

Adding a Member to a Standard Committee



This article is also available via a 1 min video which provides more details on the process. Video: [Adding a Member to a Committee](#). *Although the video demonstrates the Church Committees, the same process applies to Standard Committees.*

Standard Committees are those committees all parishes should have: Pastoral Council, Finance Council, Parish Staff, Executive Committee, Parish Mission Planning. If associated with a school; the committees would also include School Board and School Staff.

Standard Committees include these members:

Pastoral Council: Chair, Trustee Secretary, Pastor/Pastoral Leader, Recording Secretary, Members, Resource

Finance Council: Chair, Trustee Treasurer, Pastor/Pastoral Leader, Recording Secretary, Members, Resource

Executive Committee: Pastor/Pastoral Leader, 2 Trustees, 2 Council Chairs

Parish Staff: (See the positions list in the committee)

Parish Planning Committee: Pastor/Pastoral Leader, Facilitator, Communications, Technical, Members

If your parish is associated with a school:

School Board: President, Vice President, Secretary, Treasurer, Members

School Staff: (See the positions list in the committee)

Once your Standard Committees are set up, if you have Church Committees by the same name they should be removed.

You can add members to committees via **Member Maintenance** or **Committee Maintenance**.

***Tip:** *If you are adding a significant number of Committee members, the quickest way to add them is via **Committee Maintenance**. You avoid having to search for each individual member.*

****Tip:** *To avoid confusion between Church Committees and Standard Committees with the same Committee Name, you will want to update the Church Committee Name (like Finance Council to Finance Council2) so you can distinguish them from Church vs. Standard Committees – especially when assigning committees using Member Maintenance.*

Adding a Member to a Standard Committee via Committee Maintenance

1. From the menu, Click **Committees > Committee Maintenance** and Select the Committee by clicking on the Committee Name where you wish to add or edit members.

<input type="checkbox"/>	Committee Name	Members	Schedule	Priority
<input type="checkbox"/>	Executive Committee	5	No	0
<input type="checkbox"/>	Finance Council	9		0
<input type="checkbox"/>	Parish Mission Planning	0		0
<input type="checkbox"/>	Parish Staff	2		0
<input type="checkbox"/>	Pastoral Council	9		0
<input type="checkbox"/>	School Board	0	No	0
<input type="checkbox"/>	School Staff	0	No	0

The number of members in your parish committee. If you are part of a group of linked parishes, this number will reflect all the members of the linked parishes.

2. In Full Name, type the last name of the member (like Younger, Pat) and select the member from the list.

This screenshot shows the 'Members' tab of the software interface. Annotations include:

- A box pointing to the 'Full Name' field: "Type in the last name of the Member you wish to add to the committee, and select from the pop up list."
- A box pointing to the 'Position' dropdown: "Choose the committee position from the drop down list."
- A box pointing to the 'Start Date' and 'End Date' fields: "If Council Chair, Trustee or Parish staff person with contract dates, enter start date/end date."
- A box pointing to the 'Save' button: "Save when done"
- A purple box containing text: "Preferred Service, Family Service (No/Yes), Month-Week, Max Per Month applies to Ministry Scheduling for Masses, not committees."
- A red box containing text: "For Council Chairs and Trustees: Trustees may service 3 two-year terms consecutively. If re-elected or re-appointed, the end date would be updated for 2 more years, the start date remains the same. Council chairs may serve three-year terms, renewable once. If renewed, the end date is updated, the start date remains the same."

Full Name	Committee Position	Start Date	End Date	Cell Phone	Email	Actions
Martha	Member	6/1/2018	6/30/2021	715-...	m...@...net	View Delete
John	Trustee Secretary	10/1/2019	10/30/2021		...@...net	View Delete
Joseph	Chair					

3. **Committee Position** is used to define the position within the committee, for example, Chairperson, Secretary, Treasurer, Member, etc.. For Standard Committees, the position (attribute) options have been set for you. Click the arrow next to Positions to get the drop down list.

This screenshot shows the 'Members' tab with the 'Position' dropdown menu open. Annotations include:

- A red box pointing to the dropdown arrow: "Click the arrow next to positions to select from the list of positions."
- A red box containing text: "Each committee in the Standard tab will have a specific set of positions to choose from."

Full Name	Committee Position	Start Date	End Date	Cell Phone	Email	Actions
De...	Resource					View Delete
Dv...	Member					View Delete
Er...	Member					View Delete
Fr...	Member					View Delete
Kr...	Vice-Chair	6/1/2019	6/30/2022	715-...-2	jkr...@...net	View Delete
Le...	Trustee Treasurer			920-...-3	let...@...com	View Delete
Mc...	Chair	7/1/2018	7/1/2020	920-...-9	jo...@...com	View Delete

4. **Start Date** and **End Date** is used to indicate a member's term on a committee. **These fields are particular important for Trustees, Pastoral Council and Finance Council Chairpersons.**
5. **Click Save, and then repeat the process until each member is added.**

5. *Preferred Service, Family Schedule, Month Week, Max Per Month are fields that are used for Ministry Scheduling. Please refer to this Solution article for Ministry Scheduling. ([Ministry Scheduling - Committee Assignments](#))*

Adding a Member to a Standard Committee via Member Maintenance

1. Scroll to **Families > Member Search** ([Using Family and Member Search](#))
2. On the **Member Maintenance** form, click on the **Committees** tab

The screenshot shows the 'Member Maintenance' form with the 'Committees' tab highlighted in red. The form includes fields for member information (Name, Email, Cell Phone, Salutation, Active status) and a list of committees. The 'Committee Name' field is set to '(Unknown)' and the 'Committee Position' field is empty. A red box highlights the 'New Committee' button at the bottom left of the committee list.

6. Click on **New Committee**. You will see the list of ALL committees – both Church Committees and Standard Committees. *To help in choosing the Standard Committee, it's a good idea to change the committee name in the Church Committee list to distinguish them from each other. Example below has Pastoral Council (the Standard Committee) and Pastoral Council1 (the Church Committee).*
7. Select the **Committee** that you wish to add the member to from the drop-down box.

The screenshot shows the 'Add Committee Member' dialog box. The 'Committee' dropdown menu is open, displaying a list of committees. 'Pastoral Council' is highlighted with a red box. Other committees in the list include Executive Committee, Executive Committee1, Finance Council, Funeral Servers, Parish Mission Planning, Parish Staff, Pastoral Council1, School Board, School Staff, and test this committee. The 'Committee Position' dropdown is set to 'Position'. The 'Preferred Service' dropdown is set to '(Preferred Service)'. The 'Max Per Month' dropdown is set to '(Max Per 1)' and the 'Year' field is empty. 'Save' and 'Cancel' buttons are at the bottom right.

The screenshot shows the 'Add Committee Member' dialog box with various fields and annotations. The 'Committee' dropdown is set to 'Finance Council'. The 'Committee Position' dropdown is set to 'Position'. The 'Start Date' and 'End Date' fields are empty. The 'Preferred Service' dropdown is set to '(Preferred Service)'. The 'Family Schedule' dropdown is set to 'No'. The 'Month Week' dropdown is set to '(Month 1)'. The 'Max Per Month' dropdown is set to '(Max Per 1)' and the 'Year' field is empty. The 'Save' and 'Cancel' buttons are at the bottom right. Annotations include:

- Choose the committee from the drop down list (pointing to the Committee dropdown)
- Choose the committee position from the drop down list (pointing to the Committee Position dropdown)
- If Council Chair, Trustee or Parish staff person with contract dates, enter start date/end date. (pointing to the Start Date and End Date fields)
- Preferred service pertains to Ministry scheduling for Masses (pointing to the Preferred Service dropdown)
- Enter year the member first joined this committee. (pointing to the Year field)
- Save when done (pointing to the Save button)
- Family Schedule, Month Week, Max Per Month applies to Ministry Scheduling for Masses, not committees. (pointing to the Family Schedule, Month Week, and Max Per Month dropdowns)
- For Council Chairs and Trustees: Trustees may service 3 two-year terms consecutively. If re-elected or re-appointed, the end date would be updated for 2 more years, the start date remains the same. Council chairs may serve three-year terms, renewable once. If renewed, the end date is updated, the start date remains the same. (pointing to the Start Date and End Date fields)

8. **Committee Position** is used to define the position within the committee, for example, Chairperson, Trustee Secretary, Treasurer, Member, etc. For Standard Committees, the position options have been set for you.

Full Name

(Preferred Service)

Position

Start Date

End Date

(Max Per Month)

Save

Click the arrow next to positions to select from the list of positions. Each committee in the Standard tab will have a specific set of positions to choose from.

Full Name	Committee Position	Start Date	End Date	Cell Phone	Email	View Delete
Yuengling, Delliha	Resource				deedee@demo.com	View Delete
Millering, Elizabeth	Member			920-555-9876	Millerings@demo.net	View Delete
Fixteig, Rebecca A	Member			715-555-4141	FixerUpper@demo.com	View Delete
Everson, Laura	Trustee Secretary	5/19/2019	5/18/2021		levers@mydemo.com	View Delete
Ichette, Jed K	Pastoral Leader	4/9/2018		920-554-1212	ichette@demo.com	View Delete
Lauscher, John	Chair	6/3/2018	6/2/2021			View Delete

9. **Start Date** and **End Date** is used to indicate a member's term on a committee. **These fields are particular important for Trustees, Pastoral Council and Finance Council Chairpersons.**
10. *Preferred Service, Family Schedule, Month Week, Max Per Month are fields that are used for Ministry Scheduling.*
11. Press the **Save** button and the member is now on the Committee
12. A sample of a Pastoral Council Committee is below

Full Name

Position

Start Date

End Date

(Preferred Service)

(Month Week)

(Max Per Month)

Save

Full Name	Committee Position	Start Date	End Date	Cell Phone	Email	View Delete
Yuengling, Delliha	Resource				deedee@demo.com	View Delete
Millering, Elizabeth	Member			920-555-9876	Millerings@demo.net	View Delete
Fixteig, Rebecca A	Member			715-555-4141	FixerUpper@demo.com	View Delete
Everson, Laura	Trustee Secretary	5/19/2019	5/18/2021		levers@mydemo.com	View Delete
Ichette, Jed K	Pastoral Leader	4/9/2018		920-554-1212	ichette@demo.com	View Delete
Lauscher, John	Chair	6/3/2018	6/2/2021			View Delete

Once you've created your Standard Committee lists, you should delete the Church Committee with the same name from the Church Committee list – there should only be one Committee for Pastoral/Finance Councils, Parish Staff, etc. in the Standard Committee tab.