



ARCHDIOCESE OF SEATTLE

PARISHIONER
ENGAGEMENT

PDS CLEAN UP

2023



Gracious God, we praise and thank you
for the Catholic Church in Western Washington.

We praise and thank you
for the women and men
who have shared the joy of the Gospel here
for more than 170 years.

Send your Holy Spirit upon us
that we might encounter your Son anew
and become more effective partners
in sharing the Good News of his saving love.

May our partnership in the Gospel
empower us to be your missionary
disciples,
bringing the Good News to all,
especially to those who are marginalized
or hurting in any way.

Give us the courage,
the flexibility and the vision
to renew parish life,
so that the good work,
begun long ago,
may continue among us,
and one day, be brought to completion
in your Kingdom,
where you live and reign
for ever and ever.

Amen.

AGENDA

- ❖ Introduce yourself - Chatterfall
- ❖ Meet the Implementation Team
- ❖ Update – Implementation Timeline
- ❖ "The Edit"
- ❖ Highlight areas to help with your PDS Clean up
- ❖ Open Q & A (focus on data clean up topics)

MEET THE IMPLEMENTATION TEAM

Our goal is to execute and support this database transition and software implementation with caution, collaboration, communication, and compassion.

ARCHDIOCESE OF SEATTLE
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Jennifer Wong – Training Specialist & Parish Support



Joseph Tancioco – Training Specialist



Ruth Reiser – Project Admin Assistant



Bryan Gummersall
Project Manager



Ed Clark – Data Specialist



Crystal Casas – Data Specialist



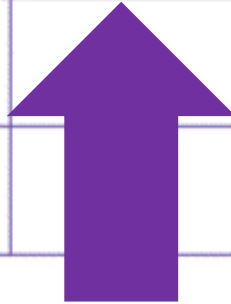
Suzanne Clark – RE Admin/
Parish Updates

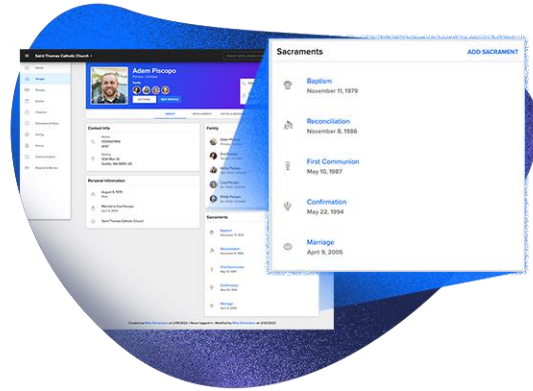


Tom Martin - CIO

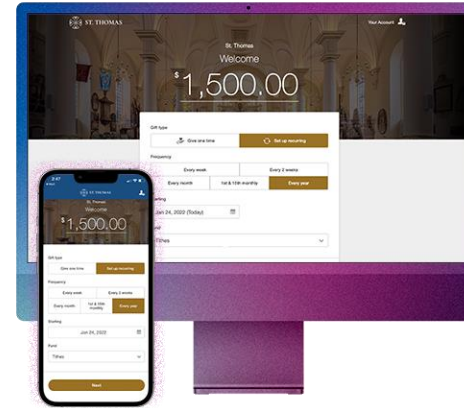
Implementation Timeline

Approach: <i>Archdiocese Command & Control w/Pilot Parishes</i>	Months 1-3 (Jul - Sep 2022)	Months 4-6 (Oct - Dec 2022)	Months 7-9 (Jan - Mar 2023)	Months 10-12 (Apr - Jun 2023)	Months 13-15 (Jul - Sep 2023)	Months 16-18 (Oct - Dec 2023)	Months 19-21 (Jan - Mar 2024)
Archdiocese + Pilot Parishes (2)	Initial Data Migration + Key Decisions	Software Impl, Training + Deployment	Wrap Up + Final Data Phase	Co-delivering trainings w/Pilot Parishes' SMEs + Retrospective for future Waves			
Waves 2 & 3		Orientation + Initial Data Migration	Software Impl, Training + Deployment	Wrap Up + Final Data Phase			
Waves 4 & 5			Orientation + Initial Data Migration	Software Impl, Training + Deployment	Wrap Up + Final Data Phase		
Waves 6 & 7			We're here	Orientation + Initial Data Migration	Software Impl, Training + Deployment	Wrap Up + Final Data Phase	
Waves 8 & 9					Orientation + Initial Data Migration	Software Impl, Training + Deployment	Wrap Up + Final Data Phase
Waves 10 & 11					Orientation + Initial Data Migration	Software Impl, Training + Deployment	Wrap Up + Final Data Phase

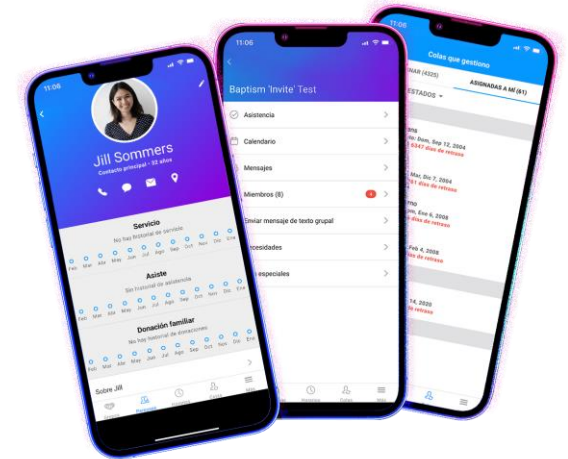




ChMS
Church Management System



Giving Portal



Apps: Lead and Parishioner

Suite of e-tools



THE HOME EDIT

- ❖ Edit
- ❖ Categorize
- ❖ Contain
- ❖ Maintain



THE PDS EDIT

Like these home organizing processes, the journey of transitioning your parish or faith community successfully to the new data management system depends highly on your INITIAL EDIT (clean data).

- ❖ Edit – *Age has privilege, Family Status Field, and Where to focus in PDS*
- ❖ Categorize – *Shared vs. Specific*
- ❖ Contain – *ParishStaq by Pushpay*
- ❖ Maintain – *Another C word*

EDIT – AGE HAS PRIVILEGE

During the period prior to your parish and faith community's migration to the new platform, data must be filtered and organized within PDS. See videos and written instructions on our Learning and Implementation Site

- ✓ Edit – *Age has privilege*
Edit - *Family Status Field*
Edit - *Where to focus in PDS*

Categorize – *Shared vs. Specific*

- ✓ Contain – *ParishStaq*

Maintain – *Another C word*

? Which data is being brought over? ?

Visit our Learning and Implementation Site

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HOME IMPLEMENTATION TRAINING COMMUNICATION PROJECT FAQs MEET THE TEAM CONTACT US



aosparishionerengagement.weebly.com

Navigate to Implementation

ARCHIVES POLICY

 Which data is being brought over?

525 DEVELOPMENT & FUNDRAISING

The activity of soliciting and gathering contributions of money and/or other resources through capital campaigns, auctions, fundraising events, special collections, and estate planning.

SERIES NO.	SERIES/TITLE DESCRIPTION	RETENTION	DISPOSITION
PS525-25	DONATION RECORDS	Calendar year + 6 years (2016 and older can be deleted)	SHRED/DELETE
PS525-30	DONATION SUMMARY REPORTS	Calendar year + 6 years (2016 and older can be deleted)	SHRED/DELETE
PS525-35	DONOR DATABASE RECORDS – Includes: contact information, demographic information, educational and business information, how donators wish to be recognized, donation amount, history of gifts, attendance at activities, as well as other attributes relevant to the donator's relationship with the Archdiocese of Seattle.	Calendar year + 6 years or obsolete or superseded, whichever is longer (2016 and older can be retired)	DELETE
PS525-40	FUNDRAISING GOAL WORKSHEETS	Calendar year + 6 years (2016 and older can be deleted)	SHRED/DELETE



EDIT – AGE HAS PRIVILEGE
Consult the retention schedule.



ARCHDIOCESE OF SEATTLE

**PARISHIONER
ENGAGEMENT**

DONOR DATABASE
RECORDS PS525-35



- 2011**
- 2012**
- 2013**
- 2014**
- 2015**
- 2016**

This data can be retired.

? Which data is being brought over? ?

ARCHIVES POLICY

100 ADMINISTRATION MANAGEMENT

The function of administering parish programs, offices, boards, groups, and events.

SERIES NO.	SERIES/TITLE DESCRIPTION	RETENTION	DISPOSITION
PS105-15	PARISHIONER REGISTRATIONS	If using paper registration forms for data entry into Parish Data System (PDS), then paper forms are transitory and electronic data is permanent. If paper forms are sole proof of parishioner registration: Permanent	PARISH ARCHIVES

Parishioner Registration is a PERMANENT part of Parish Archives.
We DO NOT delete electronic Parishioner Registration records.

This webinar is intended to give an overview of "how to clean" (format) your PDS Church Office data for migration to the new software. It is not intended to instruct or interpret questions related to the archival policies of the Archdiocese of Seattle. For these questions, please contact Seth Dalby.

seth.dalby@seattlearch.org

Retention Schedule

Records Policies and Resources for Parishes and Archdiocesan Schools

- <https://archseattle.org/or-parishes/parish-archives-and-records-management/>
- [Parishes Records Retention Schedule2021-12-14.pdf \(archseattle.org\)](#)



Retention Schedule for Parishes & Faith Communities	+
Retention Schedule for Archdiocesan Catholic Schools	+
Archives and Records Management Policies	+
Scanning Policy for Archdiocesan Staff and Volunteers	+
Filing Guidelines	+
Records Destruction Form	+
Guidelines For Managing the Electronic Records of Separated Employees	+

EDIT - FAMILY STATUS KEYWORD: ARCHIVE FOR DELETION

When data migration takes place, you will have the choice as to which families and members you want to migrate.



Archived for Deletion

Non-Registered

Organization

Registered

Sacrament Only

~~Visitor - In State~~

Visitor ~~- Out of State~~

Visit our Learning and Implementation Site

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HOME IMPLEMENTATION TRAINING COMMUNICATION PROJECT FAQs MEET THE TEAM CONTACT US



**Navigate to Implementation | Migration and
Data Preparation | Family Data Clean up**

Consider marking families and members you do not want to migrate with the ***Archive for Deletion*** family status keyword. This will make it easier when we move the data.

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PARISHIONER ENGAGEMENT

HOME

IMPLEMENTATION

TRAINING

COMMUNITY

PARISH SURVEY (PRE-
WAVE)

PARISH TIMELINE >

MIGRATION
PLANNING AND DATA
CLEANUP >

FAMILY DATA
CLEANUP

MEMBER DATA
CLEANUP

CONTRIBUTION DATA
PREPARATION

Learning



EDIT – Family Status Field



Participant/Non-Registered
Organization
Registered
Sacrament Only
Donor Only
Visitor

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DATABASE RECORDS
Family Status Field marked

Family Status Field marked



**Archived
for
Deletion**

? Which data is being brought over? ?

EDIT - WHERE TO FOCUS IN PDS

Is the data being migrated in a format that makes a clean migration possible?

- ✓ Edit – *Age has privilege*
- ✓ Edit - *Family Status Field*
- ✓ *Edit - Where to focus in PDS*

Categorize – *Shared vs. Specific*

- ✓ Contain – *ParishStaq*

Maintain – *Another C word*

FAMILY

Family Keywords

Family Status Keywords

At least one Head of Household

FUNDS

Consolidate 2017-2019 (single total)

"Retire" earlier than 2016

MEMBER

Keywords

Relationship to Head of Household

Contact information: phone and email

Sacramental information: place, celebrant, date

Ministries and Talents

EDIT - WHERE TO FIND INSTRUCTIONS AND VIDEOS



FAMILY

Family Keywords

Family Status Keywords

At least one Head of Household

MEMBER

Keywords

Relationship to Head of Household

Contact information: phone and email

Sacramental information: place, celebrant, date

Ministries and Talents

FUNDS

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EDIT - WHERE TO FOCUS IN PDS

Is the data being migrated in a format that makes a clean migration possible?

FAMILY

Family Keywords

Family Status Keywords

At least one Head of
Household

✓ Family Keywords:

1) What can be deleted; 2) Define those that remain; 3) Shared/Unique

✓ Family Status Keywords:

About the relationship the family has to your parish/faith Community – conform to picklist

✓ Of all the families that you want to bring over do they all have at least one member per household?

EDIT - WHERE TO FOCUS IN PDS

Is the data being migrated in a format that makes a clean migration possible?

MEMBER

Keywords

Relationship to Head of Household

Contact information:
phone and email

Sacramental information:
place, celebrant, date

Ministries and Talents

- ✓ Member Keywords:
 - 1) What can be deleted; 2) Define those that remain; 3) Shared/Unique
- ✓ Since ParishStaq is a Member organized database your records must have a phone and email on all members
- ✓ Ensure that the Head of Household is labeled and that all other members in the record are labeled according to their relationship to the head of Household
- ✓ This is an opportunity to look at your Ministries, Talent lists and update them

EDIT - WHERE TO FOCUS IN PDS

Is the data being migrated in a format that makes a clean migration possible?

FUNDS

Consolidate 2017-
2019 (single total)

"Retire" earlier than 2016

- ✓ Consolidate amounts, i.e. a family gives monthly so they would have 12 transactions per year – by consolidating you will only have one transaction for the year. This is currently for years 2019, 2018, 2017
- ✓ Per archive policy – donation information can be “retired” in accordance with the disposition outlined in the policy if it is 2016 and earlier.

- ✓ Edit – *Age has privilege*
- ✓ Edit – *Family Status Keywords*
- ✓ Edit- *Where to focus in PDS*

- ✓ Categorize – *Shared vs. Specific*

- ✓ Contain – *ParishStaq*

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The Implementation Team's goal is to execute and support this database transition and software implementation with caution, collaboration, communication, and compassion.

ANOTHER C FOR CULTURE

OPPORTUNITY

- Replacement of our Legacy Church Office Software: PDS, ParishSOFT, FellowshipOne, eTapestry, Excel/Access
- Moving our Data to a “hosted” Solution
- Providing Parishioners an Interactive Community where they can access their information and engage

CHANGE IN CULTURE

A different type of conversion experience

- ❖ Most parish leaders didn't go into ministry with the goal of leading a faith community through a complete overhaul in data systems.
- ❖ Think back to your discernment to ministry. Why did you answer the call? What has inspired you the most?
- ❖ How can you bring about a change in Culture in your faith community to support the implementation of this new software?
- ❖ Who am I to lead this type of initiative in my faith community?

Change in Culture
requires transition management

Change Management

VS.

Transition Management

Leaders manage change successfully
Successful Leaders manage the transitions



The Difference Between a Change and a Transition

CHANGE

New pending circumstance

When you focus on only managing the change (the result), you do not have any impact on Culture.



TRANSITION

Emotional, psychological, and spiritual adjustments

*When you manage transitions, you **RECOGNIZE** and support the emotional, psychological, and spiritual needs of your community.*

Unmanaged transitions make changes unmanageable.

CONVERSION

Role Models for Transition Management

- Moses (Exodus)
- Saint Mary of the Cross
- Jesus (Emmaus)

Invitation: Look up one of these Role Models. Reflect on how Transition Management was handled and reflect upon these questions:

Instead of asking who am I to lead this change?

Ask yourself how will I manage the transition?

Who do I need to share this work with, and information about the process?

CHANGE IN CULTURE

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Support:

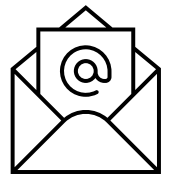
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Monthly meetings (2nd Wednesdays at noon)



Website: Learning and Implementation Site



Email: parishstaq.support@seattlearch.org

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Q & A

on Data Cleaning