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Housekeeping Items

- My name is Andy Perry and I am the Executive Administrative Assistant and the support person for KairosMessenger
- We will start at 5 minutes after to allow other to join
- Please remain muted during the presentation and hold questions until the end
- This presentation will be about an hour and a half



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Objectives

In this training you will learn how to:

- Clean up and maintain volunteer data
- Understand the Election Eligibility Report to determine vacancies
- Use KairosMessenger to request nominations and votes
- Enter elections into KairosMessenger
- Send emails to the community
- Send emails to elected members with job descriptions and logins
- Print the roster
- Maintain the elections throughout the year


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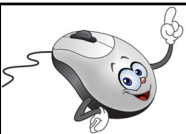
Get Prepared

Clean Data Makes for a Smooth Election

- Ensure the last Weekend's Ezra Data is Uploaded as the Leader Report
KairosMessenger>Program>Weekends>Leader Reports
- **NOTE:** "Active" status is currently 6 years

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Get Prepared

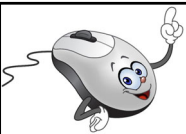
Reporting Tool for Quick Clean Up

Use the "Missing Info" Report to organize a data clean up effort

- Print the report and work it as a group
- Only the Secretary and Data Coordinator can make changes to volunteer records in KairosMessenger

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Get Prepared

Volunteers>Volunteer List

[ALL](#) | [Active](#) | [Inactive](#) | [Entry List](#) | [Prospect](#) | Missing Info

Bad/Missing Contact Information
 A Volunteer's contact information is VERY important. Missing or bad information can result in duplicate or missing volunteers. By selecting the kind of contact information for you to review below, you can then print the "Missing/Bad Info" to identify the entries needing cleanup. Note that an email flagged as "Bad" means the email is being rejected - most likely because the email account is closed or there is an error in the address.

Select the entries you want to include:

Bad/Missing Email:

Bad/Missing Cell Phone:

Bad/Missing Home Phone:

Bad/Missing Home Address:

Missing Demographics:


Not Interested/Not Serving:

Exclude the following:

Not Interested/Not Serving:

[Print Missing/Bad Info](#)

[Print Volunteer List](#)

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Update Volunteer Records – Contact Info

The screenshot shows the 'Update Volunteer Record' form for 'Carrie Casey - 92047'. The 'Name/Contact' tab is active. Fields include Last Name (Casey), First Name (Carrie), Suffix, and Substitution (Casey). A red circle highlights the 'First Name' field with the note '(Do NOT use Titles in First Name)'. Other fields include Address 1, Address 2, City, State, Zip, Cell Phone, Home Phone, and Email. A 'NEW' indicator is present next to the 'This person is no longer serving' checkbox. Buttons for 'Save' and 'Cancel' are at the bottom.

- Records are created by Ezra
- No record until they have completed serving on a Weekend
- Multiple tabs organize information
- Contact Information is most important
- **Do not erase information**

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Update Volunteer Records – Demographic Info

The screenshot shows the 'Update Volunteer Record' form for 'Carrie Casey - 92047'. The 'Personal' tab is active. Fields include Birthdate, Sex (Male), Marital Status (Married), Ethnicity (Caucasian), and Religion (Methodist). A list of 'Religions' is visible on the left. Buttons for 'Save' and 'Cancel' are at the bottom.

- Demographic information needs to be completed
- Data Coordinators should check if Leaders are completing this in Ezra

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Update Volunteer Records – Ministry

The screenshot shows the 'Update Volunteer Record' form for 'Carrie Casey - 92047'. The 'Ministry' tab is active. Fields include Primary Country (United States), Primary State (Iowa), and Primary Ad Council (Ezra - IA). A red circle highlights the 'Primary Ad Council' dropdown menu. Below are checkboxes for 'Clergy', 'Musician', and 'Speaker Bureau'. Buttons for 'Save' and 'Cancel' are at the bottom.

- Change Primary Ad Council only if person is primarily serving elsewhere
- Identify Clergy, Musician, Speaker Bureau, Recruiting Group

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Update Volunteer Records – Continuing Ministry

Update Volunteer Record
Carrie Casey - 82047

Name/Contact | Personal | Ministry | Training | Restrictions | Weekends/Courses | **Continuing Ministry**

Involvement in Continuing Ministry Activities

Active Cont Ministry: Yes

Filter List: ALL Cont Min | Prayer & Share | Monthly Reunion | 1-2 Day Retreat


No Records Found



- This area is under construction
- If someone is attending Continuing Ministry, you can click “Yes”
- Do not enter the type from Filter List


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Advisory Council Facts

- “Active” community members nominate and elect members
- 13 required positions
- May have optional positions (non-voting)


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Advisory Council Facts

- Elections held annually
- Secretary starts process in September for following year
- Members elected to 3-year term
- Members elected to seat on Advisory Council not a specific position

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Advisory Council Facts

- **Qualification to be elected:** Must have served on a Team and/or have been active in the Continuing Ministry in the past 6 years
- Must have done Weekend in the past to do Continuing Ministry
- See the Advisory Council Operating Procedures for additional qualifications


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Advisory Council Facts

- Members may be re-elected for up to 3 consecutive 3-year term (9 years)
- Chair requires 1 year on Advisory Council before serving
- Chair can only serve 5 consecutive years


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Advisory Council Facts

- All Elected Members vote on positions
- Positions are for a 1 year
- Each year someone can hold a different position


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Advisory Council Facts


- Elections must be completed by December 1st
- Elections must be entered into KairosMessenger by December 31st
- All prior year logins are cancelled January 31st
- See ACOP - Advisory Council Operating Procedures for All Election Guidelines

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Election Composition

3 years make up the current Advisory Council



1/3 of the members (4-5 volunteers) are elected each year

1/3 of the members complete their 3-year term each year

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4 Steps of the Election Process

Organization>Elections>Advisory Council

- 1** Nomination & Voting

- 2** Record Positions

- 3** Send Notifications

- 4** Print Roster


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UPDATED Election Management Screen

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Nomination & Voting

Elections process starts in September
Elections must be completed by December 1st
Elections must be entered into KairosMessenger by December 11th

Vote

Determining Seats Open for Election

Enter Election Year: 2024 **Must Enter Year and TAB Before Recording or Emailing**

1. Nominations and Voting for Advisory Council Membership
Send Email request for nominations to the Advisory Council and then to vote for the Nominees.

Print Election History Print History of Elections

Email Nomination Request

Email Election Vote

- How do you know how many seats are up for election?
- What if I have documents showing more elections than what's in KairosMessenger?

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1
Nomination & Voting

Elections process starts in September
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Vote

Determining Seats Open for Election

Print History of Advisory Council Elections
This allows you to see the history of elections to Advisory Council positions by person by their role. If no one was elected to a specific position then the role will show as "vacant."

Select Report Option

Current Eligibility Total History

Print Election History

Close

- Current Eligibility vs Total History

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Nomination & Voting

Elections process starts in September
Elections must be completed by December 1st
Elections must be entered into KairosMessenger by December 31st

Vote

Nominations and Voting for Advisory Council Membership

Once election is complete all Advisory Council members (13) vote for positions

- Done in meeting
- Term for position is 1 year
- Great time to get the Annual Affiliation Agreement Signed



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Nomination & Voting

Elections process starts in September
Elections must be completed by December 1st
Elections must be entered into KairosMessenger by December 31st

Vote

Optional Positions

- Appointed by the Chair
- Non-voting
- No access to KairosMessenger
- Term is 1 year
- Cannot serve more than 3 years
- Does not count towards Elected terms of service



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1
Nomination & Voting

Elections process starts in September
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Elections must be entered into KairosMessenger by December 31st

Vote

Newly Formed Advisory Council (New Start)

- Officer positions must be filled at start-up
- Officers are Chair, Vice Chair, Secretary, Treasurer, and KairosDonor (or Financial Secretary (TX))
- New Start must establish positions with varying terms to create the rotation
- Vice Chair serves as Continuing Ministry Coordinator until position is filled
- New Start has two years to grow into having full standard voting positions (appoint)
- Members serving on another Advisory Councils are for 1 year term

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1

Nomination & Voting

 Elections process starts in September

 Elections must be completed by December 1st

 Elections must be entered into KairosMessenger by December 31st

Continuing Ministry Only

- If New Start - follow the New Start section
 - Must work to do the full program within 2 years
- If approved to do Continuing Ministry only, then must keep a small Advisory Council in place:
 - At least the positions of Chair, Vice Chair (optional), Secretary, KairosDonor Coordinator, Treasurer, Institutional Liaison and Continuing Ministry Coordinator
- It should always be the goal of working to do the full program

Vote

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Record Positions

Record Position Elections

Record and Review Annual Advisory Council Elections
The current Advisory Council secretary can track, communicate, and record annual elections to the Advisory Council positions. You can also print a roster of your Advisory Council's members and positions.

What's Different? Recording Elections is a simpler view, click to see what's different

Enter Election Year: **Must Enter Year and EM Before Recording or Emailing**

1. Nominations and Voting for Advisory Council Membership
Send Email request for nominations to the Advisory Council and then to vote for the Nominees.

Print History of Elections

2. Record Position Elections
Record the position election results.

Click to process elections of Standard Positions

View Elected Persons

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Record Positions

Must enter year for button to be available

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Record Positions

Record Position Elections

This is a listing of the Advisory Council standard positions.

Year	Advisory Council Role	Elected Person	Date Received	Date Installed	ACT Date	Assessment Date	Password
2024	Advisory Council Chair						
2024	Vice Chair						
2024	Secretary						
2024	Institutional Liaison/Case Mgr						
2024	Treasurer						
2024	Institutional Liaison						
2024	Outreach/Revolving Coordinator						
2024	Outreach/Community Coordinator						
2024	Support Coordinator						
2024	Organizational Director						
2024	Continuing Ministry Coordinator						
2024	Data Coordinator						
2024	Communications Coordinator						

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Record Positions

Must enter year for button to be available

Agreement Date Password

Only the Secretary can see the Passwords

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www.MyKairos.org

- Most documents under Downloads
- Register Weekend Info
- Elections resources
- Where We Serve Updates
- Supply Ordering
- Training
 - **Ezra**

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Learn More

Advisory Council Operating Procedure (ACOP): <http://www.mykairos.org/docs/ac/acop.pdf>

Election Tutorial: <http://www.mykairos.org/Election.html>

Kairos Ezra Information: <https://kairosezra.com/>

KairosMessenger: www.kairosmessenger.org

Kairos Excellence Initiative: <https://www.kairosjei.com/>

KairosMessenger Support email: kairosmessenger@mykairos.org

Each website has a written and video tutorial on every step.

Elections must be completed by December 1st

Elections must be entered into KairosMessenger by December 31st


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