



# Case Study: Collaborative Administrative Initiative

**June 2, 2026**



# Sr Joanne Brazinski



- Congregation Profiles
- Reasons to Collaborate

# Management Collaborative for Religious Congregations Involved



SISTERS OF THE HOLY SPIRIT  
*of the Diocese of Pittsburgh*

Founded: 1913 as a Diocesan Congregation  
Members: 21  
Median age: 76  
Ministries: Retreats (education, healthcare – volunteers)



Founded: 1870  
Members: 30  
Median age: 86  
Ministry: Hospitality



*The School Sisters of St. Francis*  
U.S. Province

Founded: 1842 in Austria, 1915 in Pittsburgh  
Members: 50  
Median age: 83  
Ministries: Education, Pastoral work, Nursing, Prayer ministry, Spiritual & social outreach



Foundation: 1922  
Members: 48= 35 Brazil, 13 USA  
Median age: 84  
Ministries: Pastoral work, Education, Spiritual outreach

Sisters of Saint Francis  
of the Providence of God

Prior to  
MCR



who was  
taking care  
of Finances



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Members of the congregation

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Lay persons in the Finance  
Office

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Bookkeeper hoping to retire age  
70, after 20 years of service

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For last decade - Pittsburgh  
Financial Firm

# Reasons we chose to create MCR

- Mark Schafale – presentation at LCWR regional meeting – catalyst
- Possibility and need for collaboration expressed
- Realization of changing needs
- Recognition of change and updates needed in financial area
- Finance Firm – individuals who did not have experience with religious groups
- Four congregations had worked together on other projects
- Experience of a good spirit, energy and enthusiasm to begin something that would benefit all

# Jared Stango – MCR CFO

- Mission & Service Offering
- Formation Timeline and Key Milestones
- Congregation Onboarding Timeline and Transition Framework
- MCR Accomplishments and Future Potential

# Mission Statement

The Management Collaborative for Religious is dedicated to supporting the financial and administrative needs of the member religious communities so that leadership's **time and energy** may be more **focused** on their **mission, ministry,** and **care of fellow Sisters.**

# MCR Mission & Service Offering

- **Leverage Technology to Enhance Efficiency and Optimize Staffing**
- **Identify and Implement Best Practices Across the Congregations**
- **Clearly Communicate Financial Position and Trends**



# MCR Genesis

## ➤ January 2024:

- Pittsburgh area religious communities receive a presentation on potential collaboration across communities

## ➤ Spring 2024:

- The four “Founding Communities” begin to consider a collaboration

## ➤ Summer / Fall 2024:

- Founding Communities brainstormed and envisioned the structure and relationship



## ➤ Winter 2024:

- Established Name: Management Collaborative for Religious
  - “Management” description was chosen vs purely financial so it could grow into other service areas later
  - No geographic reference to Pittsburgh to allow for expansion across geographies in the future

## ➤ January 2025 – March 2025:

- CFO Recruitment, selection and onboarding.

**Time from Concept to New Creation:  
~15 months**

# Org Chart

## CFO Bio

- CFO of several Private Equity owned businesses with diverse experience in Finance, HR, and IT
- MCR: More than a job, a calling to serve
- Education: Saint Francis University (Loretto, PA)

## Staffing Snapshot

- 3 total to handle 4 Congregations
- Stive for position flexibility, but also consistent coverage with physical presence
  - 1 Bookkeeper primarily onsite at OSB and the other at SHS
  - CFO alternates among the locations

**Members:** Canonical Leader (or designee) of each Member Congregation

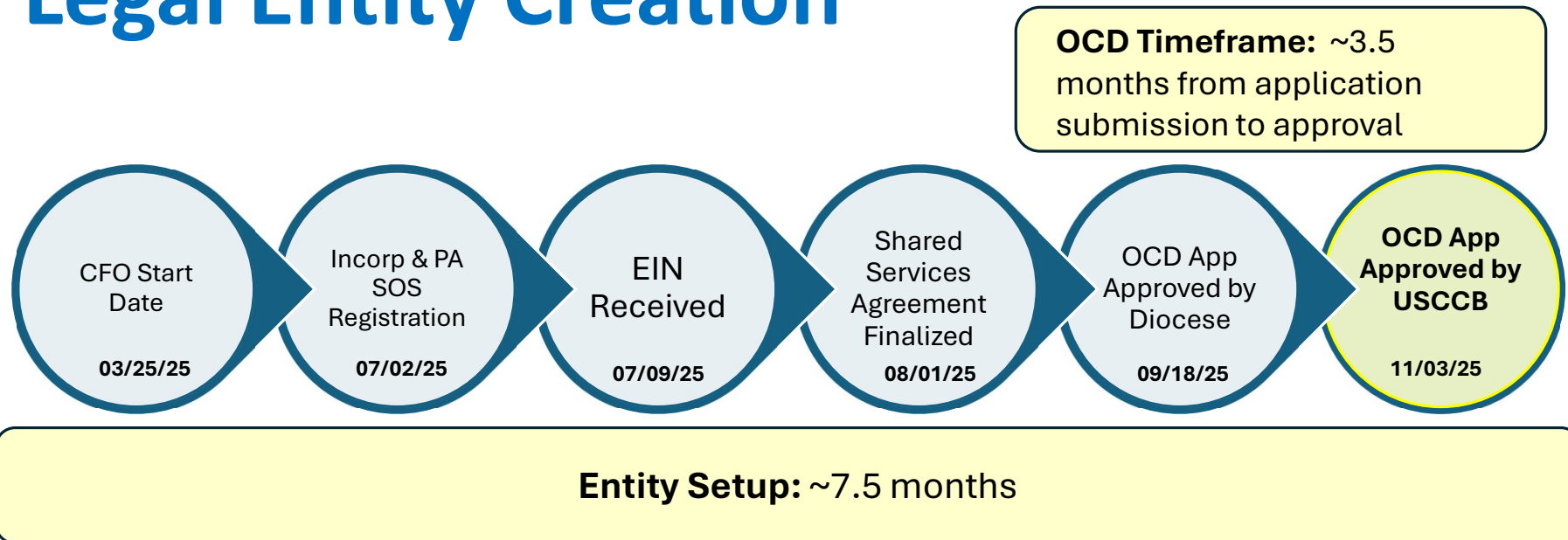
**Board of Directors:**  
Women Religious (5)  
Independent Lay (4)

**CFO**

**Bookkeeper**

**Bookkeeper**

# Legal Entity Creation



- **Utilized Rosemary Corsetti with Buchanan Ingersoll & Rooney:** Organizational Registrations, Bylaws, OCD Application. Total Cost < \$10K.
- **Shared Services Agreement:** Created to Document the Roles & Responsibilities between the Congregations and MCR. Used template to create, attorney reviewed.
- **Official Catholic Directory (OCD) Application:** Inclusion extends IRS group Ruling to MCR - Federal Tax Exempt, 501(c)(3) Org

# Shared Services Agreement Key Provisions

## ➤ Define Scope of Services Provided

- Includes Exhibits with services specific to each Congregation

## ➤ Cost Allocation

- MCR doesn't generate a "profit." All costs are allocated to the member Congregations

### Direct

- Time Tracked
- Mileage

### Shared: Allocated Equally

- Corporate Organizational Costs (Legal, etc)
- Computer Equipment & Supplies
- Conferences (LCWR, RCRI)
- PTO, Professional Development

- Monthly Cost Reporting

- During Initial Onboarding Phase: Contribution by Congregation changes each month
- Once each Congregation Fully Onboarded: Fixed monthly rate reviewed and adjusted at regular interval (quarterly, semiannually, or annually)

## ➤ Independence

- Congregations continue as separate organizations (not a merger). **Leadership of each Congregation can accept or reject MCR recommendations**

## ➤ Confidentiality

- MCR doesn't share information about one Congregation with another Congregation without prior approval

# MCR Operating Structure

- **Initial: Operated as Department within the Sisters of the Holy Spirit (SHS)**
  - Necessary while creating the MCR entity
    - Incorporation and EIN Application
    - OCD Approval Process
  - MCR Staff employees of SHS, follow SHS handbook
  
- **After First Year: Transition to Independent Entity**
  - OCD Inclusion is a prerequisite
  - Independent Financial Structure
    - MCR Bank Account
    - MCR QuickBooks License
    - MCR G/L, D&O Insurance (Christian Brothers)
  - Employees transition from SHS to MCR
    - Calendar year end preferred
    - Consider including other Congregational employees to gain employee benefit and payroll processing efficiencies
  - 990 Filing

# Congregation Onboarding

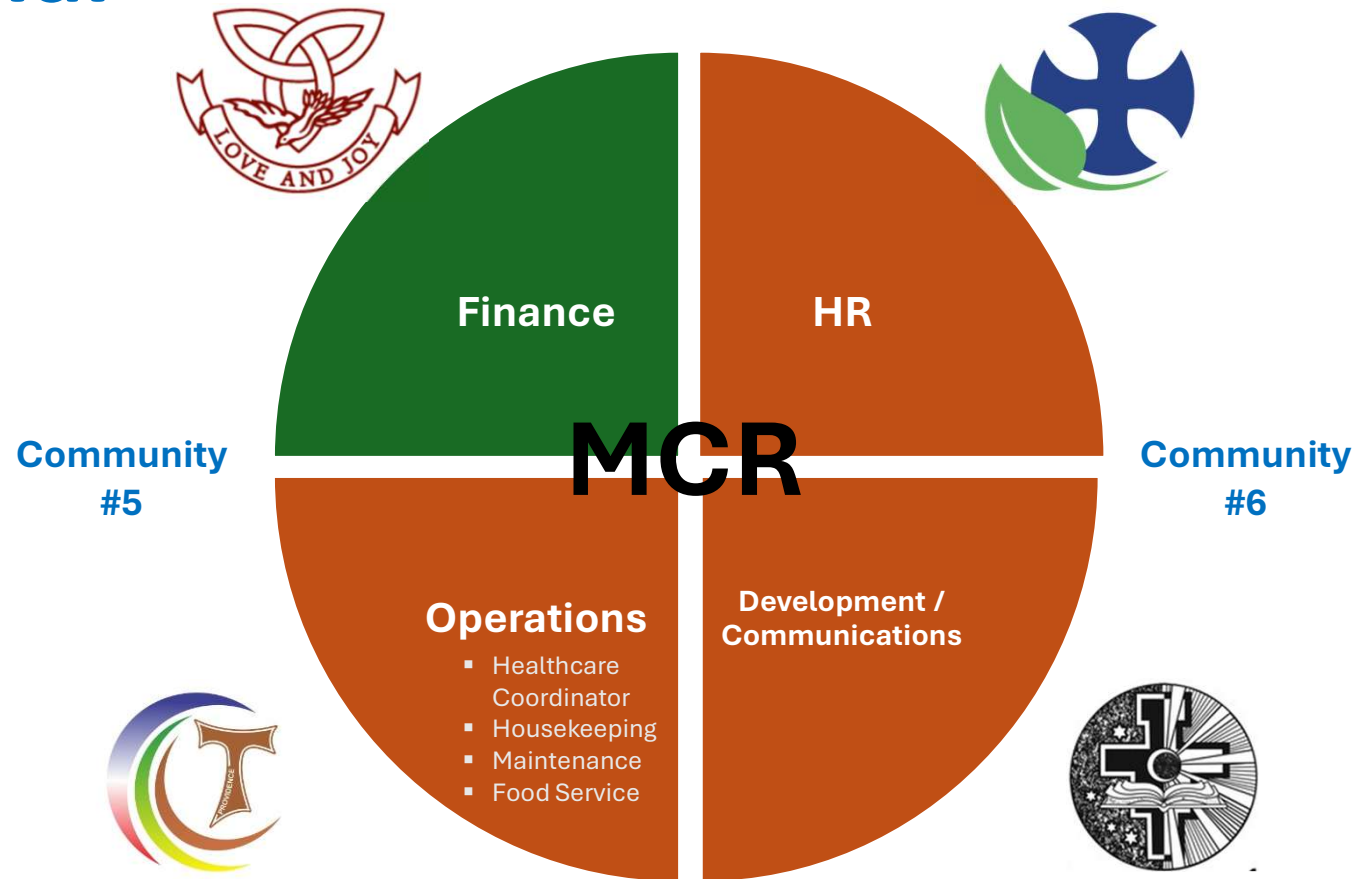


## MCR Transition Framework

- Meet with Congregation leadership and current finance staff to understand needs
- Gather Documents / Information
  - EIN, EE Handbook, Sales Tax Exempt Cert, GL Detail, Trial Balance, & regular monthly financial reports
- Establish Bank / Investment Account Access (if desired by leadership)
- Assess Current Systems to optimize MCR's ability to provide support
  - QB Online vs QB Desktop: QBO Remote access and automation features
  - Payroll: Eye for automation – time recording, tax payments and returns. Use common CTR platform if it makes sense
- Shadow Payroll and Vendor Payment process
- Regular Communication & Onsite Presence: Weekly update meetings / calls

# MCR Potential

- Add Additional Communities and / or Consulting Projects
- Increase Service Offerings
- Transition Existing Community Employees to MCR
  - Larger pool for insurance and benefits
  - Uniformity leads to greater efficiency



# Accomplishments

- **Implemented Common Platform of QBO and CTR Payroll**
- **Treasury Management Enhancements**
  - Optimize yield on available cash
  - Converted paper checks to electronic payments, including automatic utility ACH debits
  - Remote check scanning to decrease trips to the bank
  - Bill.com Credit Card Rollout: no card fees and cashback earnings
- **Cost Saving Initiatives**
  - Deep dive into vendor billing and contracts to identify opportunities for lower costs
    - Examples: Analyze need for consultant support, sales tax exemptions, electric and gas supply agreements, etc
- **Fruits of Collaboration: LIFE Pittsburgh (a PACE program)**
  - Based in part on the experience of one Congregation that has utilized the program for years, two other Congregations are enrolling sisters, benefiting from the health care provided and realizing cost savings

# Sr Joanne Brazinski



- Blessings and Challenges
- Lessons Learned



Blessings

- Collaborative spirit; learning from one another
- Mark Schafale's assistance with:
  - Clarity about needs
  - Search process and hiring of the CFO
  - Support for the congregations and the CFO
- Adaptability and expertise of CFO
- CFO identifying best practices to save money and time
- Preparation for future financial management as delegation

# BLESSINGS (Continued)

- Security in knowing finances are being taken care of very well
- Expertise of CFO
- Some specific blessings/changes
  - Simplifying check processes and online deposits
  - Obtaining better interest rate on money market accounts
  - Direct deposit for employee paychecks
  - Advanced use of technology
- **Allows those in leadership to give attention to other needs**



# Challenges



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Adaptation to new reality, new processes

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Educating Sisters and staff to changing procedures

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Reassuring the Sisters that their everyday needs will continue to be taken care of

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Good communication with all

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Transition from one way of doing things to another way for everyone

# Learnings

- Start-up took longer than expected
  - All the legal documents required
  - Certainly worth the time and effort
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- Don't need someone in the office on site
  - Availability of CFO – on site, by phone, messaging
  - There are more efficient ways to deal with finances



# **IMPORTANT** to Note:

- All groups have a canonical treasurer
- Mark Schafale's support - invaluable
- MCR CFO and Staff are diligent and very easy to work with
- CFO sees this work as a ministry with us
- Many, many more blessings than challenges

# Contact Info

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