

The Conservation Volunteers

The Unit4 Business World ERP solution delivers faster results for TCV, so that it can do even more with its time and resources to help save the environment.

The situation

The Conservation Volunteers (TCV) is the trading name of BTCV (formerly British Trust for Conservation Volunteers), a British charitable organization that works to facilitate environmental conservation through practical tasks undertaken by volunteers. TCV was founded in 1959 and takes a hands-on approach to conservation activities; it has a successful history of environmental conservation volunteering throughout the UK and around the world.

The TCV Group has over 600 staff working from over 100 offices across the UK, a volunteer base of 628,000 people since 1959 and supports over 2,000 local community groups. It works closely with corporate partners, the Government, the Big Lottery Fund, local authorities, government agencies such as Natural England and individual donors.

The need

Prior to selecting Unit4 Business World (formerly Agresso), TCV had two separate systems and was looking to streamline its core financial and business systems. The team required a single system that would improve the accuracy and accessibility of its management information, allow it to produce project analysis and reporting, as well as make efficiency savings.

Moving to a single system would also help improve the infrastructure of the business, enable it to change and to manage the increasing demands of funders. In particular, the charity needed to meet requirements for Full Cost Recovery, an important issue in the UK third sector.

Wendy Ellis (Group Director of Finance and Company Secretary) says flexibility, browser-based functionality and ease of use were also vitally important factors. “We are a very diverse organization,” she says. “The group consists of a charity and a trading company and we operate in a demanding and dynamic sector, where demonstrating added value is crucial to success. Our employees and volunteers therefore require a solution that is easy to use, can be readily configured and changed as informational needs change, and can generate the added-value information necessary to demonstrate and promote the socio-economic impact of our work to our stakeholders.”





In addition, it was crucial to TCV that its solution would enable the finance department to speed up the preparation and distribution of up-to-date accounts. Wendy continues: “We were also looking for a web-based offering that would facilitate secure access to the information the various teams within TCV needed. Our other main task was finding a solution that could cope with our group structure, provide an evidence base for Full Cost Recovery and integrate with our online Management Information System, which is a bespoke package managing all qualitative aspects of every project that we run. Our Management Information System handles everything: from risk assessments, to us knowing that in Yorkshire, for the first six months of our current financial year, we had 8,312 volunteers delivering 14,965 workdays on 174 sites. 12.9% of the volunteers were disabled, 10.3% were under 18, and 25.2% of volunteers were from the 15% most deprived areas in Yorkshire – we needed a system that could link this information to our financial data, and Business World fitted the bill.”

The solution

The Unit4 Business World ERP system was selected by TCV in 2005, to manage its project-based

finances and has transformed the speed at which the organization can prepare its accounts.

In addition to core financials, TCV also uses the Business World Project, HR and Logistics modules – all of which have enabled real-time budget control and freed staff to add value and concentrate on TCV’s core conservation activities.

Wendy goes on to say “Business World has delivered on all levels. We are able to compile, reconcile, produce and distribute final accounts far quicker than before and the finance team is able to concentrate on adding value to operations rather than just spending time number-crunching.”

The benefits

Following its implementation in 2005, TCV has noted many benefits from using Business World.

Ease of use

TCV required a business software solution that is quick to learn and easy to use, because operational staff and volunteers wish to devote their energies primarily to conservation work not financial

management. With Business World, they are able to deliver against these objectives, as they can use a web browser from any office, anywhere in the country, to drill down into their project accounts and performance against budget. This “anytime, anywhere” access to crucial information is enhanced by the flexible, highly configurable architecture of Business World, which means users can design and generate reports quickly and without complex programming skills.

“Web functionality is very important for us, as we have over 100 offices across the UK – all of them with a series of different budget holders. Regional staff managing their budgets in real time is something they had never been able to do before we had Business World, so it really has helped to make our lives much easier and addressed one of our key business requirements,” says Wendy.

Quality and timeliness of the information

Business World has transformed the speed at which TCV can prepare its accounts and makes it much easier for management to access the information needed for important decision-making.

Wendy adds: “Using the old system, operational staff waited up to 2 months to receive their monthly accounts and relied on paper-based transaction listings to drill down into their transactions. Now, any project officer with internet access and a password can interrogate their accounts at any time and management accounts are distributed in less than three weeks. It is very quick, straightforward and streamlined.”

Efficiency

In addition, Business World has delivered significant efficiency savings, both financially and in terms of time. When it comes to time, since implementing Business World, TCV is able to dedicate more resource to adding value and promoting the core work of the charity.

Wendy explains: “It is far quicker to prepare the accounts and to manage the purchase, sales, and grants ledgers. The Finance team has therefore been freed up to concentrate on supporting operational staff and adding value, rather than being pure number crunchers. With Business World, we are not just processing transactions anymore. Instead, we are able to turn the data into meaningful insight and information,



enabling us to build on our successes while also responding to and resolving any issues more quickly; both of which satisfy organizational and stakeholder demands. Business World has really reshaped everything we do.”

Full Cost Recovery

As a charitable organization, which receives funding from government and other public sector bodies, it is vital that TCV is able to clearly identify project costs at all levels, in order to be able evidence and claim maximum funding income. Such transparency is a key system requirement for charities and Wendy explains

how Business World has helped ensure TCV can demonstrate its compliance with this demand: “We have integrated Excel with Business World and built an effective FCR model, which is used throughout TCV. We certainly would not have been able to do this with our old system. FCR is very important to us, as we get funding from so many public sector organizations, including Europe, national government, regional government and local authorities. Nearly all of this funding is project specific. The HR and payroll modules also help here, as there is a seamless upload of information and all accounts are instantly updated.”

Web trading

TCV is also a commercial entity and Business World provides web trading functionality. Wendy comments: “In addition to promoting our conservation work, we use our website to sell complementary goods and services, including conservation holidays, clothing, tools and equipment, bulbs, trees and wildflower seeds.

“Equally, if you are setting up a group within your community to clean up a village green or plant trees, we can provide support, insurance and even help to access funding. All this is handled through our website and ultimately Business World is the solution that processes this data and handles all of our transactions.

“All in all, Business World has delivered and we have a powerful financial and business solution that helps us to adapt to organization changes as well as those in wider world.”



About Unit4

Unit4 is a leading provider of enterprise applications empowering people in service organizations. With annual revenue north of 500M Euro and more than 4000 employees world-wide, Unit4 delivers ERP, industry-focused and best-in-class applications. Thousands of organizations from sectors including professional services, education, public services, not-for-profit, real estate, wholesale, and financial services benefit from Unit4 solutions. Unit4 is in business for people.

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