep the outreach emphasis fresh and current. Although Administrators set up the worker records, the outreach workers may update their own profiles to assist in keeping their own contact information current.

Administrators also create and maintain group lists to control distribution of messages for targeting specific Team (outreach worker) Records (Team Leaders, Team Members—deacons, for example) or specific Contacts Records (class members, contact groups—members and prospects, for example) when an outreach need is urgent.

Outreach Connect has privacy features that members, guests, and prospects will really appreciate. Unlike some web-based applications, Administrators, Team Leaders, and Team Members connect without any annoying popups or unwanted advertising. There are no private “chat rooms” that have been known to complicate family relationships. There are no addictive games or social connections that rob your time.

Just as importantly, there are no “strangers” using ***Outreach Connect***. Outsiders without a Username and Password cannot gain access to your church outreach data to steel identities or attempt to “become friends” with church members and their children.

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Special Features

Here are a few more features of the ***Outreach Connect*** system from CAA Ministries that your church will appreciate:

- Administrators can send e-mail messages to Team Leaders and Team Members from within the system. Administrators do not have to use a separate e-mail system, saving time while they are busy reviewing or updating outreach contacts.
- Administrators can send text messages to Team Leaders and Team Members from within the system. Administrators can create a message and toggle between e-mail and texting and can send the same message either way. They do not have to use a separate texting method, saving time while they are busy reviewing or updating outreach contacts. This feature makes it easy to accommodate outreach workers who prefer to receive text messages instead of e-mail messages.
- Team Leaders and Team Members may maintain their own contact profiles. They control their own username and password settings and keep their e-mail addresses and telephone numbers current. To receive text messages, either the Administrator or the workers need to put in their cell phone number and choose their mobile provider from the pick-list. The system needs to know the provider, for example T-Mobile or Verizon, so that the system can send the text message with correct protocol coding to the outreach workers’ cell phones.
- Team Leaders and Team Members can print road maps and driving instructions from within the system. This saves time when reviewing available outreach needs. Workers select a contact, and if an in-home visit is appropriate, they can look at a road map immediately—and print it if needed.
- ***Outreach Connect*** is entirely Internet-based—there is no need for your church to have its own IT professionals or to maintain servers, websites and databases. There is no software to install on church computers, or on Administrator, Team Leader, or Team Member family personal computers or laptops.

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- If you choose, your church does not need to have an "outreach" night or a special time for doing outreach activities. Leaders and outreach workers do not have to assemble at the church before going on home visits, visits to nursing homes, etc. Outreach leaders manage the entire process over the Internet, and Team Leaders and Team Members conveniently get their assignments and report their results over the Internet using ***Outreach Connect***.

  Administrators logon from home, office, church, or even while traveling. They can review the status of outreach needs or care groups, make updates, and notify outreach workers via e-mail or text message if the need is urgent.

  Team Leaders and Team Members may logon from wherever they have Internet access: home, school, office, etc. They simply and quickly review available assignments presented to them, take one (called performing the "**Check-Out**" function), make the contact or visit, and then enter the results (called performing the "**Check-In**" function).

  Once an assignment is accepted, the status of that Contact Record changes from "**Available**" to "**Checked-Out**." No other outreach worker can select that assignment.

  Later, after the contact (visit, telephone call, etc.) is completed, the "**Check-In**" function is performed by that outreach worker and the Contact Record status will change to "**Complete**." Administrators will periodically scan for "**Complete**" Contact Records to learn what progress has been made and what needs have been expressed by those contacted. When it comes time for another contact to be made, the Administrators will reset the Contact Record to "**Available**" so that the outreach workers will make another contact.

  Only those Contact Records with a status of "**Available**" need an outreach worker to take the assignment.

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System Documentation

Some examples and illustrations provided in these manuals are from actual churches using ***Outreach Connect***. Your partners at **CAA** wanted to make these manuals as helpful and practical as possible.

System Overview

This ***System Overview Manual*** is for everyone: those who use either the Administrative module or the Outreach Team module. It provides background information about the concepts, features, and security built into ***Outreach Connect***.

Administrator Operations

The ***Administrator Operations Manual*** is available for those who have Administrator permissions and logon to the Administrative module. Those who logon to the Administrative Module should read this manual carefully.

Outreach Team Operations

The ***Outreach Team Operations Manual*** is available for those who have all permissions—Administrator, Assistant Administrator (Team Leader), & Regular User (Team Member). All registered Members may logon to the Outreach Team module and should review this manual carefully.

Configuration & Start-Up Guide

The ***Configuration & Start-Up Guide*** provides the customization data for your church's specific installation. It also contains:

- Illustrations of how to login to the Administrator module
- Illustrations of how to login to the Outreach Team module
- Illustrations of the Master Configuration settings

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