

**Archdiocese of Washington
ParishSOFT Family Suite
User Guide to Maintain an Accurate Parishioner Count**

Background

Accurate parishioner records enable the parish to reach people and engage them in parish life. Parishioner counts are helpful to the Pastor in planning and budgeting for capital campaigns and other parish fundraising. Counts of registered, active parishioner families are used to calculate the amount the parish will pay each year for the Catholic Standard.

This guide provides information on how the parish can maintain an accurate parishioner count.

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Family Suite manager

The Pastor should designate a staff person as the manager of the Family Suite database. In some parishes, this staff person is the parish secretary and in others, the parish bookkeeper. The parish may utilize volunteers to do some of the recordkeeping using the database, but the volunteers must be accountable to the staff person designated by the Pastor. Volunteers should sign confidentiality agreements due to the parishioner personal and financial data available in Family Suite.

Family Suite training and resources

The parish's Family Suite manager should complete self-study training available in the ParishSOFT Family Suite software such as the hands-on Virtual Classroom training and the on-demand Video Lessons. The parish staff can also use the toll-free number to contact the ParishSOFT vendor for additional support. 866-930-4774, option 2, or support@parishsoft.com

Key data points – Registration Status and Family Group

The accuracy of the parishioner count depends on two key data points used to classify parishioners in Family Suite:

- the **Registration Status** checkbox – this box is checked if the parishioner intends to be a registered member of the parish as indicated by their completion of a registration form (of whatever format is used by the parish). See page 3 for a screen shot of the checkbox.

In Family Suite module, a family can be Registered at only one parish, but can be associated with another parish via the Family Group classification.

- the **Family Group** category – there are multiple, mutually exclusive categories to choose from in classifying parishioners. In general, the Family Groups describe the nature of the family's connection to the parish, e.g., Active, Inactive, Contributor only, School only, etc. See pages 4-5 for the full list of Family Groups.

Registered parishioners can have a **Family Group** category of either:

- **Active** – as indicated by Mass attendance, offertory contributions or participation in parish activities.
- **Inactive** – as indicated by the lack of active participation. Inactive parishioners are not deleted from the parish, but merely marked inactive.

Other **Family Group** categories such as Contributor, School Only are for families who do not intend to be registered at the parish and are therefore classified as unregistered. When adding these unregistered families to the parish database, the parish can copy family profile data from their registered parish. See page 8 for more information.

Parishioner families who are Registered and Active represent the official parishioner count of the parish for purposes of reporting such as in the annual parish report to the archdiocese.

Registration Status and Family Groups

There are two data points to be considered when classifying parishioners in Family Suite, the **Registration Status** checkbox and the **Family Group** category (see screen shot below).

The screenshot displays the Family Suite interface for Mr. and Mrs. Maurice Dargis (538148). The interface is divided into several sections:

- Family Details:** Includes a tab for "Family Information" and "Notes".
- Family Information:** Contains a family photo placeholder, "Church of Registration: Holy Trinity, Grosse Pointe", "Details Modified On: Tuesday, September 27, 2016 5:55 PM", "Family Group: Active" (highlighted with a red box and number 2), "Registration Status: ☒ 1" (highlighted with a red box and number 1), "Registration Date: 9/27/2016", and "Unregistered Date:".
- Personal Information:** Includes fields for "Last Name: Dargis", "First Name(s): Maurice and Cristina", "Formal Mailing Name: Mr. and Mrs. Maurice Dargis", "Informal Name: Maurice and Cristina Dargis", "Formal Salutation: Mr. and Mrs. Dargis", "Informal Salutation: Maurice and Cristina", "Email Address:", "Primary Phone:", "Emergency Phone:", and "Emer. Ph. Desc.:". A bracket labeled "Auto Fill" groups the informal name and salutation fields.
- Address Information:** Includes "Primary Address: Home Address", "Country: United States", "Postal Code: 48185 6937", "Address Line 1: 32741 Lone Pine Dr", "Address Line 2:", "City: Westland", "State/Region: Michigan", and "Phone Number:".
- Envelope #:** 0, with a "Next" button.
- Send Mail:** ☒ and "Publish Address: ☒.
- Buttons:** "Edit Details" and "Close".

1. The **Registration Status** check box should be checked if the family **is** registered in the parish.
2. The **Family Group** further defines the family participation in the parish. These values are global and are the standard set of Family Group codes to be used in the archdiocese.

Definition of Family Groups

Active (Registered)	<p>Family has intended to register at the parish by completing a registration form. One or more family members are active as indicated by regular Mass attendance, offertory contributions or participation in other parish activities.</p> <p>The Registration Status check box should be <u>checked</u>.</p>
Inactive (Registered or Unregistered)	<p>Family where all members are designated with a status of inactive.</p> <p>Registration Status can be <u>registered or unregistered</u> depending on the intent of the family in their communications with the parish.</p>
Contributor Only (Unregistered)	<p>Family is contributing offertory or other donations, but is not registered in the parish.</p> <p>The Registration Status check box should be <u>unchecked</u> as the family has not completed a registration form indicating their intent to register at the parish.</p>
Moved (Unregistered)	<p>Family has moved out of the archdiocese.</p> <p>The Registration Status check box should be <u>unchecked</u>.</p>
Religious Ed Only (Unregistered)	<p>Family participates only in the religious education program but is not registered in the parish.</p> <p>The Registration Status check box should be <u>unchecked</u>.</p>
School Only (Unregistered)	<p>Family has children attending the parish school but is not registered in the parish.</p> <p>The Registration Status check box should be <u>unchecked</u>.</p>
Deceased (Unregistered)	<p>All members of the family have a member status of Deceased.</p> <p>The Registration Status check box should be <u>unchecked</u>.</p>
Staff (Unregistered)	<p>Member of the staff who is not registered in the parish.</p> <p>The Registration Status check box should be <u>unchecked</u>.</p>
Visitor/Visitors (Unregistered)	<p>Can be used for a family that inquires at the parish, but has not yet chosen to register.</p> <p>The Registration Status check box should be <u>unchecked</u>.</p>
Alumni (Unregistered)	<p>Unregistered, former parishioner who has asked to stay on the parish mailing list for news, events, etc.</p> <p>The Registration Status box should be <u>unchecked</u>.</p>
Friends (Unregistered)	<p>Used by some parishes instead of the Contributor Only category.</p> <p>The Registration Status box should be <u>unchecked</u>.</p>

Ministry Only (Unregistered)	Used by a parish that tracks volunteers for its events who may be registered at another parish. The Registration Status box should be <u>unchecked</u> .
Other (Unregistered)	Not defined
Other Church (Unregistered)	Not defined
Unknown (Unregistered)	Not defined
Needs Status Update (Unregistered)	Not defined

Determining Family Suite database accuracy

The Family Suite manager should monitor several areas to maintain the accuracy of the parishioner database:

- Determine if duplicate parishioner records exist; the duplicate record can be merged at the request of the archdiocese administrator. See page 6 for more information on how to identify duplicate family records and how to submit a request to merge duplicate records. A future release of the software will give the duplicate-merging ability to the individual parish.
- Determine if all parishioners marked as registered did, in fact, intend to be registered at the parish as indicated by their completion of a registration form. A family continues to be registered until they inform the parish they no longer wish to be registered.
 - If a Registered parishioner (Active or Inactive) informs the parish that they have moved out of the archdiocese, their Registration Status should be changed to Unregistered and their Family Group category should be changed to Moved.
 - It is not uncommon, however, for a registered family to move out of the archdiocese without informing the parish. The parish can identify these families through a periodic mail campaign (i.e., noting which mail is returned undelivered). See page 11 for further information on mail campaigns.
- Determine if all Registered parishioners in the Family Group of Active are, in fact, considered by the parish to still be active based upon regular Mass attendance, offertory giving or participation in parish activities. If, in the opinion of the Pastor, a Registered parishioner family is no longer considered Active, their Family Group category may be changed to Inactive and the family remains Registered.

How to identify duplicate family records

Parishes can discover duplicate family records as they perform various routine tasks in Family Suite such as processing a payment or processing contact information updates provided by a parishioner. A duplicate record can be confirmed by matching birth date, birth place, address, phone, email and/or sacramental records. If there is any uncertainty regarding whether two records are duplicates, the parish should contact the parishioner to inquire if the two records in question are for the same family. Several typical examples of duplicate family records include:

- Family record which was created for an individual child when sacramental records were initially imported and the child also exists as a member of the complete family record.
- A member exists on two family records - in a child role on their parent's record and in an adult role on their own family record (either as single adult or family with spouse and possibly children).
- After being married, a woman remains on their own record with their maiden name (or as a child on their parents' family record) but also on a family record with their new husband. This duplication also exists when a payment for Religious Education classes is made using a check with the wife's maiden name, even if she has since change her name. A new record is often created because the last name is not found on an existing family record.

Format to use to submit a request to the archdiocese to merge duplicate family records

Sample format to request the archdiocese to merge duplicate records into the primary record							
Primary/Permanent record to be retained				Secondary/Duplicate records to be merged into the Primary/Permanent record			
Family Record	FamilyDUID	Member Record	MemberDUID	Family Record	FamilyDUID	Member Record	MemberDUID
Mr. & Mrs. James L. Kohler	137988	Catherine Kohler	315665	Catherine Kelly Kohler	160193	Catherine Kohler	330008
Mr. & Mrs. James L. Kohler	137988	Jim Kohler	292763	James Lewis Kohler	163465	James Kohler	333314
Ms. Kate Plumber	151213	Kate Plumber	568494	Ms. Mary Plumber	264652	Mary Plumber	555833
Mr. Mark & Mrs. Maureen Cole	188441	Mark Cole	590547	Mr. & Mrs. Mark Cole	144551	Mark Cole	311642
Mr. Mark & Mrs. Maureen Cole	188441	Maureen Cole	393985	Mr. & Mrs. Mark Cole	144551	Maureen Cole	299374

Prevent duplicate parishioner records

It is not uncommon for a parish to have duplicate parishioner records. A family name may be listed more than once in the database, e.g., one time with the correct spelling and a second time with incorrect spelling.

To prevent the creation of a duplicate record, the Family Suite manager should search for an existing record should always be performed before adding a new family or parishioner to the database. The software facilitates this search by bringing up the search screen when the Add New Family button is clicked. Records can be searched by last name, first name, and/or city.

Data entry standards

The parish should establish data entry standards to enable the parish to accurately sort, filter and search parishioner data and will also help prevent duplicate records.

For example, parishioners' formal names and nicknames should always be entered into the system in their proper fields, so the parish doesn't have duplicate records, e.g., a "James Smith" and a "Jimmy Smith." Entering both names into the proper data fields will allow the parish to use the Auto Fill feature that automatically populates the formal and informal mailing name and salutation fields when writing letters to parishioners.

The parish should also use consistent standards for entering addresses and phone numbers. For example, determine whether street abbreviations should be entered with periods (St., Ave., Dr.) or without (St, Ave, Dr).

Data missing from parishioner records

The parish can identify data missing from parishioner records by sorting on the individual data fields in Family Suite. For example, to find missing email addresses, open the Family List or Member List page and click on the E-mail Address column header in the grid. The parishioner records with missing email addresses will be listed at the top of the sort. The same sorting is available for the data fields of Address, Phone, Envelope, Birth Date, or any other column in the Family Suite.

The parish can choose how to best collect the missing information, e.g., phone call, email message, mailed postcard, etc. Alternatively, parishioners can be invited to update their information through their own profiles in My Own Church, which is included with Family Suite.

Adding Unregistered families to the parish database by copying contact information from their Registered parish

A parish can add to their database a family who is associated with the parish even if the family does not intend to be registered at the parish. For example, a parish should add to their database the families who are Contributors Only, School Only, Religious Education Only, etc.

The parish can add such families to their database by copying the family contact information from their registered parish. The parish should be careful to add the family as Unregistered. The family data is copied to the parish and the family's registration remains at their registered parish.

- Search for a family associated with the parish, but registered at another parish

Find Family

Selected Organization: Blessed Sacrament Parish, Ann Arbor

Filter by Organization: All

Last Name: Dargis

First Name: Cristina

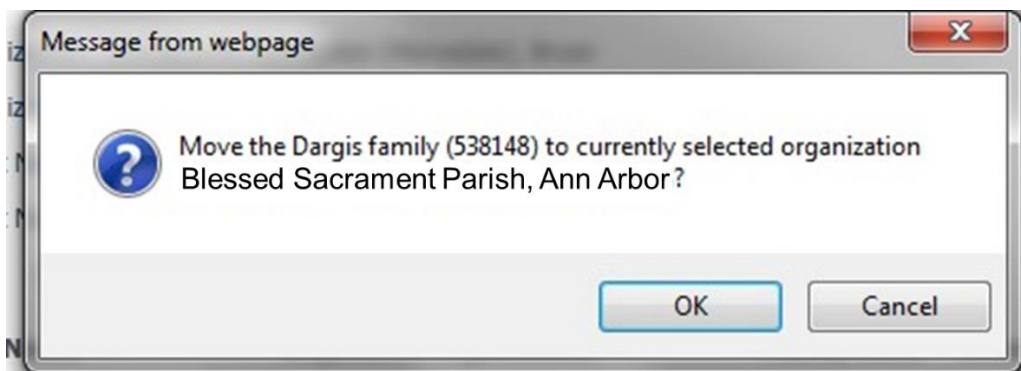
City: Westland

Search

Family Name	Registered Organization	Family DUID	Diocesan
Dargis, Cristina	All Saints Parish (Ann Arbor, MI)	104001	

Add New Family Move Selected Family As Unregistered As Registered Cancel

- Choose to Move Selected Family As Unregistered



- OK, move the family to the parish (as Unregistered so data is merely copied from the Registered parish).

Updating a family's Registration Status and Family Group

Home **Family Directory** 1 Religious Education Offering Ministry Scheduler Tuition IQ Administration

Family List 2 Member List Sacraments Family Workgroups Member Workgroups Reports

Family List All Saints Parish, Ann Arbor

Clear Search Results

A-Z A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

0-9 0 1 2 3 4 5 6 7 8 9 Filter Criteria: None Filter Column: Family Ascending Clear Filter

10 records Add New Family Delete Selected Families Quick Reports

Family	Envelope #	E-Mail Address	Primary Phone	Primary Address	City
<input type="checkbox"/> Abler, Jason and Tracey 3	6491	abler@demoemailaddress.com	555-2222	2351 Ellsworth Rd	Ypsilanti
<input type="checkbox"/> Adams, Todd and Jane	1129	adamsfamily@demochurch.com	734-621-1212	373 N Zeeb Rd	Ann Arbor

Mr. and Ms Jason Abler (100300) Env#: 6491

Family Details Member Details (5) All Saints Parish, Ann Arbor

Family Information Notes

Church of Registration: All Saints Parish, Ann Arbor

Details Modified On: Friday, May 25, 2018 1:31 PM

Family Group: Active

Registration Status: ☒

Registration Date: 3/29/2017

Unregistered Date:

Last Name: Abler

First Name(s): Jason and Tracey

Formal Mailing Name: Mr. and Ms Jason Abler

Informal Name: Jason and Tracey Abler

Formal Salutation: Mr. and Ms Abler

Informal Salutation: Jason and Tracey

Primary Address: Home Address

Country: United States

Postal Code: 48197 4855

Address Line 1: 2351 Ellsworth Rd

Edit Details 4

Mr. and Ms Jason Abler (100300) Env#: 6491

Family Details Member Details (5) All Saints Parish, Ann Arbor

Family Information Notes

Church of Registration: All Saints Parish, Ann Arbor

Details Modified On: Friday, May 25, 2018 1:31 PM

Family Group: Ministry Only 5

Registration Status: No Family Group 6

Registration Date: Organization/Business

Unregistered Date: No Surviving Members

Visitor

Active

(blank)

Inactive

Staff

School Only

Religious Ed Only

Moved

Contributor Only

Sacrament Only

Alumni

Unknown

Last Name: Abler

First Name(s): Jason and Tracey

Formal Mailing Name: Mr. and Ms Jason Abler

Informal Name: Jason and Tracey Abler

Formal Salutation: Mr. and Ms Abler

Informal Salutation: Jason and Tracey

Address: Home Address

Country: United States

Postal Code: 48197 4855

Address Line 1: 2351 Ellsworth Rd

Close

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How to run a report of Registered, Active parishioners

The screenshot shows a software interface for managing parishioner data. The 'Census' menu is highlighted in the top navigation bar. A red arrow points to the filter icon in the top toolbar. The 'Family List' section shows a search filter for 'St. Aloysius, Leonardtown'. A 'Filter' dialog box is open, showing 'Membership: Registered' and 'Family Group: Active' selected. The 'Apply' button in the dialog is highlighted. The bottom of the screen shows 'Page 1 of 47 (463 Records)'.

Family List

Filter

Membership: Registered

Family Group: Active

Send Envelopes: (Any)

Advanced Options

Exact Search: ☐

Apply Clear Cancel

Page 1 of 47 (463 Records)

Mail Campaigns to determine accuracy of parishioner data

The objective of the mail campaign is to confirm the family contact information and verify their Registration Status and Family Group category. The process and materials described below are samples from several parishes which have conducted a mail campaign.

Process steps

- Generate bulletin and Mass announcements (Example 1)
- Send a gently written letter from the pastor to the parish family requesting they complete and return the enclosed form that contains information the parish will need in order to update their database. (Example 2 & 3)
- The letter should include a date as to when the form should be returned. The letter could include a return self-addressed envelope
- The form or letter should include instructions on how to return the form (i.e. mail, collection basket, etc.)
- Phone Call | Email | 2nd Letter Follow-up should be scheduled about a month after the return date for forms not received

Example 1: SAMPLE BULLETIN AND MASS ANNOUNCEMENTS

Please help us maintain accurate parishioner records. In the near future, you will receive a letter and survey form by mail. Please fill out and return the form as soon as possible. If you have questions, please email *ContactName* at *EmailAddress* or text/call them at *PhoneNumber*.

Thank you for your continued support of *ParishName*.

Example 2: SAMPLE LETTER TO PARISHIONERS FROM PASTOR

ParishName
Parish Address
Parish City, State Zip

Date

Dear Parishioner:

Please help our parish maintain complete and accurate parish records (e.g. some records may be missing data such as current family members within the household, phone number, date of birth, verification of the sacraments, etc.). Your response will assist enable us to contact you when needed and help us to know our parishioners.

When filling out the form, please indicate if you:

- Are a Registered Parishioner
- Wish to become a Registered Parishioner
- Wish to be a Parish Friend (someone who is not registered but who is still active in the parish and resides in our system). As a Parish Friend, you are welcome to participate in all parish ministries and activities, and your contributions/donations will be available, upon request, at tax time.

Please return the completed form via the weekly collection basket, US mail to the rectory at *RectoryAddress*, or emailed to *ContactName* at [*EmailAddress*](#). If you have questions, please contact/text *ContactName* at *PhoneNumber*.

I am deeply grateful for your continued and faithful support and look forward to receiving your updated form.

Sincerely in Christ,

PastorName
Pastor

Example 3: SAMPLE SURVEY FORM

Title <i>(Circle one):</i> Mr. & Mrs. Mr. Ms. Mrs. Dr.							
Name							
Delivery Address							
City, State, Zip Code							
Phone Number				Cell Number			
Email <i>(Please print clearly.)</i>							
Participation in Parish Life <i>(Check only one of the three boxes below.)</i>							
<input type="checkbox"/> <i>Already registered/keep as a Parishioner.</i>			<input type="checkbox"/> <i>I would like to officially register in the Parish.</i>			<input type="checkbox"/> <i>I would like to be a Friend only</i>	
INCLUDING YOURSELF, LIST OTHER MEMBERS OF HOUSEHOLD							
	Full Name (First, Middle Initial, Last)	Gender	Date of Birth	Catholic <i>Yes or No</i>	Baptized? <i>Yes or No</i>	Confirmed? <i>Yes or No</i>	Marital Status <i>Married Divorced Single Widow Separated</i>
Head							
Spouse/ Partner							
Child							
Child							
Child							
Child/ Other							
Child/ Other							
Want to receive envelopes: <i>Yes No</i> Electronic Giving: <i>Yes No</i> Discontinue sending envelopes: <i>Yes No</i>							
Primary Language:				Ethnicity:			