



Bishop David Kagan
Diocese of Bismarck



Laura Huber
Finance Officer
Diocese of Bismarck

Diocese of Bismarck Implements ConnectNow Church Accounting

Ann Arbor, Mich.—September 6, 2013—Parishes and parish-operated schools in the Catholic Diocese of Bismarck began their new fiscal year on July 1, 2013, as they never have before, with every organization tracking its financials using one standard chart of accounts in the ConnectNow Church Accounting system by ParishSOFT.

The shift to a common software technology is a change that the Diocese of Bismarck's Finance Office, led by Laura Huber, had wanted to make for some time as part of a greater initiative to streamline financial reporting, improve controls and transparency, and support parishes and schools in every corner of the diocese in their efforts to be good stewards of the money entrusted to them.

Like many dioceses, Bismarck's challenges included having all 98 parishes and schools on myriad systems—including CMS, PowerChurch, QuickBooks®, Quicken, and pencil/paper—that didn't *talk* to each other. Not only did this make consolidated reporting arduous for the Finance Office, it was impossible for bookkeepers and business managers to follow consistent accounting practices or maintain a standard chart of accounts from the various platforms. Some had no payroll systems or fixed asset tracking. Every church, even those within parish clusters, did things in their own unique way. So if they wanted training or had questions about accounting software or practices, they were on their own.

Were the financials accurate? Could parishioners rest assured that money intended for specific purposes was being used that way? In the Finance Office, as well as in many parishes and schools, where staff and volunteers did their best with the resources they had, it was hard to say yes with certainty. And it placed the bishop and pastors responsible for the money in a potentially precarious position.

When The Most Reverend David Kagan became the seventh bishop of Bismarck in November 2011, he recognized the need for common financials and became an advocate for change. The Finance Office continued to research accounting system options, hired Tony Chap to serve as parish resource manager, and, with Bishop Kagan's support, made the decision in late 2012 to make ConnectNow Church Accounting the standard system for the diocese. Their plan: bring all parishes and those parishes-operated schools live on the new system on July 1, 2013. It was a timeline not for the faint of heart.

Chap, who coordinated training, conversion, and implementation, got the project off to a great start by asking every parish to send a representative to one of four regional orientation meetings in March 2013. At these sessions, pastors or their representatives from all 98 parishes learned about the overall plan, the reasons behind the changes, and the basics of what their new ConnectNow software would do. And the Finance Office gave them an innovative option: parishes could have the diocese do the transition and ongoing bookkeeping work at cost.

Every pastor in the diocese chose a path for his parish and provided Chap with either the name of the project leader who would handle the



Tony Chap
Parish Resource Manager
Diocese of Bismarck

chart of accounts and payroll or the name of the person at the parish who would be supplying the bills and deposits to the diocese.

Finance officer Huber established the diocese's chart of accounts and furnished a roadmap for parishes, and in April and May 2013, parish project leaders handling on their own transitions began the work of mapping their charts into the common diocesan chart—a task most people who handle day-to-day bookkeeping responsibilities have never done before. Chap put together a fully-mapped example chart for parishes to use as a reference and, with the help of intern Leven Zuelke, offered everyone one-on-one help. "We knew there would be a lot of questions," said Chap, "so we went out regionally again and set up mapping session times to meet with parishes and answer their questions."

Parish staff gathered for hands-on training sessions in June, where they learned how to work within their new ConnectNow system and keep their processes aligned with diocesan policies and civil law. And as they came together in person and in practice, Chap reports, "They started talking to each other, asking questions, and looking to the staff members who had the strongest skill sets."

It's a simple collaboration that may at first have felt different—maybe even a little unnatural—to these North Dakotans, who take great pride in their independence and self-reliance. But staff have embraced the benefits of working together, becoming more efficient, and, in some cases, letting go.

Cheryl Hansen, who serves as finance and business administrator for [Spirit of Life Parish](#) in Mandan, is one of many staff whose telephone rings with questions from across the diocese that range from *how do I book this?* to *why isn't my payroll debit showing up yet (because it's scheduled for tomorrow)*.



Cheryl Hansen
Finance & Business Admin.
Spirit of Life Parish
Mandan, ND

With a background in corporate accounting, she is accustomed to working in a system in which checks and balances, full transparency, and audit-readiness are the norm. So she understands well why the Diocese of Bismarck made the change to ConnectNow. "God bless the bishop for his wisdom in not only wanting transparency but a centralized accounting system," said Hansen. "Now, if the federal government were to look at any of our parishes, they would find a transparent and centralized system that is very well run and in good working order."

Hansen is now putting her accounting background to work for her entire parish cluster. St. Martin in Huff and St. Anthony in the community of St. Anthony have access to all their financials and reports any time they need them, but Hansen handles the actual bookkeeping and reporting using separate databases in the ConnectNow system. "Each parish has strong ownership of their financials," explains Hansen. "With ConnectNow, I can provide them with reports that give them every detail about their income and expenses. They can log in and see their funds, bills, and checks. And if they have questions or need help, we're all in the same system, so I can show them where to find what they need."

Hansen believes that ConnectNow Accounting is providing parishes in the Diocese of Bismarck with more in-depth information than they've ever had before. "Every parish has goals for and a healthy future," said Hansen. "Whether their focus is on ministries, expansion, or cemetery

preservation, they'll now be able to plan and make decisions with a complete and accurate understanding of their financial picture."

In Bismarck's Finance Office, the tools are now in place to run consolidated financial reporting through ConnectNow. When a parish wants to do a renovation project, the diocese will be able to get quick answers about their assets and operational stability. When a parish's financials show that something is off, the diocese can offer proactive help, but Chap points out, "We're not going to be big brother. Our fingerprints will not be on any parish unless they want us to be. They're going to handle and fix things themselves."

Chap adds that working through the ConnectNow implementation project opened the discussion on a lot of best practices, including pastors' responsibilities, finance council awareness, checking account practices, where the altar society money should be, and using dedicated accounts for restricted funds. "We're covering a lot of new ground," said Chap. "But already, parishes have given their finance councils and altar societies limited access to get into the system and see reports. Some have discovered funds they didn't know they had. At the end of the day, our parishes are going to be more financially intelligent and much better off than they were before."

About the Diocese of Bismarck

The Diocese of Bismarck was established in 1909 and presently serves 61,650 Catholics in 23 counties spanning a 34,268 square mile area from central North Dakota to the western border with Montana. Its average parish size is approximately 65 households. Pope Benedict XVI appointed David Dennis Kagan the seventh Bishop of Bismarck on November 30, 2011.

For more information about the Diocese of Bismarck, please visit www.bismarckdiocese.com.

About ParishSOFT

Founded in 1998, ParishSOFT offers a complete suite of church and diocesan management software to connect people and the church and to reduce administrative work. The company's Web-based [ConnectNow Church Accounting](#) system, launched in 2008, is the next generation of the CMS Fund Accounting software, first introduced in the mid 1980s by ParishSOFT's sister company Church Management Solutions. The ConnectNow Church Accounting suite includes the modules Ledger and Payables, Payroll, and Accounts Receivable, as well as the Financial Consolidation Manager for dioceses.

From its earliest beginnings, ConnectNow Accounting products have been designed to meet the unique accounting and stewardship needs of churches and schools, while offering the same ease of use and affordability found in secular programs, like QuickBooks®.

ParishSOFT continually invests in improving its software and web solutions, as well as adding new features and products. ParishSOFT presently serves more than 8,500 parishes, and the company's products have been implemented in 82 arch/diocesan offices.

Please visit www.parishsoft.com for more information about ParishSOFT's products and services and its annual [users' conference](#) for parish and diocesan staff.

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