

DDM Case Study: Diocese of Toledo

Diocese of Toledo Saves Money, Increases Pledges with Best Practices and ParishSOFT

Change can be difficult, especially when it has been mandated by “the powers that be” for the workers in the field to accomplish. But as JoEllen Chochard can attest, the installation of ParishSOFT’s suite of church management software in the Diocese of Toledo resulted in such an amazing amount of time and money saved that change has been a Godsend.

Non-centralized database makes getting information tough

When JoEllen joined the Diocese in 2006 as an executive assistant in the Office of Development, she found herself dealing with a system of data management that was clumsy and inefficient. Most importantly, there was no unified, diocesan-wide database with common, centralized records. Diocesan organizations and parishes maintained their own “lists.” Compiling financial and family records reports was an overwhelming—and often incomplete or inaccurate—task.

The high price of manual data entry processes

All of this impacted the Development Office directly. For example, data entry for the 16,482 fundraising pledges was done manually. This required hiring two temps in addition to two permanent staff members, who worked daily to reduce the constant backlog.

“There was no Lockbox,” JoEllen said, referring to the process of sending checks directly to a bank whose own staff would enter the data and deposits directly into the diocese’s account.

In addition, the Diocese’s Raiser’s Edge records were inconsistent due to lack of continuity in data management processes. In December 2007 there were still 13,000 records in need of cleanup.

With the arrival of ParishSOFT, JoEllen became the in-house ParishSOFT Database Manager with responsibility for the Annual Catholic Appeal, the One Faith...Many Blessings capital campaign, and special memorial gifts to Diocesan funds.

More pledges, less backlog

One year after ParishSOFT was installed, pledges increased to 18,235, but JoEllen was able to eliminate one data entry temp because only 30% of the work was done manually. Thanks to the use of Lockbox,



backlogs were reduced to 10 business days—a substantial improvement, but nowhere near the diocese’s goal of minimal exceptions to the more efficient Lockbox process.

Lockbox equals leaps in efficiency and diocesan income

By 2008 only one permanent staff member was handling data entry in spite of an increase in pledges to over 21,000. This was possible because Lockbox was processing 98% of data entry, leaving just 2% to be handled manually for exceptions. Backlogs? There are none. The result is 4,000 to 6,000 hours per year of labor savings and two to four days each year of interest on savings—more than \$1,200 added to the bank account.

“Without Lockbox,” JoEllen said, “I would never get to go home. Now I am able to stay on top of things and have all numbers current by the end of the day.”

New process keeps data accurate, provides transparency

As JoEllen sees it, she and her staff have been transformed from overwhelmed data entry workers to people who are now *managing* the process proactively. And the process itself has been improved to the point where these managers can rely on the accuracy of the data in their reports.

JoEllen explains: “Every day now we send pledges and contributions to the Lockbox, and the bank emails us .csv files that are imported into the ParishSOFT system. Two transaction reports are then printed, one for Development and one for Finance with deposit ticket attached. Our office researches and corrects any errors or other issues, and Finance does the same. This gives us a system of checks and balances that provides transparency—a clear audit trail—and ensures that others have access to what goes in and out.”

During the active phase of a given fundraising campaign, daily Development reports allow JoEllen’s office to review performance by parish—comparing the Goal to actual pledges and tracking the number of donors, for example. The Diocesan Development office then emails a pdf report to each parish on a weekly basis.

The parishes—not the diocese—manage family census records

“Now that the Diocese’s family data are owned and managed by the parishes,” JoEllen said, “we have been able to get out of the family census data entry business. Any changes that come through during the pledge campaign are forwarded to the parish for updates. Since the parishes maintain it all, there’s very little cleanup to do at the diocesan level.”

Custom reports fast, easy and accurate

Another source of efficiency in producing reports for JoEllen is ParishSOFT’s AIM IQ (Intelligent Query). The program is so user friendly, JoEllen explains, that she gets all the data she needs in seconds and can import it to her report in either Excel or Word.



“AIM IQ is the greatest thing ever!” she said, during her presentation at the 2008 ParishSOFT Users’ conference. “Now I can construct my query in plain English at a moment’s notice, and I can rely on up-to-date information in the reports I send to the Bishop, deans and others.”

Appeal participation increased 29.5%

As to her opinion of ParishSOFT’s church management software, JoEllen says the proof is in the pudding—a 29.5% increase in pledges in two years’ time.

New technology paves the way for creative appeal strategies

“The time and energy we saved on data entry level tasks freed us to be more creative in reaching out to parishioners. For example, we were able to have pastors make the appeal instead of the bishop. The response was very heartening.”

About ParishSOFT

Founded in 1998, ParishSOFT offers a complete suite of church management software and services that reduce administrative workload and connect the Church with staff, parishioners, and the communities they serve. ParishSOFT continually invests in improving its software and web solutions, as well as adding new features and products. ParishSOFT presently serves almost 4,000 parishes throughout the United States.

Calculate your increases in annual appeal participation and annual giving on <http://www.parishsoft.com/calculator>. For more information or a product demonstration of the [Diocesan Development Manager \(DDM\)](#) product, please contact us at:

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