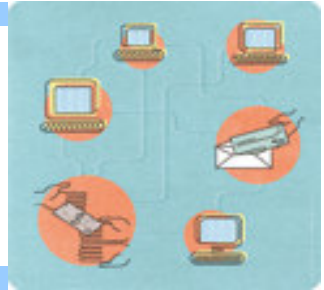


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Inspired by Data

The church is united but its databases were divided

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by EDGE Staff



When Ron Olsen, CFO of the United Church of Canada, recently led an effort to overhaul its IT systems, getting everybody on board was among the least of his challenges.

Olsen consulted with everyone, identifying 22 people in the process, and they all came to the same conclusion: they wanted a software package that integrated everything from financials and accounting to human resources, distribution and donor management.

The IT department of six, meanwhile, also had one over-riding objective, and that was to simply reduce the number of platforms that it supported.

And so, it became relatively easy to get buy-in. Olsen sent around a document with all the requirements thoroughly defined, and sign-off came quickly.

The technology, well, that was a different story. The United Church had 10-year-old system in place that was showing its age. In addition, with 13 offices across Canada, each location was independently managed, using multiple, disparate software databases. Getting accurate financial data was Olsen's biggest problem.

The United Church decided to replace it with a single system, settling on Navision for financials, distribution, human resources and donor management. It was implemented by Altus Canada, an integration firm specializing in non-profit and educational organizations.

When you're a decentralized organization, and financial systems and fundraising need to go together, then "integration becomes everything," says Olsen.

Complicating the issue is the fact that a church is dependent on so many kinds of giving: donations, free-will offerings, fundraisers, pledging and the sales of books and other merchandise.

"We did not deal with a specific ROI," he says. "Nor did everything need to be rolled out at once."

But getting the right kind of data and financial reporting was an important first step in getting insight into what was happening.

Olsen says the new system will also help the United Church roll out some new initiatives that are national in scope. These include a more efficient tax receipt system, PAR (pre-authorized remittance for regular givers); a national payroll system for both pastoral and non-pastoral staff; and a customizable POS system which would be used to keep better track sales of books and other items.

"Challenges such as poor integration of data are not unique to the United Church. It is common to many not-for-profit organizations," says Nicola Dickinson, partner, Altus Canada.

While data integrity is always the goal, different departments have different versions of the data, and what is needed are systems that not only unite accounting, human resources and distribution functions, but what Dickinson describes as "constituency management."

Churches and charitable organizations typically rely on memberships, and "the goal really is to understand the fiscal health of their organizations, and in turn, it helps them plan their programs accordingly," she says.