

# Leader Checklist & Resources for *REALM*

**NOTE: Not every suggested task listed here needs to be done by each Leader**

## What's *Realm* and why should I use it?

- Go to our website <https://www.sbapeters.org/realm> to see what *Realm* is & how it can help you get closer to Christ.

## What are frequently asked questions and answers (FAQ)?

- Read our **FAQ** (excellent document) by going to our website at <http://www.sbapeters.org/realm>; hard copies are also available in the church Narthex

## How can I learn and become a capable *Realm* user?

1. **As with any electronic system, you learn by using it.** You can use *Realm* to plan an entire Event or post a need. For example, you can request people bring food to an Event & their specific responses are documented
2. Go to Parish website <http://www.sbapeters.org/> to download our 4-pp "**Getting Started with *Realm***"
3. Go to <https://www.sbapeters.org/realm-help-videos> to view videos; view our "**Introduction to *Realm***"
4. Leaders can read the 8-pp "***Realm* Group Leader Guide**" from Parish website <http://www.sbapeters.org/>

## What actions do I need to take to set up a new Ministry Group? See Checklist on page 2

1. Leader needs to know the Group's mission & should have a plan whereby *Realm* will help accomplish Group's goals
2. Leader should designate 1-2 people as Leaders to help Group members with projects & usage of *Realm*.
3. Someone in your Group may wish to become adept at using the *Realm* mobile app, so he/she can help others
4. Leader could add group image and nickname (e.g., 'Ben's Men' for Men's Club of St. Benedict) to Group description
5. Leader creates Group Description (e.g., Mission) so people can locate and decide if they want to join your group.
6. Leader decides who can post what type of content.
7. Leader creates welcome message & may wish to include an events calendar, relevant content and/or prayer request
8. **Leaders can easily find people in our *Realm* roster and place them into his/her Ministry Group to establish TWO-way communication with no invitation! See question #14 in our FAQ for 'how-to' steps.**
9. **If Leader wants to communicate w/ someone NOT on *Realm*, merely add that person's name & email address to a Group to establish ONE-way communication as an Off-line User; see page 3 for 'how-to's'**
10. **A link is included with *each* communicate to an Off-line User that enables him/her to join *Realm* and establish TWO-way communication with your Group OR a person could always directly email Leader**
11. Leader can share paper copy of 4-pp "**Getting Started with *Realm***" (on Parish website) with those new to *Realm*
12. Replacements (e.g., lectors, ushers, altar servers, Eucharistic Ministers, catechists, etc.) can **easily** be located by making a Group Post with particulars listed in Title, e.g., "Replacement Altar Server: 3/17/2019 at 10 AM Mass."
13. Many *Realm* capabilities are discussed in videos on Parish website <https://www.sbapeters.org/realm-help-videos>

## What resources are available to Leaders and Users on *Realm*?

- The FAQ document on our Parish website lists ways to get help with *Realm* capabilities & lists many 'how-to' steps

## What *Realm* resources are on Parish website?

- Our Parish website has about twenty (mostly 1-2 minutes long) videos & several documents to help users

## How do I develop engaging content for my Group? Content is King.

- See "**Engaging Content**" document on our church website at <https://www.sbapeters.org/realm>

# Group Leader Checklist / PROCESS that should be followed

## Implementation Tasks

GOAL	No	Done	To-Do Actions	Comments
LEADER	1		Review <b>"Getting Started with Realm"</b> (4-pp). Then view selected Help-Videos <i>for Realm</i> (good for all users)	On Parish website. Most videos are brief (1-2 minutes) "how-to" videos
	2		Review <b>Realm FAQ (excellent document)</b> with Help options	<b>On Parish website; Read questions on pp 1-2</b>
	3		View <b>Introduction to Realm</b> video (ca 45 min) to learn why to use it, realize tool capabilities & then learn site navigation	On Parish website
	4		Review 8-pp <b>"Realm Group Leader Guide"</b> (a how-to doc.)	On Parish website
LEADER	5		Identify your Group's Mission and Goals for the year	<b>Determine how Realm can help your Ministry / Group / Team</b>
	6		<b>How and what do you communicate now?</b> Need replacements for your Ministry? If so, see page 1	You may need <i>Realm</i> Group PER project
	7		Designate 1-2 members to help your members with <i>Realm</i>	One may decide to become adept at APP
SETUP	8		Contact a member of the <i>Realm</i> Core Team	To assist Leader establish Ministry Group
	9		Add a Ministry Group name and picture or image (optional)	Picture or graphic depicting Group
UP	10		Decide who can post and what type of content	<b>If Leaders use Realm, members will !!</b>
	11		Create welcome message for your group	<b>Realm = Joining Groups ≠ Friends Talking</b>
GROUP	12		Review Engaging Content document	On our Parish website
	13		<b>Post events/meeting calendar, projects &amp; relevant content.</b> Review 2-pp Engaging Content document on church website	<b>Relevant content has value to members; Use brief conversations expecting responses</b>
JOIN	14		Create Group description and select available Tags	Search-engine keys to find your Group
	15		How will others join: Individuals can REQUEST to Join.	Leaders can decide who to accept
JOIN	16		Merely select your Group members from our <i>Realm</i> directory to establish TWO-way communication	No invitation needed
	17		To communicate with someone not on <i>Realm</i> , add their name & email address to establish ONE-way communication	These Off-line users can either email you or hit a link to join <i>Realm</i> & your Group
USE	18		Can share paper copy of <b>"Getting Started with Realm"</b>	<b>Share files/resources (e.g., sheet music)</b>
	19		Can Assign user to be either a "Member, Leader or Guest"	Default user status is "Member"
REALM	20		Can NO longer share content or select "No Responses"; chats available, texting coming soon, promotions later on	A Leader of two groups can send two identical posts, not one that is shared.
	21		View selected videos <b>at Team meetings</b> to get Ministry participants familiar with <i>Realm</i> usage	Visit Parish website; see video listings on pp 4 & 5 of this document.
M	22		To minimize emails to Group members, Leader can use direct email with responses going back only to him/her	Engaging content & reason to visit site Optional to have person for promotions
	23		Some may utilize <b>powerful</b> Event Registration or Pathways	Advanced <i>Realm</i> features; see FAQ

## Questions enabling *Realm* Core Team members to help Ministry Group Leaders

Here are a **number key questions** that a Ministry-Group Leader(s) and *Realm* Core Team member should discuss:

(a) How does your Ministry Group communicate now? Do you utilize any email lists?

Some Ministry Leaders communicate with their members via both direct email and via *The City* (the forerunner of *Realm*) — duplicating efforts. **To simplify Leader's communication**, consider having Leader convert non-*Realm* users into Offline *Realm* users so these folks are kept informed of your Ministry's activities & have at least one-way communication.

This is done by merely placing a person's name and email address (and possibly other profile information) into your Group. From your Group page, click on 'Participants', then '+ add person', under search select 'Add Profile'. You can put the person's name (required), street address, email address (required), preferred phone number and then **hit Save**.

This could be an evolutionary vs revolutionary way to get parishioners to be more active with their faith by using *Realm*. Offline users could still communicate directly to Leaders via email or readily join *Realm* to gain two-way communication.

(b) What is the nature of your communications? Is your Group truly hospitable & welcoming?

(c) **What are your vision and goals of your Group? Projects? Events? Fund raisers?**

(d) How does your Group bring members closer to Christ?

(e) How do you grow your membership or evangelize people?

(f) Do you conduct Group events or have Group needs? Have any Group prayer requests?

(g) Do you have pictures of your Group in action that would be encouraging and enriching?

(h) **Want to increase your Group membership?** Queries: multiple-variable skill & ability searches.

(i) Are there other similar Ministry Groups that you should partner / communicate with?

(j) Does your Group need to both communicate AND collaborate?

(k) Does your Group conduct Service or Volunteer Opportunities? How can *Realm* help you?

(l) How can *Realm* enhance your life? Share a story with your Ministry Group

(m) Could your Ministry Group utilize the **MULTIPLE** capabilities of Event Registration? See FAQ

(n) Could your Ministry Group utilize the **POWERFUL** capabilities of Pathways? See FAQ

**Members of *Realm* Core Team:** Carol Dolinar, Mike D'Onofrio, Fr. Bob Miller, Keith Ross, Bill Rousis, Beth Ruth, Stan Solak & Debbie Starr

**GROUPS** ([HTTPS://WIKI.ACSTECHNOLOGIES.COM/DISPLAY/TL/GROUPS](https://wiki.acstechnologies.com/display/TL/Groups))

Top level ministry areas: 1:15

Organize ministry areas: 0:51

Add groups: 1:08

Events: 1:56

Edit and cancel events: 0:52

**Group participants: 1:38**

Attendance profiles: 1:53

Mark attendance: 1:42

**Promotion: 1:57**

**COMMUNICATION** ([HTTPS://WIKI.ACSTECHNOLOGIES.COM/DISPLAY/TL/COMMUNICATION](https://wiki.acstechnologies.com/display/TL/Communication))

Sign up for *Realm*: 1:00

**Enable communication settings: 1:24**

**Edit group settings: 1:47**

**Manage groups (for Leaders): 2:03**

**Manage *Realm* invitations: 0:41**

Create a post: 0:57

Post a photo: 0:43

Create a group event: 1:30

Send a message: 1:27

Find groups: 0:39

**EVENT REGISTRATION** ([HTTPS://WIKI.ACSTECHNOLOGIES.COM/DISPLAY/TL/EVENT+REGISTRATION](https://wiki.acstechnologies.com/display/TL/Event+Registration))

Create an event: 4:10

**Manage an event: 2:12**

**Mark attendance for events: 2:16**

Cancel an event: 1:25

**Conditional questions: 1:31**

**Event (i.e., name) tags: 1:18**

**Add discounts: 2:35**

## Realm Videos Readily Available on Parish Website

No	Audience	Title	Description / Duration (min)	Parish Website Location
1	All Users	Introduction to <i>Realm</i>	Learn why we are using the <i>Realm</i> platform & how to navigate. <b>45 min.</b>	<a href="https://www.sbapeters.org/realm-help-videos">https://www.sbapeters.org/realm-help-videos</a>
2	All Users	Sign Up for <i>Realm</i>	How to create & set up your <i>Realm</i> Account. <b>1 min.</b>	<a href="https://www.sbapeters.org/realm-help-videos">https://www.sbapeters.org/realm-help-videos</a>
3	All Users	Edit Profiles	How to set up you <i>Realm</i> Profile account settings. <b>1 min.</b>	<a href="https://www.sbapeters.org/realm-help-videos">https://www.sbapeters.org/realm-help-videos</a>
4	All Users	Find Groups	Join groups or ministries that you may wish to join. <b>1 min.</b>	<a href="https://www.sbapeters.org/realm-help-videos">https://www.sbapeters.org/realm-help-videos</a>
5	All Users	Create a Post	Creating a Topic allows communication with an entire Ministry Group. <b>1 min.</b>	<a href="https://www.sbapeters.org/realm-help-videos">https://www.sbapeters.org/realm-help-videos</a>
6	All Users	Post a Photo	Share a photo or group of photos to your group. <b>1 min.</b>	<a href="https://www.sbapeters.org/realm-help-videos">https://www.sbapeters.org/realm-help-videos</a>
7	All Users	Create a group event	Create and organize meetings for your group. <b>2 min.</b>	<a href="https://www.sbapeters.org/realm-help-videos">https://www.sbapeters.org/realm-help-videos</a>
8	All Users	Send a Message	Message one person or more selected people on <i>Realm</i> . <b>1 min.</b>	<a href="https://www.sbapeters.org/realm-help-videos">https://www.sbapeters.org/realm-help-videos</a>
9	All Users	Manage Account	Edit your email, password, limit the number of emails you receive; <b>2 min.</b>	<a href="https://www.sbapeters.org/realm-help-videos">https://www.sbapeters.org/realm-help-videos</a>
10	App Users	Let's Get Connected	You can use the <i>Realm</i> app to stay connected. <b>2 min.</b>	<a href="https://www.sbapeters.org/realm-app-videos">https://www.sbapeters.org/realm-app-videos</a>
11	App Users	Connect: Events	Using the app to create and manage events. <b>1 min.</b>	<a href="https://www.sbapeters.org/realm-app-videos">https://www.sbapeters.org/realm-app-videos</a>
12	App Users	Connect: Groups	Using the app to connect with your groups. <b>1 min.</b>	<a href="https://www.sbapeters.org/realm-app-videos">https://www.sbapeters.org/realm-app-videos</a>
13	App Users	Connect: Newsfeed	Use the app to find news and events in your church. <b>1 min.</b>	<a href="https://www.sbapeters.org/realm-app-videos">https://www.sbapeters.org/realm-app-videos</a>
14	App Users	Connect: Profiles	Use the app to set up your profile. <b>1 min.</b>	<a href="https://www.sbapeters.org/realm-app-videos">https://www.sbapeters.org/realm-app-videos</a>
15	App Users	Connect: Search	Use the app to search for member information for <i>Realm</i> users. <b>1 min.</b>	<a href="https://www.sbapeters.org/realm-app-videos">https://www.sbapeters.org/realm-app-videos</a>
16	Leaders	Manage Groups	Manage participants in your Ministry Group. <b>2 min.</b>	<a href="https://www.sbapeters.org/realm-leader-videos">https://www.sbapeters.org/realm-leader-videos</a>
17	Leaders	Edit Group Settings	Add or edit information about Ministry Group. <b>2 min.</b>	<a href="https://www.sbapeters.org/realm-leader-videos">https://www.sbapeters.org/realm-leader-videos</a>
18	Leaders	Group Participants	Add, remove participants in your Ministry Group. <b>2 min.</b>	<a href="https://www.sbapeters.org/realm-leader-videos">https://www.sbapeters.org/realm-leader-videos</a>
19	Leaders	Create a Group Event	Coordinate and organize events in your Ministry Group. <b>2 min.</b>	<a href="https://www.sbapeters.org/realm-leader-videos">https://www.sbapeters.org/realm-leader-videos</a>