



Archdiocese of Washington

Parish and School Financial Operations

FamilySuite Resources for the ADW Statistical Report

Our parish census and contribution system, ParishSoft FamilySuite, has a wealth of data for parishes to use in responding accurately and consistently to the ADW Statistical Report Survey. The table of contents below contains instructions to run FamilySuite reports to answer various questions on the survey.

Table of Contents

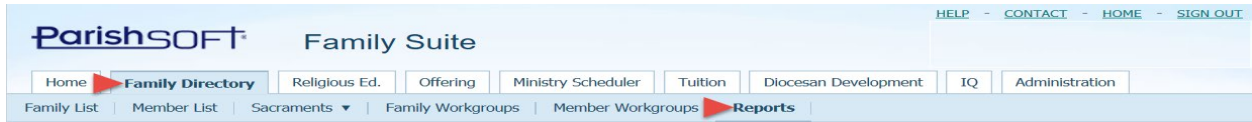
A. How to create a Parish Statistics Report	1
Questions 15-17 and 23:	1
B. How to create a member list for Widowers and Widows	3
Questions 20 and 21:	3
C. How to create a Kenedy Statistics Report	4
Questions 24-33:	4
D. How to create an ethnicity report	7
Questions 34-39:	7
E. How to create a report of Active, Registered Parishioner Families.....	9
Question 19:	9

The pastor is encouraged to designate a FamilySuite Coordinator for the parish; click to read the recommended role description posted on ADW.org.

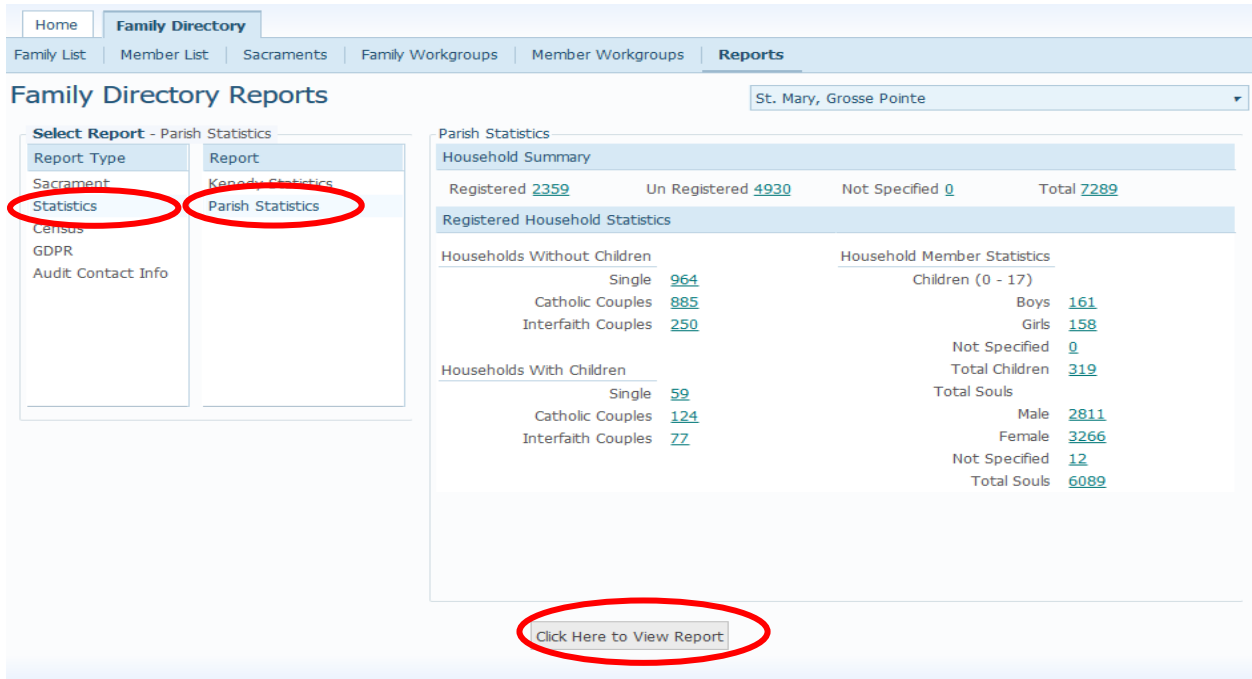
For assistance with FamilySuite, please contact Support@ParishSoft.com or the Parish and School Financial Operations team: Adrienne Willich, Executive Director, WillichA@adw.org.

A. How to create a Parish Statistics Report

Questions 15-17 and 23

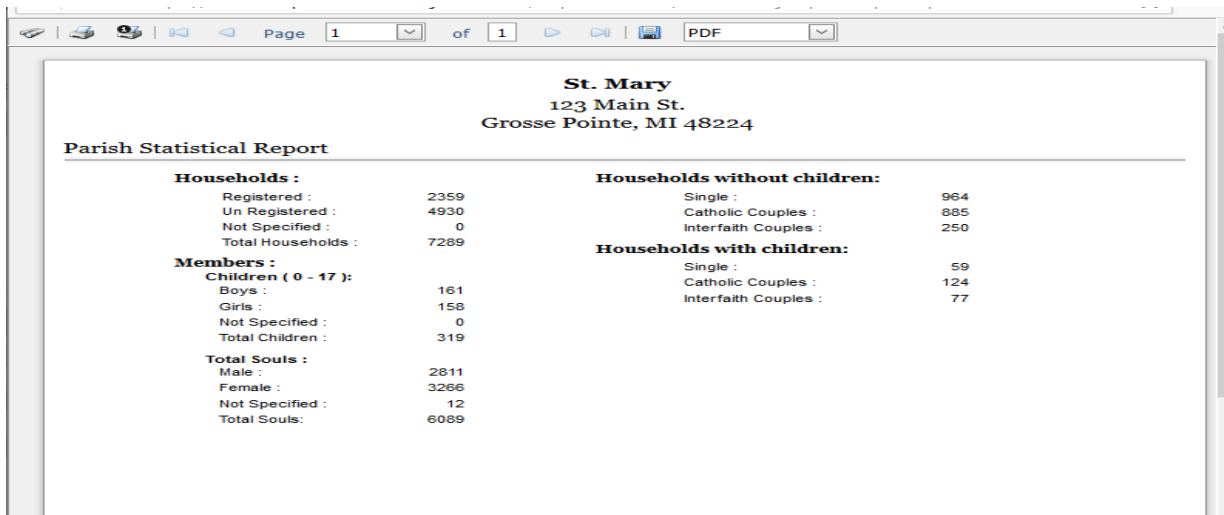


From ParishSOFT **Family Directory**, navigate to **Reports**. From the **Report Type** menu, select **Statistics**. Then, from the Report menu, select **Parish Statistics** to display data:



To view the Parish statistics report, click the **Click Here to View Report** button.

The report displays in the Report Viewer. See the example below.



Question 15: Men = Male Souls less Boys



Question 16: Women = Female Souls less Girls

Question 23: Single parent families = Households with Children, Single

The default date of the data is the day the report is created, not June 30, but should still be used to answer the survey.

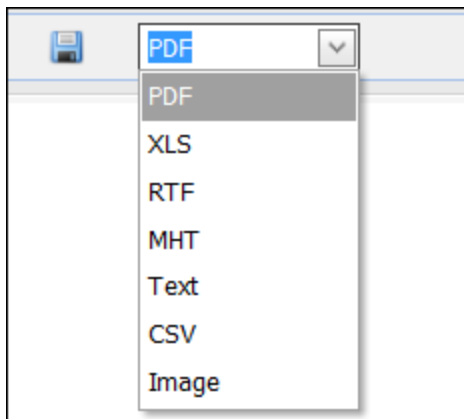
Households, Registered includes Active and Inactive registered parishioner families (see pages 10-12). Households, Unregistered represents unregistered family groups listed on pages 10-12, e.g., deceased, moved, visitor, etc.



Printing a Report

-  prints the entire report
-  prints the selected page only.

How to save a report (or export)

In the upper right corner of the Report Viewer toolbar, select the format for the report:




2. Click .
3. Select Save File. Then, click .

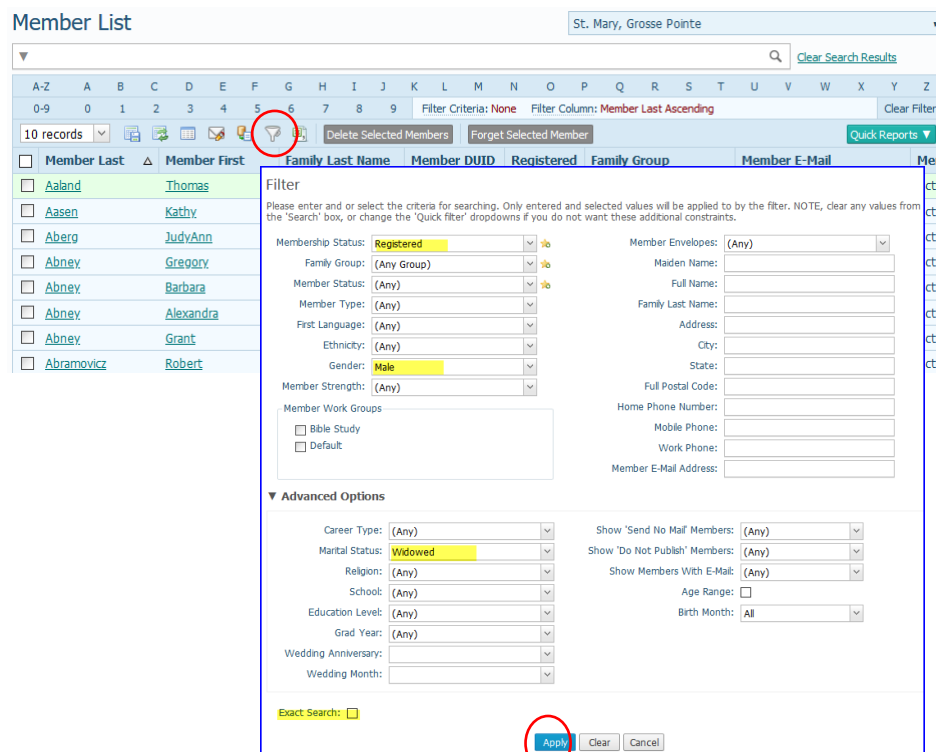
B. How to create a member list for Widowers and Widows

Questions 20 and 21:

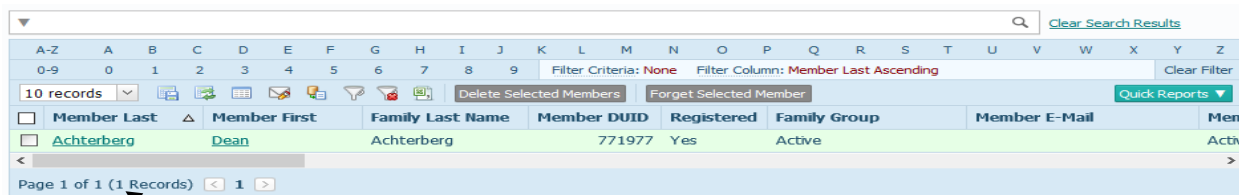
1. From ParishSOFT **Family Directory**, navigate to the **Member List**



2. Click the Filter  for **Membership Status: Registered**, **Gender: Male**, **Marital Status: Widowed** (see below).
3. Repeat with **Gender: Female**.
4. Click **Apply**



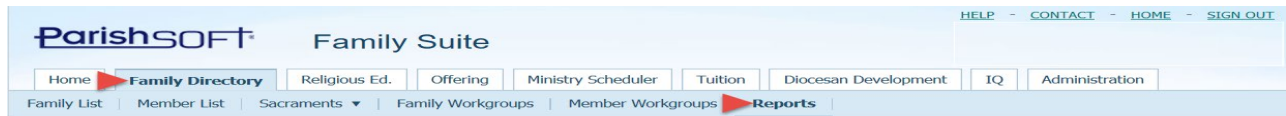
5. Questions 20 and 21 total number of records in the list.



Enter the total number of records on questions 20 and 21

C. How to create a Kenedy Statistics Report

Questions 24-33:

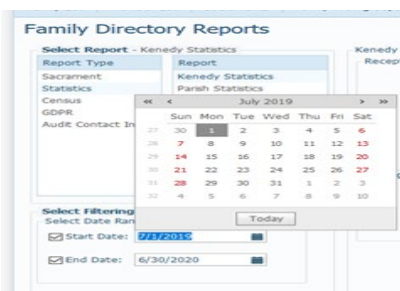


Setting Up and Viewing Your Organization's Kenedy Statistics

1. Navigate to **Reports** in ParishSOFT **Family Directory**. From the **Report Type** menu, select **Statistics** and then **Kenedy Statistics**

2. In the Select Filtering Options section, select a date range (7/1/202x-6/30/202y) for the report. To do this:

- Click the calendar button to open the calendar, as shown below.
- Select the desired date range in the Start Date and/or End Date fields.



- To view the Kenedy statistics report, click the **Click Here to View Report** button.

- The report displays in the Report Viewer. See the example below.

Christ The King Parish
825 Victors Way
Ann Arbor, MI 48108

Kenedy Directory Manager Statistical Report
Date Range : 07/01/2019 - 06/30/2020

Vital Statistics

Receptions into the Church :		Census Summary :	
Infant Baptisms (Ages 0 - 6) :	68	Registered Parishioner Households :	6936
Minor Baptisms (Ages 7 - 17) :	2	Individual Catholics :	11664
Adult Baptisms (Ages 18+) :	1	Total Deaths :	1
Not Specified Baptisms :	0	Full-Time Professional Ministry :	
Received Into Full Communion :	0	Brothers :	3
First Communiones :	5	Sisters :	2
Confirmationes :	5	Lay Ministers :	1
Marriages :		Religious Education Statistics :	
Catholic :	0	Elementary Students (K - 8) :	788
Interfaith :	8	High School Students (9 - 12) :	6
Total :	39	Total (Elem/HS) :	794
Not Specified Marriagees :	31		

The ADW Statistical Report Survey asks for Baptisms of ages < 1 year, age 1 to 7 and over age 7

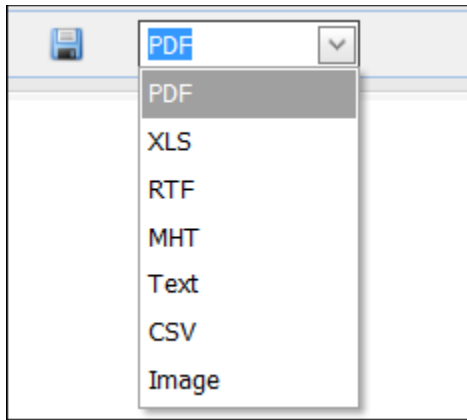
Registered Parishioner Households includes Active and Inactive Family Groups (see pages 10-12) and does not include any Unregistered Family Groups such as deceased, moved, visitor, etc.

Printing a Report


- prints the entire report
- prints the selected page only.

How to save a report (or export)

In the upper right corner of the Report Viewer toolbar, select the format for the report:

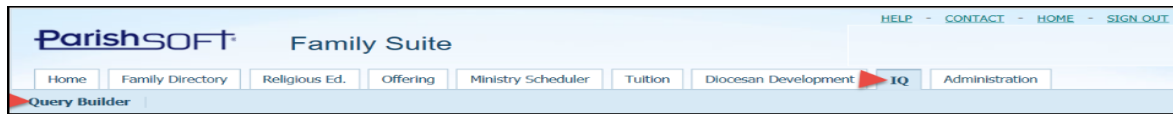


Click .

4. Select Save File. Then, click .

D. How to create an ethnicity report

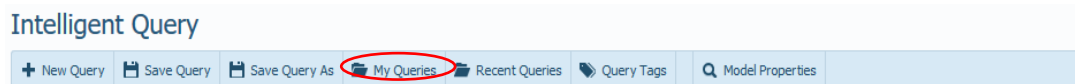
Questions 34-39:



How to open a saved query in the IQ tab

Navigate to the **IQ tab** and then **Query Builder** menu. You can open any query that you saved or any query saved by other users that they designated "Global".

1. Click **My Queries** to open the **My Queries** window.



2. Type **"Arch Dio of Washington"** in query name and click **Apply**.

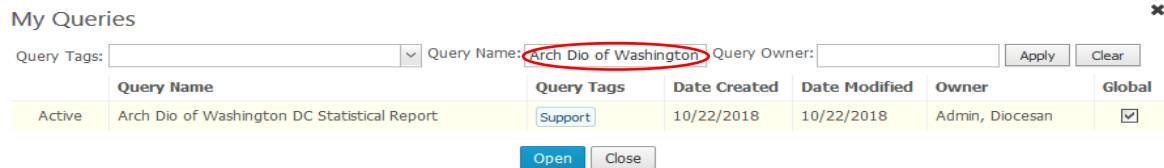
Query Tags:

Query Name:

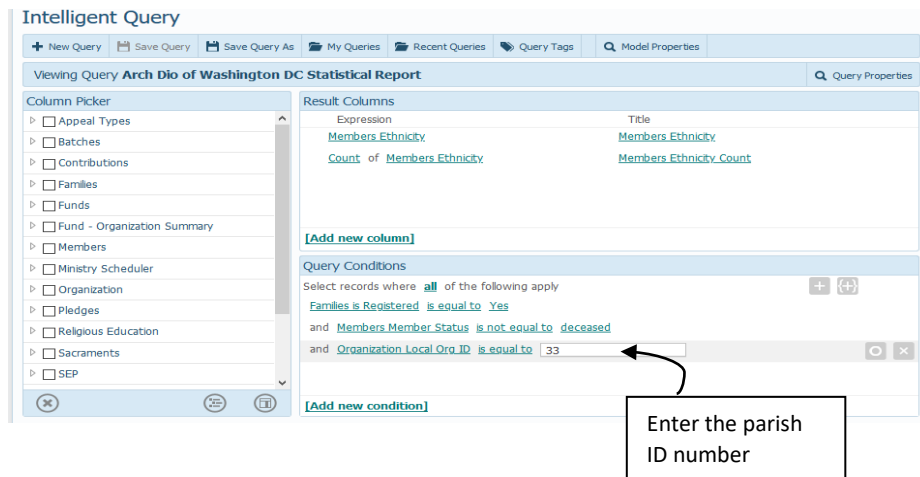
Query Owner:

Query Name	Query Tags	Date Created	Date Modified	Owner	Global

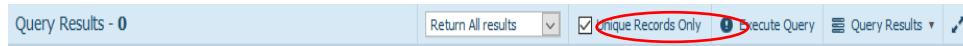
3. Select the query and then click **Open**.



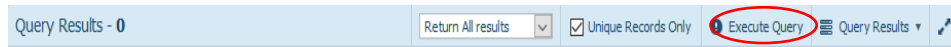
4. Details for the query are displayed on the Intelligent Query page:
Enter the parish number



- To make sure that the query results show **unique records only** (no duplicates), select the Unique Records Only checkbox at the top of the Query Results panel.



- To run the query, click **Execute Query**.



- The results of your query are displayed in the Query Results panel. The top right portion of the panel shows the number of records found that match your query criteria.

A screenshot of the Query Results panel showing a table with 8 records. The toolbar at the top indicates 'Query Results - 8', 'Return All results', 'Unique Records Only' checked, and 'Execute Query' button. The table has two columns: 'Members Ethnicity' and 'Members Ethnicity Count'.

Members Ethnicity	Members Ethnicity Count
	0
Asian	11
Black	152
Filipino	1
Hispanic or Latino	13
Other	20
Two or more races	13
White	1369

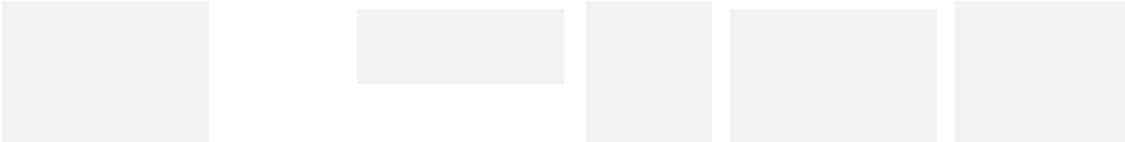
E. How to create a report of Active, Registered Parishioner Families

Question 19

The screenshot shows the 'Diocesan Suite' software interface. At the top, the 'Census' tab is selected, indicated by a red circle and the number '1.'. Below the navigation bar, the 'Family List' report is displayed for 'St. Aloysius, Leonardtown', also circled in red. A filter dialog box is open, with 'Membership: Registered' and 'Family Group: Active' selected, circled in red and labeled '2.'. The 'Apply' button in the dialog is circled in red and labeled '3.'. The table below shows a list of families with columns for name, address, phone, and parish. At the bottom, the page number 'Page 1 of 7 (463 Records)' is circled in red.

Name	Address	Phone	Parish
Allen, Matthew and Barbara	20740 Chestnut Ridge Road	301-997-0014	Leonardtown
Alton, Heather	41545 Oxen Ct	301-997-1120	Leonardtown
Alvey, Barbara	39280 Alvey Way	301-475-2091	Clements
Alvey, Lois	23582 Belmar Drive	301-475-3850	Leonardtown

4. Number of Active, Registered Parishioner Families



The difference between "Active" and other non-active Family Groups

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).

In Family Suite, 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 below 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. Parishioners are generally presumed to be Active.
- **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.

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.

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. The parishioner is never deleted from FamilySuite.

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).

If, in the opinion of the Pastor, a Registered parishioner family is no longer considered Active (based upon regular Mass attendance, offertory giving or participation in parish activities, etc.), their Family Group category may be changed to Inactive and the family remains Registered.

Definition of Family Groups

<p>Active (Registered)</p>	<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>
<p>Inactive (Registered or Unregistered)</p>	<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>
<p>Contributor Only (Unregistered)</p>	<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>
<p>Moved (Unregistered)</p>	<p>Family has moved out of the archdiocese.</p> <p>The Registration Status check box should be <u>unchecked</u>.</p>
<p>Religious Ed Only (Unregistered)</p>	<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>
<p>School Only (Unregistered)</p>	<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>
<p>Deceased (Unregistered)</p>	<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>
<p>Staff (Unregistered)</p>	<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>
<p>Visitor/Visitors (Unregistered)</p>	<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>
<p>Alumni (Unregistered)</p>	<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>
<p>Friends (Unregistered)</p>	<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