

Phase 1 Check List

Parish Family:

Completed by:

Liaison:

Assumptions

- Planning will be done to ensure a smooth transition for parishioners
- The important rituals and activities for parish identity will continue.
- Continuous communication within the parish community should be ensured.

Activities		Date to be completed	Actual Completion	Notes
<input type="checkbox"/>	Change underwriting for electronic payment system (e.g. PushPay) to include pastor's name	July 2024		
<input type="checkbox"/>	Add pastor's name to bank account	July 2024		
<input type="checkbox"/>	Determine incoming pastor's email and archive prior pastor's email and files	July 2024		
<input type="checkbox"/>	Align parish and school calendars	Sept. 2024		
<input type="checkbox"/>	Determine pastor's "administrative assistant"	Sept. 2024		
<input type="checkbox"/>	Create parish family banners for each of the physical sites	Sept. 2024		
<input type="checkbox"/>	Update parish websites to note their new parish family configuration (with links to other websites)	Sept. 2024		
<input type="checkbox"/>	Determine plan for sharing/unifying bulletin content across the parish family	Sept. 2024		
<input type="checkbox"/>	Determine pastors "base(s) of operations"	Sept. 2024		
<input type="checkbox"/>	Establish parish / school alignment / collaboration / operating norms	Sept. 2024		
<input type="checkbox"/>	Coordinate school liturgy times across parish family	Sept. 2024		
<input type="checkbox"/>	Determine point for family shared expense oversight	Sept. 2024		
<input type="checkbox"/>	Discern how multiple finance councils / pastoral councils will be managed	Sept. 2024		
<input type="checkbox"/>	Determine who on staff can assign and approve tech security roles and inform Chancery IT of this contact.	Sept. 2024		
<input type="checkbox"/>	Ensure appropriate staff have QuikBooks, QVinci, and Paycom permissions	Sept. 2024		

Activities		Date to be completed	Actual Completion	Notes
<input type="checkbox"/>	Ensure at least 2 staff people have admin access to all family websites and social media channels	Sept. 2024		
<input type="checkbox"/>	Host a school leadership meet-and-greet	Sept. 2024		
<input type="checkbox"/>	Host initial welcoming events at each parish	Sept. 2024		
<input type="checkbox"/>	Begin forming Family Leadership Team	Sept. 2024		
<input type="checkbox"/>	Host a staff and Consultative Leadership retreat	Dec. 2024		
<input type="checkbox"/>	Determine what payment processors are used within family and potential for movement to one platform	Dec. 2024		
<input type="checkbox"/>	Invite existing ministers (e.g. ushers, catechists) and parish groups (SVdP, KOC) to shared, cross-family events based on ministry	Dec. 2024		
<input type="checkbox"/>	Host a shared family service project	Dec. 2024		
<input type="checkbox"/>	Hold family-level small group gatherings for Advent	Dec. 2024		
<input type="checkbox"/>	Determine potential shared ministries and expenses	Dec. 2024		
<input type="checkbox"/>	Review parish property report and identify short-term property/facility needs	Mar. 2025		
<input type="checkbox"/>	Begin coordinating understanding and communications around school support for coming school year	Mar. 2025		
<input type="checkbox"/>	Discern how to fill DOO / DPM role	Mar. 2025		
<input type="checkbox"/>	Create an initial Parish Family Advisory Council	Mar. 2025		
<input type="checkbox"/>	Engage entire family in shared liturgical events	Mar. 2025		
<input type="checkbox"/>	Organize One Parish Plan (OPP) planning process	Mar. 2025		
<input type="checkbox"/>	Create a financial "Family Report" around past FY fundraising	Mar. 2025		
<input type="checkbox"/>	Create an Intra-Family Hospitality Plan	June 2025		
<input type="checkbox"/>	Hold family-level small group gatherings for Lent	June 2025		
<input type="checkbox"/>	Begin reviewing social outreach and pastoral care opportunities	June 2025		
<input type="checkbox"/>	Perform some review (formal or informal) of existing parishioner demographics	June 2025		
<input type="checkbox"/>	Initiate One Parish Plan "Who We Are" work	June 2025		
<input type="checkbox"/>	Participate in family-wide 175th anniversary events	May - Aug 2025		

