

Diocesan Staff Roles and Responsibilities for MinistryPlatform Onboarding



PROJECT SPONSOR

The Project Sponsor champions the MinistryPlatform implementation from a business perspective and helps to remove obstacles that might harm its overall success if needed. This person should be Executive Level or above.

- Communicates why the diocese is migrating to MP to pastors & parishes (business need)
- Ensures necessary resources are identified and available to ensure project success (i.e., appoints Diocesan Rep(s)).



DIOCESE REP(S)

The Diocesan Rep plays a critical role in the success of the overall project. It is important that both MinistryPlatform and the diocese invest in this person(s) to ensure success and adoption at both the parish and diocesan levels. The role of the Diocesan Rep is two-fold, managing the implementation of each wave and supporting live parishes. Multiple Diocese Reps may be needed to fulfill these roles:

- Main communications contact - connection between parishes and MinistryPlatform Team.
- Works with the MinistryPlatform Project Manager to set the overall wave schedule and select parishes for individual waves.
- Attends training sessions with the Implementation Specialist to ensure the rep has the knowledge needed to support the parishes.
- Sets up Global Filters and configures customized security roles and permissions for each wave.
- Works with the Implementation Specialist and Project Manager to manage individual waves by communicating with parishes about the data migration schedule and upcoming training sessions.
- Provides ongoing updates to parish rep.
- Ensures that parishes are engaged and staying on track.
- Accountable for parishes completing legacy data clean-up, data checks, and attending training courses and coaching sessions.
- Communicate any roadblocks that parishes are encountering.
- Reports data migration issues identified by parishes (via Monday.com Form) and reports back to parishes.
- Works with the MP Team to ensure parishes are ready to transition to the production database on the scheduled go-live date.
- Parish Visits - works with parishes one-on-one to implement MP functionality.
- Partners with MP to gather and inform parishes of resources (upcoming webinars, bootcamps, Support), issues, needs, and product updates.
- Works with the diocese, parishes, and vendors to implement integrations.



PARISH REP(s)

The Parish Reps will become the MP SME (Subject Matter Expert(s)) for their parish, ultimately supporting other staff and parishioners at their parish.

- Attends data clean-up training (if legacy PDS) with Migration Data Expert and performs any necessary data clean-up prior to migration.
- Completes data migration testing using a provided checklist.
- Completes training courses and attends coaching sessions during wave onboarding.
- Reports any data migration issues found to the diocese rep and confirms issue resolution.
- Is involved in the rollout of MP functionality to both staff and parishioners at their parish.