Highlights from the 2019 Fall Roundtables.

- Roundtable [slides and agenda](#) are available for review online.
- As usual, the roundtable sessions opened with an opportunity for staff to ask questions and raise topics. Among topics and questions raised were the following:
  - There were various comments regarding the Annual Report to the Bishop such as parish census questions, parish boundaries and how the statement of spiritual statistics is not well defined. Data is gathered differently from parish to parish and year to year which likely yields inconsistent results.
  - Should asbestos contacts at the parish be listed in ParishSoft?
  - Parish schools have been added as Organizations in ParishSoft. Parish school staff members should be listed under the parish.
  - How should school children be noted in ParishSoft so that their records can be efficiently reported out?
- There were also a number of observations and requests.
  - It was suggested that the Bishop's Advent Prayer Request phone call should not be routed to Work Phone numbers. This year and going forward Work Phone numbers will be removed from the call list.
  - It was suggested that people might see the pledge card for the Diocesan Annual Appeal letter if it was at the top, or on a separate card.
  - Advice was sought on choosing best in class multi-channel communications software (text, email, web, social media) such as Evangelus, Flocknote or ParishSoft (ParishCast). Which is best for parish use? It was agreed that curia offices should investigate various solutions for a possible recommendation to the parishes.
  - Shared media resources such as event promotion images, bulletin inserts etc. found at diolc.org/media-resources should be high quality, timely and readily accessible.
- Catholic Cemetery Conference 2019 will be held Wednesday, October 23 at Holy Cross Diocesan Center. Parishes with a cemetery are encouraged to [register](#) and attend.
- Sister Donna Krzmarzick shared statistics on the improved quality of mailing records, showing that undeliverable addresses have been reduced from 3,438 to 664 since 2015. Please continue to help update and maintain accurate address records.

- The newest version of the Parish Census Software [Standard Operating Procedures](#) (SOP), dated 10-1-2019, is available for download. The new SOP contains
    - Standards for the recent update of parish Staff records to the Staff only Family group. Handouts included a printout for each parish of the Staff roster with recorded values for Formal Mailing Name, Family Group, Registration, Member Type and Member Status. Standards include that Family Group should be "Staff only", unregistered, MemberType "Head" or "Adult", Member Status "Inactive". Staff records with non-standard values were highlighted on the printouts. Parish staff are requested to update those records to standard values as necessary.
    - Instructions for [Export to New Family](#) button. Margot Lorraine led a discussion of why parishes are encouraged to move adult children (aged 22+) into their own, new, Family record. This is particularly important with upcoming changes in Raiser's Edge. In the near future all Active, Registered Member records in ParishSoft will be replicated into Raiser's Edge. It is import to transfer accurate data. Please use the Export to New Family button to move adult children (aged 22+) into their own Family. Notes about Export to New Family from the SOP follow.
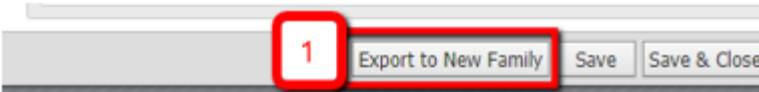
A popup message "Would you like to use the existing family's address as the address for the new family?" Select Yes or No. The Add New Family screen appears, populated with data for the new Family record and its corresponding, previously populated Member record.

> **!** Last Name, Email Address, Family Group and other fields in the new Family record will be populated with corresponding values from the origin Family. Some values, such as Last Name, Email Address and Family Group may not be appropriate for the new Family. Edit inappropriate values as needed.

Export to New Family removes the Member record from the origin Family while retaining all Member data including Sacraments. The transaction:

- Generates a new Family record and new Family DUID.
- Registers the new Family record at the recording parish.
- Documents the export transaction in Family Notes tab on both the new and the origin Family record.
- Notifies the origin Family parish of registration about the Member export.

    > **!** Other parishes associated with the Origin family do not receive notification.

- Jack discussed ways to help parishes and the diocese use social media.
    - Parish social media contacts are encouraged to join the Diocese of La Crosse Social Media Group, shown below.
    - Both Facebook and Google automatically generate pages for most Catholic parishes displaying images, maps and entries from people interacting with the page. These pages are "unofficial" until claimed. Your parish is encouraged to search for and claim all

social media pages naming your parish. Claiming your parish page can help protect your parish's online presence from unauthorized and potentially malicious harm. For help claiming your online pages reach me at the contact information listed below.

- o Crossposting Videos, and Co-hosting Diocesan Events on Facebook were topics added to the Diocese of La Crosse Social [Media Resources](#) (the blue whale book) last Spring, as revised 28March2019. Our total Facebook audience reach is about 13,000 users for all parishes. If you have not done so already, please enroll your parish to crosspost and co-host diocesan videos and events.
- The longer, 4.5 hour with lunch meeting format was well received and will be used again going forward.
- Save the dates! Spring Roundtables are scheduled April 22-23 and April 29-30th. We will provide exact locations, an agenda and other particulars in February, 2020.

Have a blessed Fall.

Best regards,
Nick

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