



Microsoft Dynamics Customer Solution Case Study



Charity Supports Hurricane Evacuees by Using Project Accounting Solution

Overview

Country or Region: United States

Industry: Nonprofit

Customer Profile

St. Vincent Catholic Charities serves 13,000 clients a year, including international refugees, with services that support the whole person emotionally, physically, and spiritually.

Business Situation

To support approximately 130 people displaced by Hurricane Katrina, the organization needed a customized way to track and invoice for expenses.

Solution

Working with Microsoft® Certified Partner Maner, Costerisan & Ellis, P.C., St. Vincent customized the Project Accounting module of Microsoft Business Solutions–Great Plains®, now part of Microsoft Dynamics™.

Benefits

- Flexible, customizable project accounting
- Simpler tracking and compliance
- Valuable experience and partnership

“With Microsoft Great Plains, St. Vincent can rely on a solid solution that meets the agency’s current and future needs for business management, project accounting, human resources management, and more.”

Andrea Seyka, Chief Financial Officer, St. Vincent Catholic Charities

St. Vincent Catholic Charities serves children and families of all ages, origins, and backgrounds, in the Lansing, Michigan area. In the aftermath of Hurricane Katrina, government officials asked the organization to aid 130 people evacuated from the United States Gulf Coast. St. Vincent Catholic Charities had the expertise, personnel, and many of the necessary resources to quickly implement a program for the evacuees because of its long tenured refugee program, but it needed a way to track costs and invoice funding agencies. Working with Microsoft® Certified Partner Maner, Costerisan & Ellis, P.C., St. Vincent implemented and tailored the Project Accounting module in Microsoft Business Solutions–Great Plains®, now part of Microsoft Dynamics™. With this flexible, customizable solution, St. Vincent can track expenses easily and accurately and comply with reporting requirements that vary by funding agency.



Solution Summary

Number of hurricane evacuees served	Approximately 130
Number of constituents served annually	13,000
Software	Microsoft Business Solutions–Great Plains
Great Plains modules in use	Human Resources Payroll General Ledger Receivables Management Payables Management Project Accounting Sales Order Processing Integration Report Writer

Situation

Based on the foundational principle that every human life has value, St. Vincent Catholic Charities enhances the quality of life for individuals and families of all backgrounds and origins by providing emotional, physical, and spiritual support. (Figures 1 and 2 are indicative of the impact St. Vincent has in human lives.) Among other services, St. Vincent Catholic Charities is a leader in providing refugee and resettlement assistance in the Lansing, Michigan area. Services include arranging housing, healthcare, and community orientation. The nonprofit organization employs approximately 275 people and is funded through donations, grants and government dollars.

After Hurricane Katrina hit states in the U.S. Gulf Coast in late August 2005, thousands of evacuees in Louisiana and neighboring states needed to be relocated. The governor of Michigan and other state and local officials met to plan their response and chose St. Vincent Catholic Charities to lead resettlement efforts for the Lansing, Michigan area. The City of Lansing contracted with St. Vincent to provide these services. The decision was largely based on St. Vincent's refugee resettlement experience, which is a model for other organizations.

Says Cheval Breggins, Director of Marketing and Community Relations at St. Vincent Catholic Charities, "We are considered experts in the resettlement process because of our refugee program. In many ways, we were ready to handle hurricane victims because of our refugee resettlement model and case management experience, which includes an initial assessment of peoples' needs, helping them find housing and employment, and getting them oriented to the community—transportation, medical care, grocery stores, schools, and so on."

When St. Vincent Catholic Charities incurs an expense on behalf of a constituent, the charity bills the appropriate funding agency. Since 2004, the charity's Refugee Services Program has relied on the Project Accounting module in Microsoft® Business Solutions–Great Plains®, now part of Microsoft Dynamics™, to track and bill for expenses. With more than 100 hurricane evacuees expected to arrive, St. Vincent needed to quickly implement a solution to track funding sources and expenses.

Solution

In 2002, St. Vincent Catholic Charities looked for easy-to-use accounting software that could flexibly track and report information at multiple levels, had well-integrated modules, provided custom report writing, and integrated with the Microsoft Office System. St. Vincent also wanted to purchase the product from a company that would provide support locally. Microsoft Certified Partner Maner, Costerisan & Ellis, P.C. (MC&E) introduced St. Vincent to Microsoft Great Plains, which the charity deployed that same year.

St. Vincent uses the broad functionality of Microsoft Great Plains to manage human resources, payroll, accounting, and more. In 2004, St. Vincent implemented the Project Accounting module of Microsoft Great Plains to track and invoice for costs for its Refugee Services Program.

Most recently, working with MC&E, St. Vincent Catholic Charities implemented a customized version of the Project Accounting module in Microsoft Great Plains to support evacuees of Hurricane Katrina.

In just over one week, the combined team from MC&E and St. Vincent implemented and customized Project Accounting to support the Katrina evacuees. This timeline met St. Vincent's need to get a solution in place

“You can use Great Plains and, particularly, Project Accounting, in ways that you wouldn’t expect. Project Accounting is very flexible.”

Matt Mason, Consultant, Maner, Costerisan & Ellis, P.C.

Figure 1. St. Vincent Catholic Charities works to assist people in unfortunate circumstances. (Photo subject is not an actual constituent.)



before it began incurring expenses that needed to be tracked. The team applied its prior experience working with Microsoft Great Plains and, in particular, Project Accounting.

According to Andrea Seyka, Chief Financial Officer at St. Vincent Catholic Charities, “MC&E responded quickly. Matt Mason, Consultant, worked with our Staff Accountant, Dares Nopareporn, to get things set up and clients loaded into the system. We didn’t have a lot of time, but we worked really well with the time we had and made it work.”

For assisting Katrina evacuees, there are multiple funding sources, including donations and Federal Emergency Management Agency (FEMA) funds.

Using Project Accounting, the team was able to tailor Microsoft Great Plains for applicability to the Katrina evacuee project by changing names of fields to fit the need. For example, they revised:

- “Customer” to “Funding Source.”
- “Contract” to “Household.”
- “Project” to “Household member.”

The team also needed to satisfy internal and funding agency reporting requirements, including the need to print reports on prescribed forms. St. Vincent Catholic Charities used Microsoft Great Plains Report Writer to customize some of the reports that are a component of Microsoft Great Plains. The remaining reports are run using Crystal Reports, which is integrated with Microsoft Great Plains.

The agency runs Microsoft Great Plains on the Microsoft Windows® 2000 Server operating system, with the Microsoft Windows Server™ 2003 Standard Edition operating system supporting the agency’s domain controller and file server. On its workstations, St. Vincent runs Microsoft Windows XP Professional and Microsoft Office Professional Edition 2003. The integration across the set of Microsoft products enhances user experience and keeps IT administration costs low.

Benefits

The recovery and restoration continues in the Gulf States, and in the life of every person affected by Hurricane Katrina. Some evacuees supported by St. Vincent in Lansing have returned home and are living independently again; others have resettled and are also supporting themselves. Approximately 70 hurricane victims continue to receive some services from St. Vincent Catholic Charities. While those people will eventually become self-sufficient again, St. Vincent will continue to provide services through its other programs for approximately 13,000 clients annually. According to Seyka, “With Microsoft Great Plains, St. Vincent can rely on a solid solution that meets the agency’s current and future needs for business management, project accounting, human resources management, and more.”

“We benefited from being able to apply our experience with Project Accounting [I]t’s quite possible that we’ll transfer the experience and time investment ... to programs yet to be developed.”

Andrea Seyka, Chief Financial Officer, St. Vincent Catholic Charities

Figure 2. St. Vincent Catholic Charities serves as a conduit between those able to give and those in need, regardless of their background. (Photo subject is not an actual constituent.)

Flexible, Customizable Project Accounting

The flexibility and ease-of-use of Microsoft Great Plains enabled St. Vincent Catholic Charities to apply an off-the-shelf solution and tailor it to meet the agency’s needs. “We needed to track and report costs by time period, client, household, and funding source. Microsoft Great Plains was a great fit. Once we had set up accounts and clients, even someone without a lot of accounting experience could step in and enter the necessary data,” says Nopareporn.

Speaking from a consultant’s perspective, Matt Mason says, “You can use Microsoft Great Plains and, particularly, Project Accounting, in ways that you wouldn’t expect. Project Accounting is very flexible.”

Simpler Tracking and Compliance

Microsoft Great Plains helps St. Vincent Catholic Charities to track costs, match them easily to funding sources, and comply with internal and external reporting requirements—which often differ from one

funding agency to another.

“Agencies sometimes impose spending limits, for example, a certain amount for housing,” says Seyka. “Microsoft Great Plains helps us ensure that spending is within allowable limits. It also helps us satisfy periodic reporting to agencies and ad-hoc reporting as part of day-to-day case management work. With Microsoft Great Plains, we can pull information very quickly and efficiently.”

Valuable Experience and Partnership

St. Vincent Catholic Charities benefited by enlisting the services of a knowledgeable Microsoft partner. Seyka remarks, “One of the reasons that the software implementation was successful is that MC&E knew the software and understood us, our services and our accounting and reporting requirements. They really helped us identify the affordable software that would meet our unique needs and tailored it cost-effectively.”

MC&E continues to serve St. Vincent Catholic Charities with ongoing user training and additional customization of its Microsoft Great Plains implementation.

St. Vincent Catholic Charities expects to build upon its experience with Microsoft Great Plains and to lower the learning curve for users and IT staff alike. Says Seyka, “We benefited from being able to apply our experience with Project Accounting for Refugee Services to the hurricane evacuee project. Because we serve 13,000 clients a year, it’s quite possible that we’ll transfer the experience and time investment on this solution to other existing clients and programs and to programs yet to be developed.”



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For more information about St. Vincent Catholic Charities, call 517-323-4734 Ext. 1201 or visit the Web site at: www.stvcc.org

Microsoft Dynamics

Microsoft Dynamics is a line of integrated, adaptable business management solutions that enables you and your people to make business decisions with greater confidence. Microsoft Dynamics works like familiar Microsoft software such as Microsoft Office, which means less of a learning curve for your people, so they can get up and running quickly and focus on what's most important. And because it is from Microsoft, it easily works with the systems that your company already has implemented. By automating and streamlining financial, customer relationship, and supply chain processes, Microsoft Dynamics brings together people, processes, and technologies, increasing the productivity and effectiveness of your business, and helping you drive business success.

For more information about Microsoft Dynamics, go to: www.microsoft.com/dynamics

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