

“The Power of Cloud Technology in the 21st Century for Parishes and Schools”.



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Deacon Bill Koniers

- Business Executive, 40+ year career at GE, Pirelli, Air Products and Chemicals Healthcare Group
- Deacon of the Diocese of Bridgeport, 2004 – present – Ministers at The Cathedral Parish
- President of CathoNet, 2010 - present



What Big Picture Challenges Face The Church?

- Parishes + schools across the country are closing at an alarming rate due to lack of parishioners, students, and money.
- Inconsistent financial + administrative environments are common across many of the 195 dioceses, 19,000+ parishes, and 7,500+ Catholic schools across the US.
- Critical financial and operational data is often not shared with the right people at the right time and, when it is, it is reported long after time-sensitive decisions need to be made.



What Big Picture Challenges Face The Church?

- This environment leads to a lack of accountability, transparency, internal controls, data integration and data sharing amongst key parish and school stakeholders.
- We **MUST** get better at providing our good Bishops, Pastors, School Superintendents and Principals with useful management and timely information tools so that they can become better stewards of the sacred resources entrusted to their care.



Fundamental Principles

- Effective Management of our **Parishes + Schools** is a **MUST** in the modern world if we are to become Effective in carrying out the Church's Sacred Mission which is threefold;
 - Pastoral
 - Sacramental
 - Educational
- There are 21st Century tools that will help us ***"Manage the Business of the Church without turning the Church into a Business"***



We NEED Culture Change

- Definition of **CULTURE CHANGE**
- To deploy a modification or change within an organization through innovation, invention, discovery, or contact with other organizations learning their **BEST PRACTICES**



We start by Removing From Our Vernacular

“But we have always done it this way”



Typical Challenges – Parishes + Schools

- Erratic Conformance to Diocesan Policies by Parishes and Schools – *(Everyone is doing their work differently)*
- Reliability + Security of Older Computer Systems in Parishes and Schools + relying on Outdated Software
- Delayed, Non-standardized information leads to employees working harder, not smarter
- Delays in Delivering Assistance Where Needed
- We're always **“Always Putting Out Fires”** instead of **“Planning Ahead”**



Improving Management (+ day to day work) by Improving Processes

- Accounting/Bookkeeping
- Payroll
- Church Management –
Parish Census, Offertory Tracking, Sacramental Records + More
- School Tuition Management + SIS Tracking
- HR & Employee Benefits



Accounting



- Attributes of an GOOD General Ledger System
 - Up-to-Date Fiscal Information is Readily Available For Pastors, Parish Finance Councils, School Principals + School Boards
 - System **MUST BE** Easy-to-Use So Employees Can Actually Use It
 - Financial Reports are Easy to Produce and Easy to Understand
- Fortune 500 Class Reporting is Currently Growing In Dioceses Across the United States



Payroll



- There isn't a human being in the world that enjoys the pressure of calculating a parish's or schools Payroll – "It's getting complicated"
- Managing federal, state, + local tax + other withholdings such as Social Security, Medicare + pension contributions CAN BE simplified.
- Payroll today should be a no-brainer for our Church through outsourcing a gold-standard vendor in the cloud.



Church Management



- We must keep better track of our parishioners called Parish Census including contact information + other vital information - **NO MORE INDEX CARDS**
- There are more offertories and capital campaigns to count + assign to the correct families
- Sacramental Recording keeping is a SACRED function
- Religious Education classes are bigger + bigger
- There are vendors using 21st century tools to help us



Tuition Management + SIS



- Tuition revenue is the fuel that keeps our school doors open
- Administrators + Educators should be focused on developing students, rather than chasing tuition \$'s
- Catholic Education must adopt better collection processes to maintain its presence across the nation.
- Teachers must be given the tools to automate and streamline the complex student record-keeping + reporting critical to maintaining 1st class schools.



HR + Employee Benefits

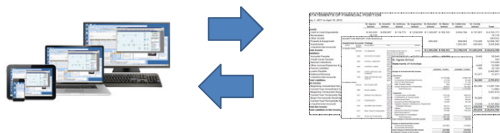


- There exists a increasing complexity of benefit plans, plan options, eligibility rules, premium cost sharing arrangements, billing strategies + compliance, that are driving UP COSTS
- Administrative mistakes, legal actions, + enrollment inaccuracies are costing our parishes + school TIME and MONEY
- Employees are our most important assets
- Today's Ben/Admin Systems can reduce expenses while empowering Pastors + School Principals through streamlined services



We Must Begin to Leverage Technology for Standardization Across Dioceses

- Choosing The Right Software For Standardization
- So how do we define Cloud Technology?



Cloud Technology – What is IT???

All organizations + now the Church are concerned about keeping costs under control and to be as efficient as possible in their spending. During the last decade, there has been a new shift in the IT world, focused on new lighter-weight technologies: **Cloud Computing, Software as a Service and virtualization.**



Cloud Technology – What is IT???

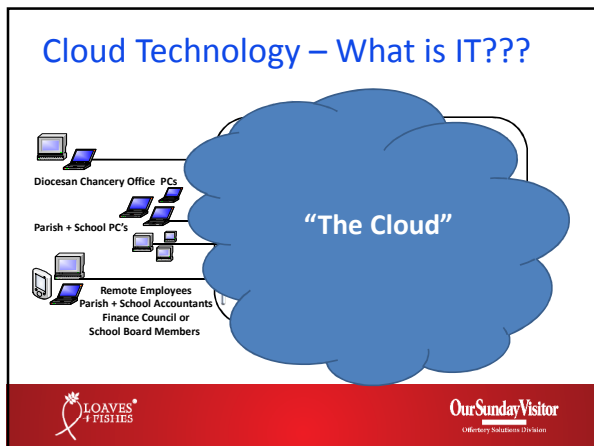
Cloud computing is a type of computing that relies on sharing computing resources generally through the internet instead of having local servers or personal devices to handle applications.

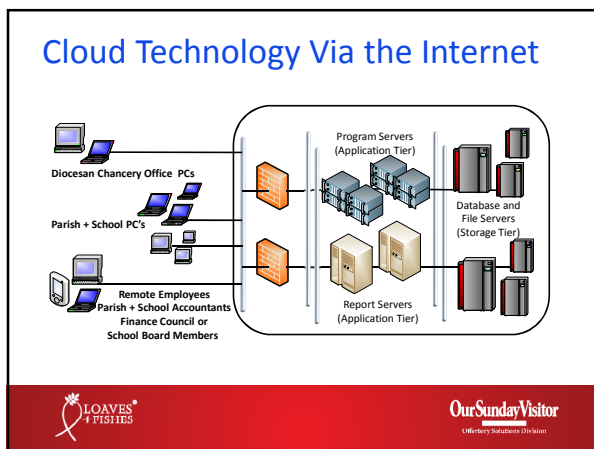


Cloud Technology – Two Types

1. Application Hosting
2. Web Based








Cloud Technology Benefits

- Simplifies Information Technology Challenges
 - Less to manage on local systems + old PC's
 - MUCH Improved Security
 - Improved Flexibility – Anywhere, Anytime, Anyone
- Provides Real Time Communication
 - Standard Implementation
 - Secure, Instant Access to Information
- Enables Improved Transparency and Controls



LOAVES + FISHERS

OurSundayVisitor
Offshore Solutions Division

Cloud Technology Benefits

• BEFORE THE CLOUD

1. Work only from the parish or school office
2. Data is at risk from viruses + malware
3. Local network is at risk from internet-based threats
4. PC's today lack security and system updates
5. Data is not consistently backed-up
6. Technical support is not readily available + can be expensive
7. PC failures and disasters severely interrupt work
8. Employees are distracted by IT hassles



Cloud Technology Benefits

• AFTER THE CLOUD

1. Work securely in the parish office, home or anywhere
2. Data is protected by enterprise-class antivirus
3. Cloud networks are firewalled, monitored 24/7 + tested
4. Systems are maintained by IT professionals + experts
5. Data is backed-up in real-time . . . (Remember Hurricane Katrina?)
6. In most cases, UYS based support is always available
7. Switch to another PC or location uninterrupted
8. The parish or school workforce stays focused on the:

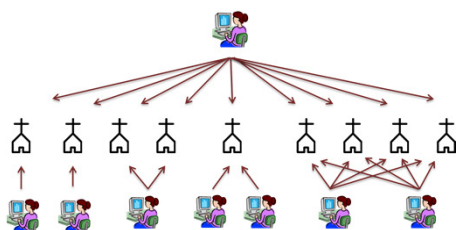


PASTORAL, SACRAMENTAL + EDUCATIONAL MISSION OF THE CHURCH



Cloud Technology Benefits

A Picture is worth a 1,000 words



Cloud Technology Allows:

A parish or school to align its mission, ministry and technology *

** My guiding principle when I developed the nation's first ever accounting system for the Church "in the cloud" at the Diocese of Bridgeport*










Case Study:
My Diocese of Bridgeport Story



- In 2006, The DOB discovered 2 embezzlements + Bishop Lori invited me to retire + work for Him solve it
- There was a need to Re-Engineer the Fiscal Management of Parishes/Schools for accountability, transparency, internal controls and good management reporting
- I knew what worked in The Corporate World and as a Deacon could be transferred for the Church
- So my goal became. . . . ***Managing the business of the Church without turning the Church into a business***

Case Study: My Diocese of Bridgeport Story

- **Diocese of Bridgeport, CT 2006/2007**
 - We sought Fiscal Oversight, Standardization, Best Practices
 - Needed the Best Accounting Software
- Evaluated 10+ Vendors – Selected the Best Outsourcing Solution with the best accounting software – application hosting
- Success Inspired Many Other Dioceses, Large + Small
- Growth Eventually Inspired the Creation of CathoNet to Specifically Focus on The Needs of The Church



Fiscal Management Cloud Provider + Software

- Industry-Standard Accounting Software
- Industry-Specific Accounting Software
- Key Comparison Criteria
 - Vendor Viability-Will they be around in 10 years?
 - Vendor “Bandwidth” + The ability to encrypt data
 - Vendor Ecosystem + Technical Support
 - Familiarity of Solution / Cost of Adoption
- Think “Southwest Airlines”



How to “get it done” + Facilitate The Cloud + Culture Change in a diocese

- Successful Implementation of implementing new standardized business processes in the cloud are helped by facilitating Pastor + School Principal Buy-in at the local level; then:
- Is further Bolstered with Diocesan Buy-In:
 - Bishop’s + CFO’s + Chancellor’s + School Superintendent Endorsements through education is the Ideal scenario to seek change
 - Everyone is a “player” in Facilitating Culture Change



How I tell my story to Bishops, Pastors, School Superintendents

- Southwest Airlines – Growth Through Tough Times
 - Standard, Industry Leading Aircraft (Boeing 737)
 - Standard Training, Procedures, Equipment, Terminology (Pilots, Technicians, Ground Crew, Flight Crew, Maintenance, Parts, etc.)
- Southwest’s Processes
 - Focus on the Mission
 - Transporting People, Not Flying Airplanes



Questions and Answers

Thank You!