

GABRIEL SOFTWARE LLC



Diocese of
Green Bay

FOUNDATION FINANCIAL REPORTING

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




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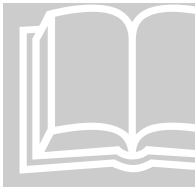
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Foundation Financial Reporting

Design of enhancements to create a Family Financial Analysis Report within the Gabriel Diocese Module. This report will be able to be run for any number or all of the parishes within the database and will produce a .csv, .xlsx or PDF file. In addition changes will be made to allow for the updating of families.systemfamilyid field which will contain the Raiser's Edge Constituent number

This document is intended to define the forms, reports, and data structures to support the identified enhancements within Gabriel.

Design Narrative



Information needed to aide Capital Campaign setup

Green Bay Information Technology (IT) met with the Diocese of Green Bay Foundation regarding their requirements to get family giving information for use in establishing Capital Campaigns for the parishes. Parishes will be organized into “Blocks” which will relate to when the parish wants to initiate a campaign. Parishes within the blocks could be within any Vicariate or city. The grouping will be based on their desired start date.

Additional notes received from IT are included in the Appendix. Information from those notes will be included in the detailed specifications to follow.

Proposed Process

Diocese Module

Gabriel has a Security Role called diocese admin. This security role allows access at the highest level of a diocesan database. Current functions include the ability to do a Family Search by status, deanery/vicariate, family language, address, city and

Consideration for 2021
Create Diocese Funds to
Standardize Data

registration date (range). The user has the ability to produce mailing labels, download the data to excel and mail/text the resulting set of the search.

Additional functionality allows for the diocese users to establish Diocese Funds for use by the parishes. This is ideal for data standardization for diocesan and national second collections. All parishes use the same fund, can only see and report on the data that they enter and the diocese gets instant visibility to what was entered into the fund across the diocese. The Foundation may want to consider using Diocese Funds for campaigns that are inter-parish. Both pledges and Contributions may be entered.

New Family Giving Analysis Report

The requested reporting function will be added at the Diocesan level. A new form that will list all parishes in the diocese will be created with selection buttons on the left hand side. The user will be able to select any number of parishes or not checking any will select all parishes. After selecting the parishes, the user will click the Reports drop down menu and select Family Giving Analysis.

A parameter screen will pop up to allow for the selecting of three years that will be used to filter contribution data for the report. A complete list of the fields that will be on the report appears in the Report Specification section of this design.

Also on the parameter screen will be the desired output type. Three options will be provided: Comma Separated Values (CSV), Excel (XLSX) or Portable Document Format (PDF).

Fund Data Standardization

To facilitate the reporting for just “normal”/“first collection” donations, the parishes will be instructed to update the fund description for the fund within Gabriel that currently holds that data. Today there are many different fund descriptions being used that contains those donations. Sunday Collections, First Collection, Weekly Offertory, Offertory, Plate donations, Parish Support.

The Diocese has decided that all parishes will indicate their first collection fund description as **Parish Support**. The report will actually filter data and only include data for funds named Parish Support.

Raiser's Edge Constituent ID

During the ParishSoft to Gabriel data conversion project, the sdiocesandid which was stored in ParishSoft and represented the family's constituent id within Raiser's Edge was brought into the sysrefstring column located on the Gabriel families table. The constituent id is a numeric data value and the sysrefstring is a character (nvarchar) data column.

In consideration of future data warehousing initiatives, we are suggesting that this data be moved to another numeric column that already exists on the families table and is currently not being used – systemfamilyid. This will align the data types and allow for better joins and linking when bringing Raiser's Edge and Gabriel data together in a data warehouse or other reporting initiatives.

Gabriel has requested a new listing from the diocese ParishSoft database which contains the diouniqueid and related sdiocesandid fields from the mastermemberindex table so that the systemfamilyid column on the families table can be populated.

The sysrefstring column on the families table will be repurposed to contain the families Generation category as defined by the Pew Research group. The value is based on the oldest member within the family and can be used to generation giving analysis.

Expose Constituent ID in Family Maintenance

Green Bay would like to provide the parish administrators the ability to update the Raiser Edge constituent id associated with a family. The proposed form change to the Administrative tab will show the current value and allow it to be changed. This function will be limited to users that have the Church Administrator Security Role only. The field will be view only for all other security roles.

Add Constituent ID to Download

On Family Search, users have the ability to download the resulting set of families to Excel or CSV. As part of this enhancement, the systemfamilyid field which contains the Raiser's Edge Constituent ID will be added to the columns to be downloaded. We will also review the outstanding enhancement requests in our Pendo Product Management system to include all previously requested columns of data from the families table that are currently not being included.

Bulk Updates

Gabriel Support Services will be happy to do periodic bulk updates of constituent ids within Gabriel. The data file provided by the diocese should contain the Gabriel Family ID and the Constituent id. The script will simply replace the current value in the systemfamilyid field on the families table. The automatic audit feature will store the previous value prior to update in the hst.families table. This table is available for review via the database query and reporting tools. There is no visibility to the audit data from the User Interface.



Form Design Family Administrative Tab

Below is a mock up of the changes indicated for the family administrative tab.

A control will be added to the bottom of the third columns of data on the tab. The first control in the column contains the Family Language (dropdown control), followed by a view only control that shows the Gabriel Family ID.

A new control will be added to show the systemfamilyid column from the families table which will contain the Raiser's Edge Constituent ID. Like all other controls on the form there will be no data label. The column name will appear when the column is empty and will also show as hover text when a user's mouse comes over the column. This is indicated below in the mock up.

The mockup shows the Gabriel Software interface for the Family Administrative Tab. The top navigation bar includes links for Site Admin, Families, Committees, Fund Raising, Religious Ed, Scheduling, Administrative, and Reports. The main form is titled "New Family" and includes fields for contact information (Brunelle, Armand & Michele, Mailing Name, Salutation, Active status, MA, 02703-1005), address (47 Commonwealth Avenue, Address Line 2, Attleboro), email (armand.brunelle@me.com), and phone ((508) 222-6148). A Notes field is also present. Below these fields are tabs for Administrative, Members, Mailing Address, Pledges, Contributions, Statistics, PRM, and Churches. The Administrative tab is active, showing fields for Census Sent Date (10/7/1988), Census Received Date (1836), and a dropdown for English. There are checkboxes for "Has Envelopes" and "Non-Member". A Constituent ID field displays 9483733. At the bottom, there are buttons for Delete, Save, and Reset. A vertical "Suggestions" button is on the right side. The footer indicates copyright 2020 by Gabriel Software, LLC, with links to Gabriel Help and English.



Form Design Parish List

A new Parish List/Selection screen will be created within the Diocese Module. This form will be used to select any number of parishes from the active parish list within the diocese database for use with the Family Giving Analysis Report. It is expected that it would be used for any Report on the Diocese Reports dropdown menu.

The designer has suggested it would function like other tables of data within the Gabriel User Interface. However, this may need to be constructed differently to allow the user to select any parish from the list not just those on the page presented.

The application engineer will need to decide if the entire list needs to be one large control with scrolling and selection capabilities.

Church IDs for the selected parishes will be passed as parameters to the Report

The screenshot shows the Gabriel Software interface with a purple header bar containing the logo and navigation links: Families, Committees, Fund Raising, and Reports. Below the header is a toolbar with Search, Reset, New Family, Email & Text, and Download. The main content area displays a table with two columns: Church Name and City. The table lists 10 parishes, each with a checkbox in the first column. The footer shows pagination controls (Previous, Next, Show: 10) and status information (Page 1 of 171, 1706 record(s) found).

Church Name	City
<input type="checkbox"/> All Saints Parish	Denmark
<input type="checkbox"/> All Saints School	Antigo
<input type="checkbox"/> Annunciation/Blessed Virgin Mary Parish	Green Bay
<input type="checkbox"/> Assumption BVM Parish	Pulaski
<input type="checkbox"/> Corpus Christi Parish	Sturgeon Bay
<input type="checkbox"/> Diocesan Office of Families and Schools	Green Bay
<input type="checkbox"/> Good Shepherd Parish	Chilton
<input type="checkbox"/> Holy Cross Parish	Bay Settlement
<input type="checkbox"/> Holy Cross Parish	Kaukauna
<input type="checkbox"/> Holy Cross Parish	Mishicot



Report Design Family Giving Analysis

This new report will be available on the Reports dropdown menu within the Diocese Module.

As part of the design, a SQL script was created that will provide data to the report. It appears below along with the output copied to an Excel Spreadsheet.

SQL Script

This SQL Script was quickly developed as a proof of concept to assess the availability of the data points requested and to assess the ability to link and summarize the contribution data as requested. When the stored procedure is developed, column names within the temp table will be variable as opposed to actual year values and the conditions will be evaluated using parameters that will be passed to the stored procedure from the Report Parameter form.

```
select fa.familyid as Familyid,
fa.sysrefint as ConstituentID,
cf.statuscode as FamilyStatusAtRegChurch, fa.firstname, fa.lastname, fa.mailname, fa.Addr1,
fa.addr2, fa.city, fa.state, fa.zipcode,
fa.registeredchurchid as RegChurchID, ch.churchname as RegChurchName, ch.city as RegChurchCity,
cf.registrationdate,
--sum( case when Year(contributiondate) = 2016 then contributionamount else 0 end) as '2016Total',
sum( case when Year(contributiondate) = 2017 and c.churchid = fa.registeredchurchid then
contributionamount else 0 end) as '2017TotalReg',
sum( case when Year(contributiondate) = 2018 and c.churchid = fa.registeredchurchid then
contributionamount else 0 end) as '2018TotalReg',
sum( case when Year(contributiondate) = 2019 and c.churchid = fa.registeredchurchid then
contributionamount else 0 end) as '2019TotalReg',
sum( case when Year(contributiondate) = 2019 and c.churchid <> fa.registeredchurchid then
contributionamount else 0 end) as '2019TotalOther',
sum( case when Year(contributiondate) = 2020 and c.churchid = fa.registeredchurchid then
contributionamount else 0 end) as '2020TotalReg',
sum( case when Year(contributiondate) = 2020 and c.churchid <> fa.registeredchurchid then
contributionamount else 0 end) as '2020TotalOther'
into tmp.REContributionData --drop table tmp.REContributionData
from familyfundcontributions c
join families fa on fa.familyid = c.FamilyID
join funds f on c.fundid = f.fundid and f.funddescription = 'Parish Support'
join churchfamilies cf on fa.familyid = cf.familyid and fa.registeredchurchid = cf.churchid
join churches ch on fa.registeredchurchid = ch.churchid
where
c.contributiondate >= '2016-01-01' -- and c.contributiondate <= '2017-12-31'
and cf.statuscode not in ('DECEASED', 'DELETED', 'INACTIVE')

group by fa.familyid,
fa.sysrefint,
cf.statuscode, fa.firstname, fa.lastname, fa.mailname, fa.Addr1, fa.addr2, fa.city, fa.state,
fa.zipcode,
fa.registeredchurchid, ch.churchname, ch.city,
cf.registrationdate
```


Sample Data

Book1 - Excel										Armand Brunelle									
File Home Insert Draw Page Layout Formulas Data Review View Help Power Pivot Team Table Design										Share Comments									
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A1										FamilyId									
Sensitivity: Not set																			
FamilyId										Personal Public General Confidential Highly Confidential									
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FamilyId																			



Data Tables

REContributionData

A Temp table will be created when the SQL Stored Procedure runs to collect all of the data points and summaries as identified within this design. The list of columns appears below.

tmp.REContributionData
Columns
Familyid (int, not null)
ConstituentID (int, null)
FamilyStatusAtRegChurch (nvarchar(10), null)
firstname (nvarchar(80), null)
lastname (nvarchar(80), null)
mailname (nvarchar(200), null)
Addr1 (nvarchar(80), null)
addr2 (nvarchar(80), null)
city (nvarchar(80), null)
state (nvarchar(80), null)
zipcode (nvarchar(20), null)
RegChurchID (int, null)
RegChurchName (nvarchar(50), null)
RegChurchCity (nvarchar(50), null)
registrationdate (datetime2(0), not null)
2017TotalReg (money, null)
2018TotalReg (money, null)
2019TotalReg (money, null)
2019TotalOther (money, null)
2020TotalReg (money, null)
2020TotalOther (money, null)



Conference Room Pilot Test Plan

To verify that the Process is working as specified, we will need to conduct the following checks on the system.

1. Run the Foundation Report for a given parish for years 2018, 2019 and 2020
2. Within the Parish, run the Fund Raising Report three times grouping by family
 - a. 2018
 - b. 2019
 - c. 2020
3. Validate for 20 families that the totals match on all three families.



Open Issues

This section outlines any open design issues that may have come up as a result of the design process. Responses to questions will be recorded here to document any revisions to the design document. Please feel free to add any questions that you may have as your review the design.

1. The Foundation wants to collect and group data as indicated in the IT meeting notes like this:
 - a. Year 1 Regular offertory for registered parish
 - b. Year 2 Regular offertory for registered parish
 - c. Year 3 Regular offertory for registered parish
 - d. Other Summary Year 3 Regular Offertory for all other parishes
 - e. In speaking with IT there seemed to additional requirements for holy day collections as well
 - f. **ISSUE** – lack of data standardization in fund names will make it virtually impossible to filter and select on just regular offertory and/or holy day collections
 - i. **Suggested Resolution** – Collect Total Giving for Registered parish for each of the three years and all other parish/entity giving for Year 3
 - g. **RESOLVED** – Parishes will update Fund Description for their first collection fund to **Parish Support**
2. An assumption was made when developing the proof of concept SQL Script that the Foundation will want to exclude families with the following statuses:
 - a. Deceased
 - b. Inactive
 - c. Deleted (this is a system status that is assigned when a parish administrator deletes a family in the user interface)
 - d. The status code was also added as a field to the SQL Proof of Concept
 - e. **RESOLVED** – Families with a Status Code of Inactive will be included in the report



Design Acceptance

Foundation financial reporting

This Design has confirmed the original estimates provided to the Diocese of Green Bay in the Statement of Work Order number 2020-03. Gabriel is currently expecting to deliver this enhancement on time and on budget assuming we are able to resolve and document resoluitions to any open issues identified herein and receive acceptance of this design before end of day March 30, 2020

Signature

Printed Name

Date



Appendix

Notes provided from Green Bay IT regarding their meetings with the Foundation

Software Requirements Gabriel Software

This document is the result of a meeting between The Catholic Foundation (CF), CCS an organization that manages the One by One Capital Campaign, and the Information Technology department at the Diocese of Green Bay. This meeting was held on March 12th in Melania 13 conference room on the Diocesan campus. The software requirements to produce the desired outcome are included in this document.

This meeting produced three goals to accomplish with these software requirements. The desired deadline for these goals is April 8th 2020.

1. Produce a csv file that contains summary financial information summarized by Parish, Registered family and Year.
2. Produce a csv file that contains registered family demographic information and family ID numbers.
3. Provide the ability to receive bulk Constituent ID numbers from the CF, to be used to populate Gabriel Software which ties the family IDs together for two separate systems.

Goal Number One and Two

Security -

The Catholic Foundation (CF) has already received written permission from the majority of the Pastors to extract the data from the Gabriel Software system. We currently have eight CF staff with some security clearance to all Parishes in Gabriel Software. If additional security roles are needed, to run this report across selected Parishes, we will need the ability to globally set those rights for the CF staff. We also authorize the creation of this new security role.

Any transmission of family financial information, outside of producing the report in Gabriel and the Diocese of Green Bay network, will be sent through secure data channels only. Secure email and secure file transfer tools are available and must be used to transmit data between all parties outside of network.

Running the Report -

1. A listing to select multiple Parishes in one report should be made available. This report should be designed to run between 1 and all Parishes at one time.
2. A listing of available years to run the report should be made available. The 3 years selected by the user should be displayed on the report. 3 years must be selected by the user. The year selection list should contain the most recent seven years descending order.
 - a. Today that list should say 2020,2019,2018,2017,2016,2015,2014
 - b. January 1st, 2021 that list should say
2021,2020,2019,2018,2017,2016,2015

Parish must have offertory recorded in Gabriel Software for the years selected.

Goal Number 3

The Constituent ID is a unique ID value generated by the Raisers Edge software system contracted by CF. A Constituent ID equals one Contributing Unit. A Contributing Unit at the Parish is one family unit with a unique integer value called the Family ID. One Constituent ID equals one Family ID.

Requirements – csv Report file

1. It is believed that the first two goals above can be accomplished with one report.
2. The report will be restricted to “Registered” families at each parish.
3. The funds on the report will be restricted to weekend and Holy Day offertory.
4. The report should summarize offertory by family by calendar year.
5. The report will summarize offertory in a fourth column. The fourth summary column will contain a summary of all offertory the family made to all other parishes in the most recent year selected.
6. The report will have one data row per family ID.

Fields Required

Page Header will have the Registered Church ID, Registered Parish Name and Parish City. A new page must be started when the Registered Church ID changes.

1. Family ID
2. Constituent ID (Gabriel SysRefString converted from ParishSOFT).
3. Family StatusCode
4. Family First Name
5. Family Last Name
6. Family Address line 1
7. Family Address line 2

8. Family City
9. Family State
10. Family Zip Code
11. Summary Year 1 (oldest year) Offertory
12. Summary Year 2 Offertory
13. Summary Year 3 (most recent year) Offertory
14. Other Summary Year 3 Offertory (Summary of offertory to all other parishes in Year 3)

Requirements – Receive Bulk Constituent ID for population into Gabriel

Two fields are required to populate Gabriel Software with an updated Constituent ID, Family ID and SysRefString . SysRefString currently represents the Constituent ID number that came over from ParishSOFT during the migration to Gabriel Software.

SysRefString is not visible through any screens or reports currently available in Gabriel Software. It is a field that exists in the families table and was used to hold the sDiocesanID field that came from ParishSOFT Family table.

In addition to exposing the SysRefString field in the above csv report, it should be made available in the Administrative tab for the family in the Gabriel application. This field should be writable by parish and CF staff. The label for this field should say Constituent ID. Training will be provided to the Parish as to what this new field means.

Bulk Updates

An Excel or csv file should be provided to Gabriel software with the current Gabriel Family ID number with the updated Constituent ID in the same row. Gabriel will execute an update SQL statement to install the new Constituent ID for the Family into Gabriel.

Two fields are required on the Excel or csv file per row.

1. Gabriel Family ID
2. New Constituent ID

These fields are optional in the file per row.

1. Family First Name
2. Family Last Name
3. Family Address line 1
4. Family Address line 2
5. Family City
6. Family State
7. Family Zip Code