



Data and Technology Sharing

Before starting to explore data and technology sharing, it's important to note a few key elements:

- Parish families will continue to operate separate bank accounts and financial statements until they become one canonical parish.
- Each parish in the parish family remains a parish until becoming one new canonical parish. This means that parish identities and identification numbers stay the same. They will be associated with a new parish identity and number. When the family becomes one canonical parish, then new parish numbers will be provided.

Actions

This first step when approaching data and technology is to identify who on staff at the parish family can assign and approve security roles for the rest of the staff and inform the Chancery IT team at parishstaq.support@seattlearch.org. (**Tech Admin Lead**) This Parish Technology Admin lead should assign appropriate permissions early in Phase 1 to ensure work can be accomplished in a timely manner – and then update the onboarding and offboarding checklist to ensure access to systems is set up and turned off as appropriate.

Here is an overview of key systems to consider:

- **ParishStaq**
The ParishStaq team will adjust positions for parish family staff based on the direction of the Admin Lead. Cross-parish groups can be created by selecting a lead parish as the main campus for the group. Parish families will have a choice of whether to keep the parishioner app at the existing parish level or to create a new parish family app_presence.
- **Payment processing**
Parishes should assess how many payment processing vendors they are working with and whether they want to consolidate. It may be a good time to consider moving to PushPay, which is integrated with ParishStaq and will become more familiar to everyone across the archdiocese.
- **Quickbooks**
Parishes will need to give Quickbooks and QVinci permissions to the appropriate staff. Training on how to do consolidated reporting with QVinci is recommended. Additionally, everyone should use the standard chart of accounts which will make reporting simpler.

As parishes become one canonical parish, they will need to inform Tech Soup, which is the third

party many parishes use to purchase software. In addition, parish families will need to work with Intuit to establish a new Company File Account, after receiving new EIN. They can be reached at 800-446-8848.

- **Microsoft 365/email/calendaring/file sharing**

When it comes to these daily office tools, there is no need to make immediate changes. Here are few things to keep in mind:

- It is fine to keep the same domain name for email addresses.
- The technology we anticipate people will need first are tools for calendaring and file sharing. How to go about implementing these tools depends on which systems each parish has as the starting point. For example, parishes on the shared tenant will have no problem sharing calendars and files.
- Parishes with a mixed environment of shared tenant and other tenants will need to set up the shared tenant as the primary calendar, and the other tenants will be invited as guests.
- Parishes with no member parish on the shared tenant will need to work with their local IT support to create the desired sharing environment or consider moving the entire family to the shared tenant.
- Now would be good time to archive and purge old documents and emails in accordance with the Archdiocesan Records Policy.

Websites/domain names

Parish Admin Leads need to determine the domain names that are used, who owns them and who has credentials to them. A minimum of two parish staff must have admin access to all the websites and social media channels. While volunteers may have access to these, the staff must have the ability to control these channels.

Websites should be updated to recognize the other parishes in the family and provide links to each. Over time, content should evolve to showcase shared events, liturgies available across the family, and more.

Planning for a single new website should not begin until the parish family becomes one canonical parish.

Infrastructure (including network hardware, servers, and cloud services)

Infrastructure at each parish can remain independent indefinitely. Cost savings, shared management or other simplifications may be a reason to consider standardization or consolidation. Please consult with your location technical support staff person or vendor.

Other applications

Phones, physical security, and cameras can all remain independent. Cost savings or shared management may make sense to consider standardization and changing permissions.

Schools Student Information System

Families with more than one school might want to consider standardizing the Student Information System. However, this work should not start until the disposition of the schools are determined. There may be several opportunities for consolidation across schools. For example, if more than one school in the family has Chromebooks, then consolidating the G-Suite tenant in the future may make sense.