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## D A T A   B A S E   M A N A G E M E N T

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Despite advances in modern technology and mass communications, the average parish leader often has limited awareness of the diversity among parish membership. Extensive and frequent geographic mobility, changing demographics, and indifference toward the issue of parish registration all contribute to the enormously complex responsibility of parish recording keeping. A well-planned parish census can provide the parish with accurate information and awareness about:

- ◆ Important statistics concerning members and up to date addresses and phone numbers
- ◆ Pertinent knowledge about the concerns and issues of members
- ◆ Essential sacramental information
- ◆ Parish demographic trends
- ◆ Information about which parishioners are active and those who are not currently active or are alienated

All of this information will help a parish to better identify needs, meet those needs and communicate with specific groups of parishioners (e.g. families with young children). This database will also provide for effective mailings to all Catholics in the parish and will provide a tool for identifying potential contributors of time, talent, and financial resources.

A parish census can also offer opportunities for evangelization and parish pastoral planning. The Office of Pastoral Planning can help you to discover what type of census will best meet your present needs.

Even if you decide that a full census is not practical, a parish should attempt to update its records concerning parishioners on a regular basis and utilize the latest computer software to allow for the most effective use of this information. The following information will help you to decide what factors are important if you are considering updating your computer software to provide more accurate information about your parishioners.

### ***How to pick a database management system***

Ideally, your computer database system will be able to function to provide ministry, census and financial information. The census information would include information on each family member such as name, address, telephone numbers, sacramental history, age, race, sex, marital, and school or level of education attained. The ministry information should include time and talent involvement, both present and past, and skills and interests. The financial information would include information on specific giving, broken down by year and fund. The financial information would also include the normal accounting information, which would be useful for a finance committee in preparing a budget and for year-end reports to the Diocese and parishioners.

***Essential aspects of any system:***

- ◆ The system should be able to accommodate data for census, ministry and financial purposes
- ◆ The system should be able to generate reports in a variety of formats, to print labels, and to merge with other systems,
- ◆ The software provider should provide unlimited services, ideally including monthly maintenance, periodic updating, telephone support, and training opportunities
- ◆ The system should be compatible with your present system, or should have the ability to import current data

***Essential aspects of the ministry and census system:***

- ◆ The system should allow you to create a variety of lists based on specific demographic categories, e.g.: young families, over 65, under 30, etc.
- ◆ The information should be exportable to spreadsheet
- ◆ The system should provide the ability generate individual letters, reports and/or labels.
- ◆ The system should allow the creation of lists based on volunteer ministry
- ◆ The system should allow for the creation of an experience profile for each person including past and present involvement, skills, key talents such as language, accounting, etc., and interests.

***Essential aspects of the financial system:***

- ◆ Ability to generate reports of weekly, monthly, quarterly and yearly giving
- ◆ Ability to generate letters to parishioners with reports of financial giving
- ◆ Ability to spread the budget throughout the fiscal year using last year's experience
- ◆ Ability to account for individual program budget and expenses (allows for recording income and expenditures by parish program)
- ◆ Ability to export accounts and data to a spread sheet
- ◆ Ability to segregate reporting for separate funds

***How to get started:***

1. Review current system and determine basic computer capability, including whether the system will be networked.
2. Call the Diocesan Finance office for information and suggestions.
3. Meet or talk with at least three other parishes that are using different systems and review the checklist above with them.
4. Decide who will be responsible for data entry and who will keep the records current. Consider whether you will need to hire an individual who will be responsible for census records. This position could be part-time and could be the other half of a Volunteer Ministry coordinator position. The Pastoral Planning Office has more information on the creation and need for a Volunteer Ministry position.
5. Decide who will have access to the records and if there will be some restrictions on access. This is especially relevant in a networked system.
6. Budget money for installing the system, for training and for continuous updating.