

# How to complete your advocate report

## Quick tips on recording your quarterly activity

As Everence advocates, you may have questions about how to fill out your quarterly activity report. Here are quick tips and examples to help you complete your report. If you need further information, contact your church relations representative.

**Every time you fill out the quarterly report, check in the space provided which quarter your report covers.**

### **A. Used stewardship education resources**

#### *1. Materials*

- Items can be selected from Everence created and recommended resources or other stewardship resources that you find.
- One credit is given for each different resource. Using one copy of two different resources gives you two credits. Using two copies of one resource gives you only one credit.
- Credit is given for using previously purchased materials for group or individual study, and for each quarter that the material is used.

#### *2. Events*

- If an Everence representative gives multiple presentations on a Sunday morning, you can receive multiple credits. Example: Two credits are given for a sermon and a Sunday school class.
- Everence representatives are available to lead events in your congregation and your pastors and other leaders can lead stewardship events as well.

### **B. Participated in Everence advocate training activities**

#### *1. Advocate training*

- The Everence representative who trains you is typically your church relations representative.
- Any personal meeting/call or group meeting/conference call counts.
- Examples include: Fall training meetings, advocate appreciation events or video, and other training presentations sent via email.

#### *2. Everence product and service awareness*

- You meet with any Everence representative, including financial advisors and charitable services advisors.
- Solo, group meetings and calls with an Everence representative count.

#### *3. Leadership participation*

- Any events such as advocate appreciation events, workshops, seminars or social events.



### **C. Connected people to Everence services**

#### 1. *Congregational connection*

- We recommend sending newsletters or bulletins monthly or quarterly, if possible.

#### 2. *Individual connection*

- The referral could be by phone, email or distribution of Everence information request card. This includes connecting people who are going through a significant life transition (getting married, having a baby, retiring, etc.) with an Everence office or representative.
- A referral means notifying an Everence representative that a specific person would like to be contacted, including the person's name and contact information. (Please ask for the person's permission first.)

#### 3. *Other connection*

- Currently, the primary "other connection" applies to the Everence-sponsored LSS Financial Counseling Service (our budget and debt counseling service).
- A referral counts if you hand out a budget and debt counseling brochure or business card. Each one you distribute counts as one referral.
- You are not responsible for whether someone follows through and calls LSS.

### **D. Shared about Everence**

- Displaying Everence materials means placing them on a table, display rack or bulletin board or showing an Everence video.
- *Toolkit* is an Everence newsletter mailed bimonthly (upon request).
- The *Welcome!* packet is for new church members.
- Each quarter, check to make sure a current Everence poster is still being displayed. You can get one credit for each quarter a poster is displayed.
- The written report is not required by Everence, but is by some congregations.
- Sharing resources includes any conversation about our materials and events.
- The "other" category includes sharing not covered elsewhere on the list.

### **E. Returned advocate report and recorded volunteer information**

The number of volunteers and hours may include:

- Any time spent by an advocate. Your advocate hours include travel and time in personal and group Everence meetings/events, time talking to others about Everence in your congregation, and time gathering information for matching Sharing Fund grants.
- Everence chapter-related activities. You may be unaware of Everence chapters but we are developing them in some parts of the country. If you want to learn more about them, ask your church relations representative.
- Any volunteers and their time related to Sharing Fund grants:
  - Participated in fundraisers to match a grant;
  - Helped individuals benefiting from a grant; or
  - Volunteered for an organization or project, benefiting from a grant.
- Any time in preparing, leading or using Everence materials for discussion, study or group use.