



ACS People Suite – Church Growth Tools



- Church Growth Tools..... 4
- Church Growth Tools Overview 4
 - Basic Church Growth Tool Steps 5
 - Accessing Church Growth Tools 5
- Working with the Assignment Form 5
 - Setting up the Assignment Form 5
 - Filtering the Assignment Form by Attendance Group 5
 - Including Comments on the Assignment Form..... 6
 - Including Special Fields on the Assignment Form..... 6
 - Previewing the Assignment Form 6
 - Printing the Assignment Form 7
 - Saving an Assignment Form..... 7
- Working with the Note Writer 7
 - Creating a Letter in Note Writer 8
 - Previewing a Note Writer Letter..... 8
 - Printing a Note Writer Letter 8
 - Saving a Note Writer Letter 9
- Working with the RISK SOS Report 9
 - Statistical Analysis 9
 - Setting up the RISK SOS Report 10
 - Selecting RISK SOS Options..... 10
 - Setting RISK SOS Filters..... 10
 - Previewing the RISK SOS Report 11
 - Printing the RISK SOS Report 11
 - Saving the RISK SOS Report 11
 - Creating a RISK SOS Graph..... 11
 - Saving a RISK SOS Graph as an Image 12
- Working with RISK SOS Automation 13
 - Setting up the RISK SOS Automation 13
 - Adding an Automation Action 13
 - Editing an Automation Action 14

Running RISK SOS Automation	14
Saving a RISK SOS Automation	14

Church Growth Tools

Church Growth Tools works in conjunction with the People, Attendance, and Connections modules to identify those whose attendance is slipping, ongoing, or soaring. Having this information allows you to implement appropriate responses for each situation. It's important to understand what each report does and how to use them.

- Church Growth Tools Overview
- Basic Church Growth Tool Steps
- Accessing Church Growth Tools
- Working with the Assignment Form
- Working with the Note Writer
- Working with the RISK SOS Report
- Working with RISK SOS Automation

Church Growth Tools Overview

Church Growth Tools is a set of analytical tools that you can use to track attendance trends and implement appropriate connection and recognition programs. These tools are based on information entered into the People, Connections, and Attendance modules.

The idea behind the tools is that one of the most effective ways to grow the church is to minister more successfully to existing church members. The goal is for them to grow and participate, rather than have attendance lapses or no longer attend. Church Growth Tools provides a way to discover those who are regular attenders, those who attend occasionally or are sliding in their attendance, and those who are non-attenders. With this information, you can set up a program to minister to each group of people.

Church Growth Tools includes the following reports:

- The **Assignment Form** is a full-page Connections form. You can use this form to create outreach opportunities. This form can include family information, attendance information, individual or family pictures, details of prior contacts, and a response section for feedback.
- **Note Writer** is a simple mail merge program you can use to send letters to your members. These can be congratulatory or "We missed you" letters to send to various members of your church based on RISK/SOS results.
- The **RISK/SOS** report tracks attendance over two consecutive time periods, such as two quarters. This report identifies whether a member is a Regular, Irregular, Sporadic, or Non-Attender. It also determines if their attendance is better than (Soaring), the same as (Ongoing), or worse than (Sliding) the previous period.
- **RISK/SOS Automation** ties everything together. You can set up letters in Note Writer and Assignment Forms to use based on the results found when you run the RISK/SOS report. You can then enter parameters in RISK/SOS Automation and automatically perform certain tasks. For example, you can print a Letter of Recognition to those with Soaring attendance or set up a contact for those with Sliding attendance.


Basic Church Growth Tool Steps

Basic steps for using Church Growth Tools are:

1. Set up the RISK/SOS report to identify those who are Regular, Irregular, Sporadic, or Non-Attendees, and those who are Soaring, Ongoing, or Sliding. You determine the criteria for each scale.
2. Run the RISK/SOS report. Names display with their RISK and SOS assessments.
3. Create Assignment Forms and letters in the Note Writer to use in contacting individuals in the various RISK and SOS groups.
4. Enter Automation Actions in the RISK/SOS Automation report to automatically print forms or letters.

Accessing Church Growth Tools

Unlike other ACS modules, all Church Growth Tools options are located in People Suite Reports.

1. Under Searches and Reports, click the **Reports** tab.
2. Select **Church Growth Tools Reports** from the drop-down list.
3. Click **Go** .

Working with the Assignment Form


The Assignment Form is an 8-½" X 11" form on which you can print connections/outreach assignments. Give the Assignment Form to individuals making contacts based on the RISK/SOS results.

This form is similar to the Assignment Form in the Connections module with some additional features. These additional features are:

- Group by attendance class,
- Print each family member's attendance information on one form, and
- Print family pictures.





Setting up the Assignment Form

The Assignment Form is a report that you can give to a contact team or individual that shares information about an individual or individuals in a family. Typically you'd use this form after you've run the RISK/SOS report and determined who to contact. You can customize much of what displays on the form.

1. From Searches and Reports, click the **Reports** tab.
2. Select **Church Growth Tools Reports** from the drop-down and click **Go** .
3. Under **Cards**, select **Assignment Form**.
4. Click **Customize**.
5. On the **Reports** tab, select the options you want to include on the form.
6. Click **Close**.

Filtering the Assignment Form by Attendance Group

You can filter the Assignment Form by Attendance group. This allows you to target specific groups of people such as those enrolled in Bible Study.

1. In the ACS Reports window, select **Church Growth Tools** from the drop-down list.
2. From **Cards**, select **Assignment Form**.
3. Click **Customize**.
4. Click **Additional Options**.
5. Click **AT Group**.
6. In the AT Group list, select the attendance group you want to include.
7. Click **Add** . You can click **Add All**  to select all Attendance Groups and **Remove**  to deselect an attendance group. You can click **Remove All**  to deselect all Attendance Groups.
8. Click **Close**.


Including Comments on the Assignment Form

There are times when it is helpful to have individual or family comments, found on the **View/Edit Individual Comments** tab, print on the Assignment Form. Depending upon your selected report settings, you can choose up to four Comment Types to include on the Assignment Form.

1. In the ACS Reports window, select **Church Growth Tools** from the drop-down list.
2. Select **Cards>Assignment Form** and click **Customize**.
3. Click **Additional Options**.
4. Select **Print Comment Section** and click **Select**.
5. From the Comments list, select the desired field and click **Add** . You may select up to four comment types. To de-select a field, click **Remove** .
6. Click **Close** to accept your selections.
7. Select **Family Comments** to include family comments on the Assignment Form.
8. Click **Close**.


Including Special Fields on the Assignment Form

You can select up to eight special fields to include on the **Assignment Form**. These are fields that, by default, aren't included on the form, but are important to you. For example, you might want to include the **Date Last Attended** as well as the family deacon.

1. In the ACS Reports window, select **Church Growth Tools** from the drop-down list.
2. Select **Cards>Assignment Form** and click **Customize**.
3. Select **Special Fields** and click **Select**.
4. From the **Fields** list, select the desired field and click **Add** . You may select up to eight fields. If you want to change the field name that displays on the form, edit the name in the Description box.
To de-select a field, click **Remove** .
5. Click **Close**.



Previewing the Assignment Form

The Assignment Form options you choose affect the appearance and content in the form. Previewing the form can help you make sure you include all needed information and that the format is what you want before you print the forms to distribute.

1. From Searches and Reports, click the **Reports** tab.
2. Select **Church Growth Tools Reports** from the drop-down and click **Go** .
3. Under **Cards**, select **Assignment Form**.
4. Click **Customize**.
5. On the **Report Options**, select the options you want to include on the form.
6. Click **Preview**. The Assignment Forms display. Review the format and appearance to make sure the content is what you want.

Printing the Assignment Form

Once you are happy with the form format, you are ready to print.

1. From Searches and Reports, click the **Reports** tab.
2. Select **Church Growth Tools Reports** from the drop-down and click **Go** .
3. Under **Cards**, select **Assignment Form**.
4. Click **Customize**.
5. On the **Report Options** tab, set up the form.
6. Click **Preview**.
7. Click **Print** .

Saving an Assignment Form

You can save the options you choose to use in the Assignment Form so you can use the same form format in the future. You can create multiple forms and save each so make sure to give each one a name that easily identifies it.

1. After setting up the **Assignment Form**, click **Close**.
2. In the Save Report dialog box, enter a new, descriptive name for the report.
3. To make the form public, select **Public Report**. If you do not select the option, only you can see this version.
4. You can enter a description to describe the form.
5. Click **Save**.

Working with the Note Writer

Church Growth Tools includes Note Writer which you can use to create simple mail merges.



Note Writer is not a full-feature word processor such as Microsoft Word®, but it does contain standard formatting tools such as bold and underline. You can also personalize each letter by including database fields in the letter's body.

Note Writer is useful for sending letters based on RISK/SOS results. For example, you may want to send a congratulatory letter to all of your members who have increased their attendance over the last quarter.

You are not limited to using Note Writer with Church Growth Tools only. You can create a merge letter and print it for those individuals who meet your search criteria. For example, you may want to send a quick reminder to your Building Committee about an upcoming meeting. You may find this easier to do in Note Writer than using the standard mail merge feature with a word processor.

Creating a Letter in Note Writer


It is generally much easier to create a letter in Note Writer than the standard word processing program. Note Writer options are very similar to those in other word processing programs but there may be some you are not familiar with. For information on some fields, see the **Additional Fields** section below.

1. From Searches and Reports, click the **Reports** tab.
2. From the drop-down list, click **Church Growth Tools Reports** and click **Go** .
3. From the expandable list on the upper sidebar, select **Lists>Note Writer**.
4. Click **Customize**.
5. Under **Report Options**, make the appropriate option choices.
6. Click **Compose Letter**.
7. Enter the body of your letter.
8. When you are finished composing the letter, click  to close the window.

If you do not print immediately after creating the letter, and want to print it at a later date, be sure to **Save**.



Previewing a Note Writer Letter

The Note Writer options you choose affect the appearance of the letter so previewing the letter lets you make sure the format and content is correct.

1. From Searches and Reports, click the **Reports** tab.
2. Select **Church Growth Tools Reports** from the drop-down and click **Go** .
3. Under **Lists**, select **Note Writer**.
4. Click **Customize**.
5. On the **Report Options** tab, select the options you want to use in the letter.
6. Click **Preview**. The letters display. Review the format and content to make sure they are what you want.

Printing a Note Writer Letter

Once you are happy with the letter format and content, you are ready to print.

1. From Searches and Reports, click the **Reports** tab.
2. Select **Church Growth Tools Reports** from the drop-down and click **Go** .
3. Under **Lists**, select **Note Writer**.
4. Click **Customize**.
5. On the **Report Options** tab, choose the letter options you want to use.
6. Click **Compose Letter** and write the letter.
7. Click **Preview**.
8. Click **Print** .

Saving a Note Writer Letter

You can save the options and letter you've written in Note Writer so you can use the same letter format in the future. You can create multiple letters and save each so make sure to give each one a name that easily identifies it.

1. After setting up the Note Writer letter, click **Close**.
2. In the Save Report dialog box, enter a new, descriptive name for the letter.
3. To make a letter public, select **Public Report**. If you do not select the option, only you can see this version.
4. You can enter a description to describe the letter and how/when to use it.
5. Click **Save**.

Working with the RISK SOS Report

RISK/SOS is a tool that you can use to analyze attendance trends over time, comparing an individual's attendance over two periods. With this analysis, you can develop appropriate follow-up programs to recognize those people who are regular attenders, and set up a contact plan for those whose attendance pattern may be slipping.

RISK/SOS tracks two different attendance patterns. RISK analyzes attendance over the current time frame and SOS analyzes attendance over two consecutive time periods.

The RISK analysis categorizes attendees into one of four groups:

- Regular Attender
- Irregular Attender
- Sporadic Attender
- K)Non-Attender

The SOS analysis categorizes attendees into one of three groups:

- Soaring Attendance (increased attendance from the preceding period)
- Ongoing Attendance (similar attendance from the preceding period)
- Slipping Attendance (decreased attendance from the preceding period)

The change in attendance is based on a grade analysis. The grade analysis categorizes attendees into one of five groups (A, B, C, D, F) based on percentage of times present. The percentages are defined by you. You can also print graphs and statistical data based on the RISK/SOS analyses to aid in the development of your ministry.


Statistical Analysis

The RISK/SOS report provides a statistical analysis of the data you can use to compare and contrast Period 1 and Period 2. Detailed statistics are provided for the number of Presents, Absences, and Grades generated with the RISK/SOS report.

You can view the statistical analysis of the group you've selected to graph by clicking on the **Statistics** tab.

Setting up the RISK SOS Report

The RISK/SOS report options you choose affect the format and information that displays when you run the report. These options allow you set up the reports in a wide variety of ways. For instance, you can base your report on Sunday School class or attendance patterns. You can also include a wide variety of information based on your needs.

1. Under Searches and Reports, click the **Reports** tab.
2. In the drop-down list, select **Church Growth Tools Reports** and click **Go** .
3. From **Statistics**, select **RISK/SOS**, and click **Customize**.
4. On the **Report Options** tab, select the desired **Master Group**.
5. Select the desired **Name Options**.
6. Select **Print Address** options to use.
7. If you want to use last search results, select **Use Search Results**.
8. Select the desired **Report Date**.
9. Select the appropriate **Report Settings** and **Formatting** options.
10. Click **RISK/SOS Options** to set up the RISK Period and SOS and RISK scales to use. See Selecting RISK SOS Options.
11. Click **RISK/SOS Filter** to select any filters you want to use. See Setting RISK SOS Filters.
12. Click **Graph** to view report results in graph format.
13. Click **Preview** to view your results.

Selecting RISK SOS Options

On the RISK/SOS report, you can customize the RISK/SOS scales based on the attendance ranges you want to compare. This is optional and many use the default scales already set up.

1. On the **Report Options** tab, click **RISK/SOS Options**.
2. Under **Period**, select the number of weeks you want counted in the **Period Length**.
3. From the **Period Day** drop-down list, set the day you want the week to begin on.
4. Select if you want the posting to match the period day.
5. Set the **SOS Grade Scale** and **RISK** by doing one of the following:
 - Enter an **SOS Grade Scale** and click **Calc RISK** to automatically calculate the RISK numbers to match SOS grade ratios.
 - Enter a number range for **RISK** and click **Calc SOS** to automatically calculate the SOS grades to match RISK numbers.
 - Enter both SOS Grade Scale percentages and number ranges for **RISK**.
6. Click **Return**.

Setting RISK SOS Filters


Setting Risk/SOS filters allow you to tailor your report. You can use RISK/SOS filters to filter people by RISK/SOS attendance information.

1. On the **Report Options** tab, click **RISK/SOS Filter**.
2. In the **Available Fields** pane, select the field your want to filter on and click **Edit**.

3. Choose the grade, attender type, or SOS type.
4. Click **OK**.
5. Repeat steps 2 - 4 for each field you want to include in the filter.
6. Click **Return**.



Previewing the RISK SOS Report

The RISK/SOS report options you choose affect the appearance and content in the report so previewing a report can help you make sure it is what you want before you print.

1. From Searches and Reports, click the **Reports** tab.
2. Select **Church Growth Tools Reports** from the drop-down and click **Go** .
3. Under **Statistics**, select **RISK/SOS**.
4. Click **Customize**.
5. On the **Report Options**, select the options you want to include in the report.
6. Click **Preview**. The report displays. Review the format and appearance to make sure it is what you want.

Printing the RISK SOS Report

Once you are happy with the report format, you are ready to print.

1. From Searches and Reports, click the **Reports** tab.
2. Select **Church Growth Tools Reports** from the drop-down and click **Go** .
3. Under **Statistics**, select **RISK/SOS**.
4. Click **Customize**.
5. On the **Report Options** tab, set up the report.
6. Click **Preview**.
7. Click **Print** .


Saving the RISK SOS Report

You can save the RISK/SOS report you set up so you can use the same report format in the future.

1. After setting up the RISK/SOS report, click **Close**.
2. In the Save Report dialog box, enter a new, descriptive name for the report.
3. To make the report public, select **Public Report**. If you do not select the option, only you can see this version.
4. You can enter a description to describe the report.
5. Click **Save**.

Creating a RISK SOS Graph

With Church Growth Tools, you can create graphs to assist in your RISK/SOS analysis. In addition to providing visual perspective, you can also use graphs to give flair to your reports. You have several graphs to choose from, and most are available as pie charts, line graphs or bar graphs.

1. Under Searches and Reports, click the **Reports** tab.
2. From the drop-down list, select **Church Growth Tools Reports** and click **Go** .
3. From **Statistics**, click **RISK/SOS**, and click **Customize**.
4. Click **Graph**.
5. On the Structure menu, select the Group, Division, Department, or Class for which you want to view a graph and double-click. To view sub-levels such as Divisions, Departments, or classes, click the Open List next to each level with a sub-level.
6. On the **Graph** tab, select the graph you want from the drop-down list.
7. Click **View 3D** to create a 3D graph.
8. Click **Use Patterns** to use patterns rather than solid colors in the graph section. Patterns are especially helpful when printing black and white graphs.
9. Use the **Rotate** option up and down arrows to turn the graph.
10. If you want additional information to display under the graph title at the top of the page, enter text in the two boxes.
11. Click **Print**.

Additional Fields

RISK/SOS Graphs

- **RISK Profile Pie - Periods 1 and 2** - Pie chart showing the percentages of people who fall into each of the four RISK categories for the RISK/SOS selected period.
- **RISK Profile Bar** - Bar graph showing the percentages of people who fall into each of the four RISK categories for both periods.
- **RISK Profile Line** - Line graph showing the percentages of people who fall into each of the four RISK categories for both periods.
- **Grade Profile Pie - Periods 1 and 2** - Pie chart showing the percentages of people who fall into each of the five grade scale categories for the selected period.
- **Grade Profile Bar** - Bar graph showing the percentages of people who fall into each of the five grade scale categories for both periods.
- **Grade Profile Line** - Line graph showing the percentages of people who fall into each of the five grade scale categories for both periods.
- **Slope - Grades** - Line graph showing the change in average grade from Period 1 to Period 2.
- **Slope - Presents** - Line graph showing the change in percent present from Period 1 to Period 2.
- **Slope - Absents** - Line graph showing the change in percent absent from Period 1 to Period 2.
- **Trend** - Pie chart showing the percentages of Soaring, Ongoing, and Sliding attendees.

Saving a RISK SOS Graph as an Image

You can save a RISK SOS graph as an image file which you can then import into another document such as a word processing document.

1. Create a graph.
2. Right-click the graph and click **Save to Image**.
3. Enter a File name for the graph.
4. Click **Save**.

Working with RISK SOS Automation

RISK/SOS Automation ties the RISK/SOS report, Assignment Form and Note Writer together so you can perform the RISK/SOS analysis, set up contacts, and create mail merge letters in one step.


With RISK/SOS Automation you can create Actions that are performed automatically based on the RISK/SOS analysis. These actions can include printing letters created in Note Writer, printing a phone list or adding an incomplete contact template. You can set up templates in the Connections module.

For example, you can set up RISK/SOS Automation to add an incomplete contact for those whose Attendance Grade changed from an A in Period 1 to a D in Period 2, print a phone listing of sporadic attenders, and send a congratulatory letter to those whose attendance is soaring.

You can also set up different versions of RISK/SOS Automation to reflect different outreach and connections strategies. For example, one month, you may want to target those whose attendance has been sliding, while the next month you may want to target sporadic attenders. You can also choose which RISK/SOS analysis you want to use from any analyses that you have saved.


Setting up the RISK SOS Automation

You can set up RISK/SOS Automation to perform routine tasks associated with the RISK/SOS analysis.

1. From Searches and Reports, click the **Reports** tab.
2. From the drop-down list, click **Church Growth Tools Reports** and click **Go** .
3. Under **Statistics**, select **RISK/SOS Automation**.
4. Click **Customize**.
5. Select the **Name Options** and **Report Options** as necessary.
6. Add **Automation Actions** as necessary.
7. Click **Preview**.
8. Click **Print**, then **Close**.

Adding an Automation Action

You can add actions to the RISK/SOS Automation to perform routine tasks based on the RISK/SOS analysis.


1. From Searches and Reports, click the **Reports** tab.
2. From the drop-down list, select **Church Growth Tools Reports** and click **Go** .
3. Expand **Statistics** and select **RISK/SOS Automation**.
4. Click **Customize**.
5. Under **Automation Actions**, click **Add**.
6. Enter an **Automation Action Name**. This name should describe the action you want to perform. You must enter a name.
7. Select whether to base the action on change in **Grade**, **RISK**, or **SOS**. Click **Next**.
8. Set the **Period 1** and **Period 2**, **Change Over Period you want**. Click **Next**.
9. Set the actions to perform. You can add an unlimited number of actions.
 - **If incomplete contacts exists after** — Select a date so the Automation Expert can find individuals who have an incomplete contact scheduled on or after the designated date.
 - **Do the following** — Select the option to be carried out.

Else do the following — If the individual does not have an incomplete contact scheduled on/after the designated date, select a second option to perform.

10. Click **Finish**.


Editing an Automation Action

You can make changes to existing Automation Actions if necessary.

1. From Searches and Reports, click the **Reports** tab.
2. From the drop-down list, select **Church Growth Tools Reports** and click **Go** .
3. Expand **Statistics** and select **RISK/SOS Automation**.
4. Click **Customize**.
5. Under **Automation Actions**, click **Edit**.
6. Edit each part of the Automation Expert as necessary.
7. Click **Next** to move to the next window.
8. Click **Finish** to save your changes.

Running RISK SOS Automation

After setting up the RISK/SOS analysis, other reports, and contact templates, you can run RISK/SOS Automation.

1. From Searches and Reports, click the **Reports** tab.
2. From the drop-down list, select **Church Growth Tools Reports** and click **Go** .
3. Expand **Statistics** and select **RISK/SOS Automation**.
4. Click **Customize**.
5. Select the desired **Name Options**.
6. In the **Report Options**, click the **Process RISK/SOS Using** drop-down list and select a saved RISK /SOS report to print the default report.
7. Select other **Report Options** as desired.
8. Make any necessary selections or changes to **Automation Actions**.
9. Set the **Contact Analysis** date range.
10. Click **Preview** to view the report or **Print** to print the report. If you choose the **Preview** option, you will need to click **Print** to print each report individually.

Saving a RISK SOS Automation

You can save the options you choose to use in the RISK/SOS Automation so you can use the automation in the future. You can create multiple automations and save each so make sure to give each one a name that easily identifies it.

1. After setting up the RISK/SOS Automation, click **Close**.
2. In the Save Report dialog box, enter a new, descriptive name for the report.
3. To make the automation public, select **Public Report**. If you do not select the option, only you can see this version.
4. You can enter a description to describe the automation.
5. Click **Save**.