

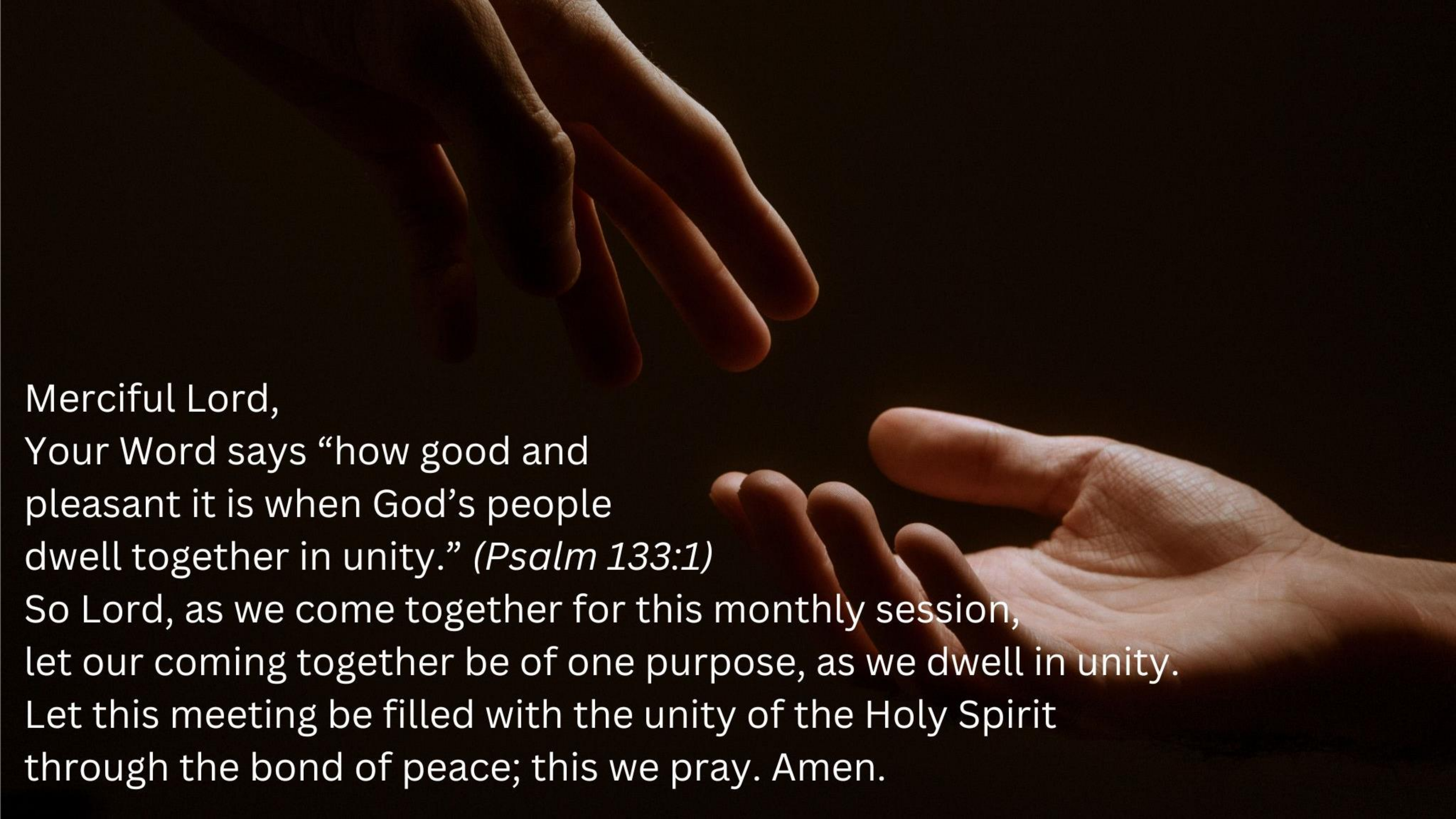
ARCHDIOCESE OF SEATTLE
PARISHIONER
ENGAGEMENT



ParishStaq™

Implementation is ending March 2024!

New Phase: Stabilization & Optimization



Merciful Lord,
Your Word says “how good and
pleasant it is when God’s people
dwell together in unity.” (*Psalm 133:1*)
So Lord, as we come together for this monthly session,
let our coming together be of one purpose, as we dwell in unity.
Let this meeting be filled with the unity of the Holy Spirit
through the bond of peace; this we pray. Amen.



Data Migration Update

- Contribution "Catch Ups"
- Middle Names
- Sacraments
- Custom Fields Migrated to Profile Fields:
 - Maiden Name
 - Envelope User
 - Ethnicity
 - Religion
 - Language
 - Family Mailing Name
 - **Deleting the Following Custom Fields** – Family Formal Salutation, Family Mailing Name, Member Mailing Name, Member Informal Salutation, Member Formal Salutation, Envelope User, Ethnicity, Religion, Language, Maiden Name
- Last Call & Backup Up Migrations



AGENDA

- ❖ ParishStaq support going forward
- ❖ Partners in the Gospel Phase Zero and ParishStaq
- ❖ Strategy Meeting & onboarding/offboarding?
- ❖ Lead ParishStaq Campus Admin?
- ❖ Host Campus?

ParishStaq™ Support:

Hover over the “?” in ParishStaq for information. Also, Look at the Help Articles in the top Right Corner of the ChMS.

Certain users can submit Help Tickets within the ChMS for technical and how-to-questions. Please coordinate within your parish to centralize ticket submission through the designated Support Contacts.

As new features in the software are released, CSM office hours will be hosted online on Tuesdays at 1 PM. These are on dependent on new feature releases and needs.

PushPay University:

<https://www.pushpayuniversity.com/>

PushPay Customer Success Manager:

Matt Feria matt.feria@pushpay.com



Support:

The Archdiocese Parishioner Engagement System ParishStaq Team (“PES Team”) will continue to support parishes by:

- Initial Strategy Meeting with Parish Family Tech Advisory Team
- Providing Role based trainings
- Continue to provide Monthly Check-ins (2nd Thurs each Month 10am)
- Continue to providing Training and Support for:
 - Annual Catholic Appeal (ACA)
 - Stewardship Campaigns
 - Cross parish duplicate profile issues
 - Data Migration issues

April 1, 2024 – new Phase: Stabilization and Optimization

All Posting within Pushpay giving, starting February 12, 2024

All Sacraments need to be entered into the ChMS going forward and retroactive to January 1, 2024 (part of the Parish Annual Report)

Permissions Management: please add and remove permissions as staff onboard and offboard.

July 2024

Partners in the Gospel:

Self-paced steps

Strategy Meeting with PES Team

Onboarding/offboarding process

...2027

Parish Family:

One canonical parish





Phase Zero: PREPARE (Now-July 2024)



Phase Zero: focuses on the current parish, in preparation for a future parish family. This is a time to assess the state of the parish and to get ready for transition. Phase 0 is for preparation with a focus on the current parish and its people. Stability is key.


Giving
\$

Migrate to Parish-Managed-Funds

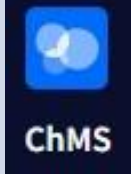
All Posting in Pushpay Giving Portal
February 2024


App Studio

Apps

LEAD APP for parish leadership

Our Catholic Community App for Parishioners


ChMS

Sacraments & Duplicates

Sacrament Tracking for all Sacraments

Continue to focus on deduping profiles within your parish

ParishStaq Overview

Phase 1: (2024-2025) Welcoming

Encounter one another, get to know one another with open minds and hearts.

- Form a ParishStaq Advisory Team
- Set onboarding and offboarding process for ParishStaq users
- Strategy Meeting with PES Team
- Select a Lead ParishStaq Campus Admin (notify PES Team)
- Focus on use of ParishStaq as a tool for Parishioner Engagement

Note: A key difference between ParishStaq in Implementation and ParishStaq in Partners in the Gospel is that the last component shared by the newly formed family will be the Giving Portal in Phase 3, whereas in implementation a key component was launching Giving Portal posting.



Strategy Meeting & onboarding/offboarding:

After July 2024 in coordination with new Parish leadership, and depending on Parish Family composition, a parish family can organize a coordinated ParishStaq/Technology advisory team. This team can be composed of multiple campus admins and others. Two key steps for the ParishStaq/Technology advisory team:

1. Meet with ParishStaq team for a strategy meeting. This meeting should take place during Phase 1.
2. Set an onboarding and offboarding checklist that ensures access to appropriate systems is set up and turned off as appropriate.



Lead ParishStaq Campus Admin: (aka Lead ParishStaq Admin)

The ParishStaq/Technology advisory team in consultation with Pastor can select a Lead ParishStaq Campus Admin and notify the PES team by emailing parishstaq.support@seattlearch.org The PES team will adjust positions and permissions for parish family staff based on the direction of the pastor and/or the Lead Campus ParishStaq Admin.

Depending on changes made, management of ParishStaq user permissions within a Parish family will be turned over to the Parish Family as soon as reasonably possible.

Lead ParishStaq Campus Admin should assign permissions early in Phase 1 to ensure timely completion of work in accordance with Parish Family planned use of ParishStaq.



General overview for Partners in the Gospel:

Permission Management

Groups & Processes

Giving

Permission Management Overview

April 1, 2024 – new Phase: Stabilization and Optimization

New cross-campus permissions requests will not be facilitated until after July 2024.



July 2024

Lead ParishStaq Admin

PES Team will facilitate initial cross-campus permission changes via form as directed by Lead ParishStaq Admin

...2027

Looking ahead:

New canonical parish formed within the system

New parish campus initially organized by PES Team and management transferred to parish



Host Campus:

After July 2024 in coordination with new Parish leadership, and depending on Parish Family composition, a parish family will have the ability to host events and groups cross-campus within ParishStaq. The parish that is the location of the event is considered the “Host Campus”.

Whenever possible, events should be coordinated out of groups and shared from the calendar of the Host Campus.

Groups and Process Queues Overview

April 1, 2024 – new Phase: Stabilization and Optimization

Some suggestions:

Become more proficient in Groups and Processes

Focus on engaging Parishioners in Groups

Consider using the My Catholic Community App to push engagement through groups

July 2024

Groups and Processes can be set up on a host campus and then shared.

For Shared groups that are cross-campus please ensure parish-family-staff members are set as leaders or assistant leaders of your shared groups.

For Shared Processes that are cross- campus please ensure parish-family-staff are set as queue managers or process managers

...2027

Looking ahead:

New canonical parish formed within the system

We will work with Parish Families to coordinate migrating groups, as necessary, from host campuses to the New Parish Campus

ParishStaq™ & Partners in the Gospel

Giving Overview



April 1, 2024 – new Phase: Stabilization and Optimization

For changes in Giving Portal Admins please contact CSM Matt Feria.

Campus Admin can also request changes via the ticket system.

July 2024

The Parish Family can assess how many payment processing vendors they are working with and whether they want to consolidate, as well as, also consider standardizing Funds/Fund Names

...2027

Looking ahead:
New canonical parish is formed within the system
The Parish Family will undergo Underwriting Process with new EIN and Giving Portal will be reconfigured.

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ParishStaq™

Questions?