Detroit Drives to Success with New Technology

At the Archdiocese of Detroit, the situation was critical: the AS400 system that dutifully housed their Catholic Services Appeal (CSA) donor records for more than 25 years was essentially on life support.

The 2010 CSA campaign, already underway, would fuel the annual budgets of the archdiocese and countless parishes with funding for youth religious education, marriage preparation, services for the elderly and needy, operations, and much more.

With their AS400 system on life support and their Catholic Services Appeal in full swing, "We had to move quickly and make a decision."

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*Archdiocese of Detroit
Photograph Douglas Susalla*

18-member task force that researched new information management technology for the archdiocese. "We wanted a system that we didn't have to customize, and as we did our due diligence, we talked with parishes and other dioceses who really liked their ParishSOFT products. One common thread in these discussions was a big plus to me: they said 'ParishSOFT fixes things.'" Prior experience working in software services and implementations told Ashe that responsiveness indicated good performance and service—ingredients necessary for success.

Restructuring manager Rick Austin and his project team got down to business, working to implement their new DDM system in just six weeks.

Once the Archdiocese of Detroit accepted the task force's recommendation to select ParishSOFT, restructuring manager Rick Austin and his project team got down to business immediately and set a non-negotiable deadline to launch their new Diocesan Development Manager (DDM) system in just six weeks. It was a lofty goal under the best of circumstances, yet with new and/or retrained staff, and new development software, the archdiocese transitioned into all new processes in the middle of a campaign.

The Archdiocese of Detroit successfully accomplished the most aggressively scheduled DDM implementation to date.

By April 27, 2010, staff had been trained, the new lockbox was set up, and pledges were flowing into the DDM system. It was the most aggressively scheduled implementation of the DDM program in the product's six-year history—and one of the most successful.
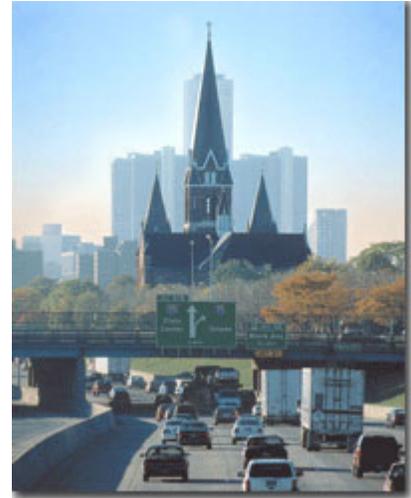
Culture of change and renewal

In a typical diocese, implementing new technology could easily take six months or more, but the Archdiocese of Detroit had all the ingredients for success. New software technology came on the heels of a major restructuring in fall 2009 to right-size Central Services and position the archdiocese for a healthy financial future. Nearly every department saw personnel changes. It was a time for change but also for renewal.

"Once all of that change was set in motion," said Ashe, "we had to look at ways to be more efficient, more effective, and supply better data." In her own department, she began the 2010 CSA campaign with all new staff—none of whom had been involved in the old AS400 processes. Ashe reports that not only were staff willing to accept the new system and support the project goals, collective thinking about new processes brought forth new ideas for working smarter. "It's pretty invigorating to tap into all that energy," said Ashe.

Leadership from all around

Upper management showed their full support for the project by allocating the right resources and letting the team keep the project on target. Austin established the "48 hours" rule, and the team stuck to their commitment to resolve any issues within that timeframe.

To help meet that standard and keep the project moving forward, ParishSOFT diocesan services representative and project team member John Biskner led the team's daily "stand-up" meetings—a standard time dedicated for all project stakeholders to get progress updates and identify any problems. Because the information technology, development, finance, and services people were all in the same room, most answers to any issues came immediately. Others always came within 48 hours.

"We had knowledgeable people fully invested in the project to paint the picture of where we were going and get us there," said Ashe, who credits ParishSOFT with being part of that group. "The services that John provided were so valuable. He helped us think through setting up the data the right way, and his expertise was essential to designing processes that were most efficient for the DDM system, so that in the end, we would get the data out in the format we needed."

Biskner, who was given a temporary desk in the Chancery office, led the onsite DDM system training for staff, a vital component to the project's success, according to Terry Kach, Associate Director of the Annual Appeal. Kach had been through another project implementation with a vendor that would do only remote training, and when they did come onsite, they were handling support calls for other customers. "Onsite training is critical," said Kach. "In a project of this magnitude, face-to-face contact means you feel what staff are feeling. When they look at you and see that you understand their needs, it builds trusting, productive relationships. John brought that to this project."

New process builds on strengths of the past

Today's process for handling the 2010 CSA looks quite different from 2009. The archdiocese has, for the most part, stopped touching CSA cash. Payments go directly through their bank lockbox and into a separate bank account, so instead of counting payments and entering data manually, Ashe receives batched data files from her bank that she imports directly into the DDM program.

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Terry Kach likes the new direction for managing CSA and having centralized data for the archdiocese and all of its parishes. Kach embraced the very first campaign in 1982, when Cardinal Edmund Szoka, then Archbishop of Detroit, launched the first annual appeal as a way to achieve the well-structured budget he needed to develop more ministries in the archdiocese and provide greater outreach to the parishes.

"We never thought it was going to be as successful as it was," said Kach. "Suddenly, we had mailbags of pledges everywhere and just one accounting person to handle it all. We knew then we needed to have an accounting department in place."

Data delivers new possibilities for campaign success

"There wasn't really a good way to look at our data [using the old system]. . . . Now, we can track our campaign's actual parish pledges to our budget and know exactly where we stand in reaching our goal. I can actually get the data when I want it."

In those first few years of the annual appeal, the archdiocese worked with a local Catholic hospital to process and maintain its campaign-related data. Purchasing their own AS400 system was a big step, and while the system served them well during its prime, Kach is the first to recognize its limitations. "There wasn't really a good way to look at our data. Any reports had to come from our data manager, and we could never actually produce any reports until maybe the tenth week of the campaign because we were so busy processing pledges."

Kach would receive a daily log and re-enter all the figures into a separate software package that would tell her which parishes were over their target goal for CSA. Today she can pull the Parish Reimbursement Report from the DDM program and see who's exceeded their goal and by how much. "Now, we can track our campaign's actual parish pledges to our budget and know exactly where we stand in reaching our goal. I can actually get the data when I want it." She can also pull a list of non-givers directly from the software— a process that prior to DDM involved manually pulling pledge cards.

Ashe also likes that the archdiocese is no longer limited by a system that essentially held their campaign data hostage. "Development and accounting staff located in different buildings can have ParishSOFT on their computers and get the CSA data they need," said Ashe. "That wasn't possible with the AS400 system."

Today, new possibilities for donor analysis, reporting, and communications are on the horizon. "From the reports DDM is giving us, we can already see a lot more information than we could ever get out of the AS400, and we can consolidate data into a single report," said Kach.

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Once they bring their historical pledge data into DDM for 2008 and 2009, the archdiocese will have the ability to provide pastors with accurate, real-time data that they can use to increase the success of future CSA drives. "I know we have pastors who will want to track donor details like who gave last year, what amount, who paid their pledges, who didn't give. DDM will let us give pastors better information that they can use to meet their parish CSA goals."

Better funding and ministry with less administration

Meeting the CSA goal, $17.8 million for 2010, is vital to each parish in the Archdiocese of Detroit. Amounts paid over the CSA goal are "paid back" via direct deposit to the parish's bank account and are not subject to the assessment the diocese applies to other fundraising. Shortfalls are considered amounts due from parish to archdiocese, so any improvements to make the annual appeal more successful at the parish level will ultimately benefit every organization and ministry within the archdiocese.

One of the biggest improvements will be eliminating the annual paper update of family names and addresses, which each parish must manually complete and return to the archdiocese before new pledge materials can be printed. "We send out volumes of green bar reports to our parishes," said Kach. "Once our parishes start synchronizing, we'll always have their most current records. They won't need to go through that annual update. We're going to save a lot of trees."

Ashe sees other benefits for parishes. Having the lockbox means parishes will no longer have to process individual pledge returns, tally up the pledges, deposit the checks into their account, and submit a check to the archdiocese using a special transmittal. "Our goal is to eliminate as much administration for the parishes as possible," she said.

Regional parish groups are now receiving ParishSOFT product training and information about archdiocesan standards as part of the scheduled July 2010–July 2011 parish "rollout." With standardized, synchronized data, the archdiocese is poised to reduce the use of paper, simplify its administration, and provide accurate, real-time information for parishes and for itself.

Kach already is looking beyond the hard data she needs for CSA and seeing a better way to serve the archdiocese's parishes and its 1.4 million Catholics. "ParishSOFT is going to help our parishes with their reporting," said Kach, "and it will give us new insight into all the other needs of the archdiocese, like parish life, education, and children's ministries. That's what it's all about."

For more information or a product demonstration, please visit www.parishsoft.com.

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