

SOP: Memorial Notification

Purpose

To ensure timely, compassionate communication to members who wish to receive memorial service notifications.

This process also standardizes how notifications are managed by:

- Using a single, consistent memorial notification form for all services
 - Eliminating the need to update or create a new link for each individual memorial
 - Automating updates and outreach to ensure no one is missed
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1. Update Memorial Notification Custom Field in PCO People

Update Custom Field

- Go to **PCO People** → **Custom Fields Options** → **Communication Preferences tab**
- Locate the "**Memorial Notification**" custom field
- Add a new checkbox with the **name of the deceased**
 - Example: `Jane Doe – Memorial Notification`

Create List

- Go to **Lists** in PCO People
 - Create a new list titled: `Memorial Notification – [Name of Deceased]`
 - Set Conditions:
 - `Communication Preferences → Memorial Notification → includes: [Name of Deceased]`
 - Set the list to **refresh daily**
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2. Notification Email Automation

Manual Send When Memorial Date Is Public

When a memorial date is public and cleared for communication:

- Draft an email including:
 - Service date, time, and location (in-person and/or Zoom)
 - Obituary or additional details (if available)
 - The **standardized memorial notification form link**
- Send to the **corresponding notification list** created in Step 1

Automation for Future Sign-Ups

- Set up automation to send a confirmation email to anyone added to the list after the initial email goes out

Trigger:

- When a person is added to the list

Action:

- Send them a template memorial notification

Add Email Template to PCO

To create an email template:

- Go to: <https://people.planningcenteronline.com/people>
- Click the **gear icon (⚙)** in the upper right corner
- Select **“Manage Email Templates”**
- Click **“+ New Email Template”**

Template"

Dear [First Name],

We invite you to join us in remembering and celebrating the life of **[Full Name of Deceased]**.

Memorial Service Details:

Date: [Insert Date]

Time: [Insert Time]

Location: [Insert In-person Address or indicate if online only]

Join via Zoom:

[Insert Zoom Link]

Meeting ID: [Insert ID]

Passcode: [Insert Passcode]

You are welcome to join us in person or online. We honor your presence in whatever way is most accessible and meaningful to you.

[If recording] A recording will be posted a few days after the service at <https://foothillsuu.org/caring-ministry/memorials/>

Thank you for being part of this circle of memory and care.

With tenderness,

The Foothills Unitarian Ministry Team

4. Remove Name from Memorial Notification Custom Field After the Memorial

Once the memorial service has concluded and all communications have been sent:

- Go to **PCO People** → **Custom Fields Options** → **Communication Preferences tab**
- Locate the "**Memorial Notification**" custom field
- **Remove the checkbox with the deceased's name** to prevent future unintended notifications
- Confirm that any associated **Lists** (e.g., "Memorial Notification - [Name of Deceased]") are no longer needed
 - If so, **archive or delete** the list to reduce clutter and confusion

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