SERENIC SOFTWARE CASE STUDY

SERENIC NAVIGATOR IMPROVES FINANCIAL CONTROL FOR ARCHDIOCESES AND DIOCESES

Business Situation

Religious governance organizations such as archdiocese and dioceses operate in a variety of scenarios. Whether control of financial information is centralized, de-centralized, or a combination of both, their needs are best met by an integrated financial and revenue management solution. Strong financial reporting, the ability to manage individual church/parish deposit and loan activities, the management of bill-back transactions for services rendered, and the ability to support the business relationships between the governance operation and the local churches and schools are just a few of the features critical to their ability to serve their missions.

Solution

Many archdioceses and dioceses have selected Serenic Navigator, certified for Microsoft Dynamics NAV, as the system best suited to provide the flexibility, scalability and business application depth they require.

Benefits

- Increased functionality, including a common, flexible fund accounting solution
- Advanced budgeting capabilities and automated workflow processing
- Drill down capabilities consistent throughout
- Central standard reporting options eliminating multiple reports
- Interface with investment, and deposit and loan management system
- Microsoft look and feel provides easier training and use

DIOCESE OF FARGO

The Diocese of Fargo was founded in 1897 and includes 13 schools, 136 parishes in the eastern half of North Dakota, with 102 priests serving a Catholic population of 85,570. Prior to implementing Serenic Navigator, the organization struggled to find an accounting software product that could handle both the routine and specific requirements needed in the three different types of entities it serves: a traditional diocesan multiple funds and multiple department structure, a foundation structure, and a deposit and loan structure.

"As a result, we had to bandage products or elements of products together, duplicate entry efforts, and manually track and/or enter routine items," said Scott A. Hoselton, the finance officer at the Diocese of Fargo. "Serenic Navigator has the flexibility and functionality to handle all of our needs in one program, with the underlying power to meet everyday and unexpected needs as they arise."

Prior to implementation, the diocese hoped to save about one week's time per year. Hoselton estimates the organization is actually saving four weeks per year on the Investment Management (Deposit and Loan) portion of Serenic Navigator alone, with additional savings in other areas

SERENIC™ NAVIGATOR™

Diocese of Great Falls-Billings

Founded in 1904, this diocese serves more than 100,000 Catholics throughout the eastern two-thirds of Montana. The Diocese has 85 priests and is comprised of 65 parishes, 45 missions and 10 parochial schools.

The diocese business office needed a fund accounting solution that was as broad and all encompassing as its responsibilities. It was looking for a flexible solution that could be customized for its five differently-structured financial organizations, each with its own set of policies and procedures. With limited personnel, it also needed to produce more results with fewer resources.

Joe Loncki, diocese business manager and finance officer, cited Serenic Navigator's strengths as the software's navigation, or drill down capabilities, screen consistency throughout all modules, and standard report-writing options.

Loncki said using Serenic Navigator, the organization can complete all of its payroll activities in about two hours – a time savings of at least 50 percent. "The productivity increase in our office (from the implementation of Serenic Navigator) allowed us to consolidate all bookkeeping responsibilities into two positions – converting a third position into a critically needed administrative support position without incurring any increase in staffing costs," Loncki said. "Perhaps the most tangible measure of Serenic Navigator's return on investment is that I will recoup the cost of implementation in a mere 25 months."

Catholic Diocese of Orlando

The Diocese of Orlando was established in 1968, and originally included 50 parishes and served 128,000 Catholics. Because of the explosive growth of the Orlando metropolitan area, engendered by the opening of Walt Disney World and other tourist destinations, the diocese became one of the fastest growing in the nation. Today, it includes 80 parishes, 10 missions, and 37 schools spread over nine counties of Central Florida. It serves a population of approximately 800,000 Catholics.

In early 2008, the diocese needed to replace its existing AS400 system with software that would provide the advanced budgeting capabilities, automated workflow processing, and investment management capabilities required to effectively manage the fund accounting needs of the diocese.

"We were impressed by Serenic's focus and commitment to the diocesan community" said Jack Paige, director of IS and technology for the Diocese of Orlando. "Serenic's Investment Management product, for example, is a fully integrated component of the Navigator financials solution and is a great fit for our Diocesan Savings and Loan program. This was not something we could find in other products. And since Navigator is based on the powerful Microsoft Dynamics NAV system, we will also have full integration with Microsoft Office. After talking to other Serenic clients and completing an intensive review of the product, we are confident that Navigator will empower us to provide the level of accountability and transparency our constituents deserve."

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Catholic Diocese of Green Bay

St. Therese of the Little Flower, Inc. provides accounting and communi-
cations services for the Catholic Diocese of Green Bay, Wis., its agencies
and parishes. The diocese is composed of 350,000 Catholics who carry
out the mission of its 160 parishes and 62 schools. The diocese employs
180, while its parishes and schools employee approximately 3,000 in its
16-county area.

In 2008, St. Theses of the Little Flower selected Serenic Navigator to
centralize and standardize accounting for all parishes and schools in the
Diocese, replacing the 15 types of software acquired independently by
the parishes and schools.

Serenic Navigator was chosen to ease communications challenges the
diocese had been experiencing and to help it overcome the problems
of compiling multiple reports from parishes and schools with different
accounting capacities. Moreover, pastors and other leaders are now
taking on more parishes and schools and need a common accounting
system to manage them. In addition, access to technological expertise
may not be readily available in many parishes. To resolve these issues,
St. Therese plans to use Serenic Navigator to deliver its accounting
capabilities through the Web, so that all parishes will communicate via
the Internet, with a common database accessible online.

"Much like any other business, the day-to-day operation of a parish has
grown in complexity over the years," said Deacon Tim Reilly, director of
administration for the diocese. "Through the collaboration of our parish,
school and diocesan leaders, we are adopting solutions such as Serenic
Navigator to help us streamline important business functions and use
technology to our advantage."

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