



Efficient association management with unitop – Caritas focuses on an integrated approach



The Caritas association for the diocese Münster e. V. is one of 27 Caritas dioceses associations in Germany. It focuses on Christian values and, as a charity organisation of the Catholic Church, it engages with people who find themselves in particular life situations. To be able to help swiftly and well, the dioceses association relies on qualified co-workers as well as efficient administration of membership and charitable contributions. The association depends on high-performance software in order to ensure efficient administration. Having consolidated the IT landscape, Caritas in Münster puts its trust into an integrated software solution with unitop NPO Association from July 2013 onwards.

THE SELECTION OF PROVIDERS

The Caritas association of the dioceses of Münster started with investigating a new software solution for the membership and donation administrative departments. All other business processes were checked when other areas also appeared to need change. The check identified that other areas, such as the administration of seminars, required improvement. During the course of a process to select software, they decided finally on GOB and its solution concept unitop NPO Association. In order to gain an insight and having visited a GOB customer who had already implemented the unitop NPO Association solution, the Caritas association Münster finally decided that the many individual applications should be put together in one integrated solution.

THE FLEXIBLE BRANCH SOLUTION FOR ASSOCIATIONS - UNITOP NPO ASSOCIATION

GOB Software & Systeme already impressed in the presentation phase. „GOB was the only software provider, who could plausibly explain how we would work with the system later on,“ reminds

Sonja Buschkötter, responsible for the project at the Caritas association of the dioceses Münster. „Moreover, unitop NPO Association was simply closer to our standards compared to the other solutions we looked at.“ Apart from being a convincing solution for the association, which met the requirements and expectations of the Caritas association of the dioceses, GOB Software & Systeme also scored points on account of its many years of experience in the market as well as its good references. An advantage of the product unitop NPO Association is that it comprises of a Microsoft based solution, which also integrates other Microsoft products, such as Word, Excel or Office. „It was crucial for us that we would have a sustainable and stable solution, which also could be adjusted later to our requirements,“ says Buschkötter.

ISOLATED SOLUTIONS MAKE WAY IN FAVOUR OF AN INTEGRATED SOLUTION

Up to the point of migration we used a separate software solution in almost every area. Because of the many isolated solutions there were many interfaces, which meant that the structure of highly



specialised isolated solutions was very much prone to errors. The Caritas association of the dioceses Münster wanted to achieve a consolidation of the IT landscape with the introduction of the integrated solution unitop NPO Association and to establish cross-functional processes of membership, seminar administration and financial accounting. While addresses were previously managed in a decentralised way, the GOB concept solution provides a central address base, where all addresses are managed and updated. This avoids doubling up of addresses in future. „With GOB we got the feeling that they understood our needs. And we have had completely different experiences in the past,” says Beate Evers, manager of membership administration, delighted. The greatest challenge was to abandon the existing software in financial accounting, as we were generally happy with the program. In the end, however, we were able to convince colleagues of the integrated approach. The joint project was then started in November 2012.

TRANSPARENT PROCESSES IN SEMINAR AND MEMBERSHIP ADMINISTRATION

Only a few specifications could previously be shown via the old software in the department of further education, which plans seminars and events for colleagues in associated services and facilities. This meant that invoices could not be issued from this program. The system would meet with difficulties as soon as education checks were entered. Here, transparent processes could be established thanks to unitop NPO Association. An optimisation was also needed in administration of membership. As the software in the membership administration department principally corresponds to the requirements of the Caritas association of the dioceses, unitop-Standard could be implemented here. In donation administration only the contribution scales were adjusted.

A TAILOR MADE PORTAL SOLUTION

A further central requirement was to optimise the portal solution in the area of further education and in the administration of membership. Although portals have been an element of the IT landscape

of the Caritas association of the dioceses of Münster for a long time, the processes were associated with high levels of manual input. Where contact data had to be entered manually into the system previously, automatic processes will take over in the future. The collection of membership contributions will take place via a portal in future, which also automatically collates and processes contributions. In the area of seminars, online registration will replace the despatch of e-mails. At the end of the year, a special registration process for children’s day care will be implemented, which previously required a significant manual work effort. “Obviously the process was known to us. But we found it great that we could simply illustrate this with the help of software,” enthuses Sonja Buschkötter. „We are significantly faster now with GOB’s portal solution and the collation of the data is much more manageable.”

TIME SAVINGS AND EFFICIENCY THANKS TO UNITOP

Despite the initial scepticism displayed by the Caritas association of the dioceses of Münster with regards to the time frame, the project plan was able to be met. The individual applications could be closed down within just eight months and were replaced by the platform solution unitop NPO Association based on Microsoft Dynamics NAV. The benefits of the new system are primarily noticeable in the processes of membership and seminar administration. The integrated approach clearly optimised the processes here. „We are working much more efficiently here. This means we are saving time, which we can invest in other areas and this ultimately has an effect on colleague satisfaction,” says Sonja Buschkötter summarising the central benefits of the new concept solution. The aim is that in future all co-workers at the business end will work with the integrated solution unitop NPO Association. About 80 users will then simultaneously use the central address management system.

Scope of services in the unitop NPO Fundraising project Caritas association for the diocese Münster e.V.

- ▶ Address Management
- ▶ Membership Management
- ▶ Event Management
- ▶ Donation Management
- ▶ Financial Accounting
- ▶ Fixed Assets
- ▶ Cost Accounting
- ▶ ERP
- ▶ Online- Membership Management
- ▶ Online-Seminar booking

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