

Parish Mailing List Updates

The development of a comprehensive annual giving program like the Annual Pastoral Appeal can be a daunting task. The most important part of its success is identifying potential donors and acquiring their contact information in order to prepare personalized direct mail packets parishioners receive at home.

Each parish has been assigned to a member of the Campaign Processing Office staff, and any issues regarding parishioner address information should be brought to their attention. They have each been in contact with a representative at their assigned parishes to discuss current status, updates and share notifications their office receives from parishioners. **If you have any questions concerning the last time an updated was made, please contact the Campaign Processing Office at 727-341-6841.**

Regular Updates

The address information we have for your parishioners is what you provide us and is what will be used for APA mailings on behalf of your parish. In the last year, we discovered through first class mailings completed to assist some parishes during shutdowns and with offertory efforts for 21 parishes, we utilized first class mailings instead of the traditional bulk mailings with the Annual Pastoral Appeal.

Through the process, the US Post Office informed us of incorrect, inaccurate and inconsistent addresses in excess of 3,500 for a mailing of 25,000. This equated to a 14% returned mail rate and wasted postage of more than \$2,000. This mailing was completed for 21 out of 79 parishes. What if we had completed the mailing for all parishes?

Updates to the diocesan mailing list should be completed monthly.

- ***If you have not recently done so***, please update your parish mailing information so that the upcoming mailings from the bishop and your pastor will reach all of your parishioners.
- ***If your parish is not on ParishSOFT***, please use the Family Suite program to share the additions, deletions and corrections of your parishioners' mailing information every month.

Consistency is Crucial

When making changes, there are specific formats, fields and processes which must be addressed, enabling a consistent data pull and correct information for parishioners in their mailed pieces.

Updating Member Information –

- Complete all variations of salutation fields in the Family Detail tabs including:
 - Formal Mailing Names
 - Informal Names
 - Formal and Informal Salutations
- Do not use all upper-case letters. While the US Post Office recommends this for outer envelopes, it makes utilizing data for any other purpose such as personalized letters, emails and communications difficult and time consuming.
- Use USPS standard abbreviations and punctuation outlined at
https://pe.usps.com/text/pub28/28apc_002.htm
- Use Prefix/Title/salutation abbreviations as follows:
 - Mr. - Mr. and Mrs.

- Mrs. - Rev.
- Ms. - Col.
- Miss - Dr.
- E-Mail addresses and phone numbers are very important for follow-up efforts
- Address types
 - The Home tab = Florida address, primary address
 - The Mailing tab = PO Boxes
 - The Other tab = Northern or alternate address
 - *Utilizing the auto change function* - If you know the dates your parishioner is at this alternate address you should mark them as “seasonal” in the Family Group, enter “To” and “From” dates as supplied by family. This function assumes primary address as “Home” address and swaps to “Other”. If “Home” address doesn’t equal “Mailing” this must be addressed to function correctly.
 - *If there are no fixed dates supplied by the parishioner*, don’t enter a “To” or “From” date and manually change it when advised by the family.
- On the Member Details tab, make sure gender, title and marital status are correct.
- Changes made by the Campaign Processing Office will be documented in the notes tab.

Family Group and Registration status –

Family Group and registration for each household should be reviewed regularly to make sure there is no conflict. For example, you should not have an unregistered active donor. Please see the Parish Soft Family Group cheat sheet below for guidance. The Family Groups and Status Interaction table can be downloaded on the APA 2021 Resource Page, and parishes can also contact the Campaign Office for assistance.

Active (Registered)	Active families are those where one or more members are also designated as active. Those families that are actively participating in Time, Talent and Treasure. Family status is registered.
Registered	A family has formally completed registration paperwork with a parish.
Contributor (Unregistered)	Family is contributing but not registered in this parish. Family status is unregistered. They are giving but have never formally registered.
Visitor (Unregistered)	Family is contributing but not known or registered in this parish. Used for out of town visitors.
Seasonal Resident (Registered or unregistered)	Active families where one or more members are also designated as active, but only in the parish a portion of the year. Family status can be registered or unregistered depending on the circumstances.
Moved out of Diocese (Unregistered)	Family has moved out of the diocese. Family status is unregistered.
Inactive (Registered or Unregistered)	A family is considered inactive when no members are designated with a status of active. This family group can be used to manage your census data and track those families that have shown no participation in Time, Talent or Treasure for more than 2 years. Think of this group as another opportunity to reach out to your parishioners. Family status can be registered or unregistered depending on the circumstance.
School Only (Unregistered)	The family has a member in the parish school but is not registered in the parish. Used for tracking only does not affect census.

Religious Ed Only (Unregistered)	The family participates only in the religious education program but is not registered in this parish. Family status is unregistered however the family may be imported to actively participate in the RE program while remaining registered at another parish. When this is the case the family status will reflect registered at the parish you have imported the family from, and the family group should be changed to reflect RE only.
Sacrament Only (Registered or Unregistered)	Family is there to receive a sacrament however is not a registered member of your parish and does not affect your census. (A bride wants to get married at her childhood home parish, or the parents who want to have their baby Baptized in the grandparent's parish.) Family status is normally unregistered but can be registered depending on Parish circumstances.
Staff (Unregistered)	Member of the staff who's only relationship with your parish is as an employee. Family status is unregistered.
Clergy/Religious (Registered)	This group is for the clergy and religious working in your parish. As all clergy and religious are actively counted in the census of the diocese using this family group will not double the census count. This also provides correct statistical information for Kennedy Directory and Status Animarium.
No Surviving Members (Unregistered)	When the last member of a family dies, the family becomes unregistered and the family group is changed to No Surviving Members.
Organization / Business (Unregistered)	When an organization such as the Knight of Columbus, Women's Group or Men's club or a business such as Publix contributes to the parish.
Unknown/Invalid Address (Registered or Unregistered)	This is used when an address is unknown, invalid or decline publication for any reason. It may or may not affect the registration status. Could be registered or unregistered depending on the circumstances.
Unknown	This family group should NEVER be used.

New Family Entry –

The correct method to enter a new family is to add the members details first and when completing the family screen use "Auto Fill". This may not always supply the desired results. An example would be if the husband and wife last name differs such as "Jim Smith and Jane Adams-Smith". In these cases, you would auto fill with "Mr. Jim Smith and Mrs. Jane Adams-Smith" when what you had in mind was "Mr. and Mrs. James Smith". In these cases, review the entry, and edit as needed without changing member details.

Family no longer at your parish –

Do not delete a family or remove last name and address information. The family may be shared with another parish, and this information will disappear from the entire system disrupting the other parish's ability to communicate with the family. This "solution" makes duplicate detection virtually impossible.

Instead, please request that the diocese remove the family from your parish list and retain all name and address components.

Deceased –

When a member is deceased with a surviving member, the deceased status should be changed to “deceased”. The surviving member status changed to “Head” and marital status to “widowed”. Auto fill should then correct the family level screen correctly.

When the last member of a family is deceased –

- 1) ensure all members have been updated to a member status of “deceased” even if you don’t have a date.
- 2) Do not remove name and address details.
- 3) In address 2 enter “Deceased: Last known address”.
- 4) Remove registration.
- 5) Set Family Group to “No surviving members”
- 6) Uncheck “Send Mail”
- 7) In the event you do not need the family in your parish list, please ask the diocese to remove the family from your view. The Family will be moved to a special organization “Virtual Archive”. In the event you need to review the family data, you may re-import the family as you would when entering a new family.