



Empowering Churches with Solutions to Simplify  
Complex Diocesan and Parish Church Management

ParishSOFT Case Study:

**Archdiocese of Atlanta**

**ParishSOFT®**

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## Transition to ParishSOFT Accounting

The Archdiocese of Atlanta has been on a standardized system of accounting since 1990. A common system and accounting platform result in a shared language among parishes, schools and the archdiocese, and continuity among pastors. This in turn yields better controls, informed leadership and the safeguarding of parishioner and donor trust.

Firmly grounded in a standard accounting system, the archdiocese was poised to take the next step. In 2014, the next phase of the archdiocese's accounting journey began by moving from LOGOS, a desktop accounting system under the ParishSOFT umbrella, to web-based ParishSOFT Accounting.

After 6 months of planning to ensure the optimum experience for their parishes and schools, the archdiocese opted for rolling group transitions. This approach guided groups of parishes and schools together through training and implementation of their new software in quick succession over the next 7 to 8 months. ParishSOFT and the archdiocese worked together to help parish and school staff learn the standard operating procedures and processes they needed in order to maximize their new web-based tools. Today, 120 parishes and schools now utilize the online ParishSOFT Accounting platform.

Nearly 30 years of exceptional accounting operations have produced a diocesan-wide infrastructure of expertly crafted and communicated accounting guidelines and best practices. Integral to this framework are the relationships forged with school and parish staff. Building upon relationships of mutual respect, with service as the aim, the Archdiocese of Atlanta honors parishioner trust, upholds the integrity of the archdiocese and assists their parishes and schools to enact informed, responsible accounting practices.

## Challenges

The Archdiocese of Atlanta's Finance Office is steeped in highly qualified accounting staff whose professional backgrounds range from corporate to nonprofit and church accounting. Unlike the business model, where accounting compliance can be dictated and strictly enforced, the office recognizes its role as the servant of the archdiocese. Experience has proven that a nuanced and sensitive approach is most effective in implementing the highest standards of accounting for the Church. For an arch/diocese, final authority for the imposition of policy rests with the archbishop to shepherd the parishes in his care.

The office offers pastors and staff a depth and wealth of accounting support and services. Accepting the office's role within the archdiocese nevertheless means it is ultimately the choice of the pastor to take advantage of these resources, or not. Likewise, it is the pastor who must answer to the archbishop for the stewardship of his parish and/or school.

Far from being a deterrent, however, the Finance Office embraces these boundaries. Collaborative efforts, strong relationships and a standard of excellence have forged a history of dedicated care for the archdiocese's parishes, schools and staff. And staff's trust in the archdiocese is honored with whole-hearted and comprehensive service.

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## Beatitudes, not Ten Commandments

The defining approach of the Finance Office is one of relationship. Implementation of accounting guidelines flow from a model of collaboration and are communicated out of real-life, time-tested best practices and processes, tailored to the unique needs of the Church. As Patrick Warner, Parish Accounting Manager, phrases it, “Guidelines are conveyed as Beatitudes, not Ten Commandments.”

Parishes and schools are empowered to meet accounting guidelines and standards through consistent and readily available assistance from the archdiocese. Committed aid includes dedicated staff, online and in-person training, step-by-step guides, comprehensive policies and hands-on assessments.

## Groundwork for Relationship

When asked the key to their long-standing success in enacting solid controls and best practices, Warner states, “Developing relationships [with parish and school staff] and being available to help.” Services are evaluated against the central question – How can we be of service? They are sustained through conscientious communication and the cultivation of good rapport with pastors and staff.

For the Archdiocese of Atlanta, the groundwork for relationship begins with the hiring process. Part of maintaining good internal controls, it is the policy of the archdiocese to be alerted of staffing changes and to be an active participant in the hiring process. Not only is this a prudent accounting practice, it is also a valuable service to offer parishes and schools in helping vet qualified candidates.

The benefits of archdiocesan participation in the hiring process are many. First, the interview process provides the opportunity to meet potential new employees face-to-face or via telephone call to initiate a partnership of mutual service to their parish or school. Likewise, it sets the expectation of the archdiocese as the provider of policy and the place where questions can be answered. It also conveys an important message about the collaborative role of the archdiocese in protecting parish and school finances.

Perhaps due to the culture of accessible support and informed guidance, staff turnover is rare. Regardless, being engaged in the hiring process ensures that the archdiocese and the parish or school are always on the same page. It also gives archdiocesan staff the ability to immediately equip new accounting staff with in-person, personalized training as needed to ensure continuity in parish and school accounting operations.

## Consistent Communication

Regardless of the organization or entity, with space and time it is easy for individual groups to become isolated and standards to deteriorate. The Church is no exception. By cultivating the relationships begun through the hiring and training process, however, the archdiocese is able to create a network to undergird established guidelines and safeguard standards. Consistent communication and in-person events that facilitate professional development ensure these relationships continue to deepen in greater service.

In addition to being responsive to the needs of individual parishes and schools, the archdiocese leverages the advantage of a common ParishSOFT platform to provide information and relevant messaging for the whole

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archdiocese. Communications include weekly communiqués to all parishes and schools for routine updates, “how-to’s” and reminders. The archdiocesan website offers extensive, easy-to-access instructions, best practices and standard operating procedures.

## **Insight Conference**

Commitment to fostering relationships with parish and school staff and encouragement to be a resource for each other are reflected in the archdiocese’s annual (sometimes bi-annual) Insight Conference. The conference is an opportunity for staff to gather for a day of training, networking, and in-depth learning on special topics. Their common ParishSOFT platform and standardized system of accounting vastly simplifies training, enabling greater depth of learning for specialized roles and tasks. In addition, a shared system adds value to networking opportunities where staff can compare notes on addressing common administrative and ministry challenges.

The event is also an occasion to honor the expertise of parish and school staff. These individuals, identified as subject matter experts, may be asked to present on different topics at the conference. Promoting and building upon the mastery of parish and school staff also acknowledges that it can be easier to receive information peer-to-peer. And the archdiocese is only too happy to celebrate their parish and school staff’s proficiency and many successes.

## **Implementing Guidelines, the Compliance Audit**

Even the most carefully designed system is apt to go awry if not maintained by solid internal controls and supporting infrastructure. The compliance audit is an opportunity for the archdiocese to identify issues and potential weaknesses. Internal Audit Manager Holly Orsagh, says auditors see themselves as consultants to the archdiocese’s parishes and schools. Their multi-faceted position helps parishes to identify points of vulnerability, provides education and defines the path for achieving and maintaining sound financials, guarded by appropriate accounting safeguards.

Compliance audits take place every 2 years, or 6 months after a new pastor is installed (occasionally 6 months after a new business manager as well). In the case of staffing changes, this gives the new pastor or staff time to acclimate and to identify questions or areas of concern before auditors come. As Warner notes, “Parish [and school] staff want to do the right thing.” The audit process can be a necessary corrective agent and enables the archdiocese to connect staff to training and resources as needed.

With web-based ParishSOFT Accounting the archdiocese has real-time access to parish and school financials. The audit team is consequently able to run reports and assess finances, checks and deposits in preparation for a visit to the parish or school. During their visit, one of the primary tasks of the audit team will be to observe the counting process in addition to other standard operating procedures.

Extensive guidelines and training are available to ensure best practices protect donor offerings and do not compromise the trust parishioners have placed in the parish or school. Knowing that money counters, and ministries that handle money collection, are following suggested guidelines is also a significant measure needed to protect counters in the event an abnormality is detected. As is always the case, no guideline is in place without archdiocesan support and access to additional training whenever needed.

Following the compliance audit, a report of audit findings is presented to the pastor and business manager.

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The archdiocese may also follow up with the pastor to address specific concerns and to establish a plan for moving the parish to a place of excellence in implementing and maintaining good internal controls. This plan may include additional training, adherence to established guidelines, or a referral to the archdiocese's Shared Accounting Service.

## Shared Accounting Services

The Archdiocese of Atlanta is quick to point to their sister arch/dioceses as a source of learning and best practices. Shared accounting services were an idea taken from the Archdiocese of St. Louis. Qualifying parishes are able to use this service free of charge and may also receive supplemental assistance to enact best practices and standards. This lets the archdiocese assist parishes that do not have the resources to retain their own qualified staff, and it helps ensure that every parish benefits from accounting standards that are properly maintained.

ParishSOFT Accounting guarantees that the parish always maintains ownership of their finances. The online platform enables collaboration with the archdiocese, while also putting permissions, records, and ultimate responsibility in the hands of the parish.

## Next Steps

The archdiocese is three-quarters of the way through their transition to ParishSOFT Family Suite. Susan Shirley, Parish Systems Administrator, notes that the integration of ParishSOFT's online accounting, church management and giving applications is an asset for more easily comprehending parish census and financial health. Seamless sharing of information is a huge plus; however, the archdiocese strongly maintains the need for separation of staffing duties between accounting and census in order to maintain good internal controls.

Simultaneous to the transition to Family Suite, parishes are moving unequivocally toward online giving. Some report over 50% of parishioners already choosing to donate online. Among its many benefits, online giving facilitates longer term financial planning and provides an in-depth view of parish financial status and giving trends. Likewise, it is a convenience for parishioners who increasingly opt for the flexibility and anytime availability of online services. The Finance Office plans to develop a survey to understand how parishes are currently using online giving in order to better support and guide pastors seeking to promote online giving at their parishes.

Central to parish fundraising efforts, and well within the scope of their ParishSOFT tools, archdiocesan staff is also focusing on the role of the ParishSOFT Offering and Pledges module in managing parish pledge campaigns. This functionality eliminates the need for a third party to manage the process, potentially saving a parish many thousands of dollars. The archdiocese is working on a curriculum to guide parishes through the pledge campaign process that utilizes their ParishSOFT software to manage all administration and reporting seamlessly online.

## Conclusion

Reflecting on a legacy of exemplary accounting and parish management practices, the archdiocese emphasizes the importance of dedicated archdiocesan staff to support parishes. The hard work and dedication of these

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staff members paves the way for ongoing improvement and parish/school development grounded in standardized systems. Continual formation of resources strengthens archdiocesan efforts, made simpler and more efficient through their shared ParishSOFT platform. These cohesive efforts form the framework for archdiocesan, parish and school staff relationships where collaborative service through excellence is the standard.

## **Additional Information**

ParishSOFT has helped thousands of parishes and dioceses implement ParishSOFT's online solutions. For an analysis of your software and services needs, please visit [parishsoft.com](https://parishsoft.com) or call us at 866-930-4774 x6.

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### Questions for ParishSOFT?

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