

Trócaire

UNIT4 has helped Trocaire adapt in a changing world, enabling the international charity to spend more time and money helping the needy and not on administration.

Trócaire is the official overseas development agency of the Catholic Church in Ireland. It operates through a network of field offices in Asia, Central and West Africa, Southern Africa, Eastern Africa and Latin America. Trócaire projects change the lives of people in some of the world's poorest communities and it has made huge steps to put an end to poverty, hunger and injustice and assist in times of emergencies. And it gets results. Some of Trócaire's success in 2010 include: in India, 40,094 families have secured legal title to their own land; in Ethiopia, 33,029 families got access to clean, drinkable water; in Somalia, 211,871 people affected by conflict access healthcare through Trócaire-run hospitals and health centres; in Central America, 246 emergency committees were organised, trained and equipped to protect their communities during disasters; in Sierra Leone, 2,500 women became more independent through 144 savings and loan groups; and in Pakistan, 135,000 people were given lifesaving items after flooding and 20,000 rescued from flooded areas.

Trócaire has been using UNIT4's Agresso Business World solution as its core finance and business system since March 2010.

The situation

Trócaire was set up by Irish Catholic Bishops in 1973 to help alleviate the suffering of the world's poorest and most oppressed people. It takes a partnership approach to its varied projects, working through Catholic networks and with local partners on the ground. Trócaire needs to be able to generate, report on and analyse key financial and business information from its global field offices, as well as from its head offices in Ireland, but by 2009 was finding it difficult as all were using different systems and processes.

Gus McNamara, Finance Manager and Project Manager for Trócaire, commented: "We had around 24 different systems in total which meant that we had no consistency and were spending a lot of time importing and exporting data rather than analysing what our performance meant for our organisation and the projects we focus on. Our reporting processes were inadequate and disjointed and relied heavily on spreadsheets. We recognised that we needed to find a single, powerful but easy to use solution that we could centralise in our Irish HQ and then roll out globally to unite our organisation and provide us with a single version of our data, quickly and easily from any location."

The crucial selection process

With increased demand from stakeholders for transparency and accountability in the Third Sector, Trócaire embarked on a review of suitable market solutions and from over 60 it shortlisted eight for more in-depth evaluation. This list was revised to the three that best met the needs of the organisation. The reviewing panel comprised both finance and non-finance professionals representing all sections of the organisation, which was important to Trócaire as both groups will be using the system to some extent. In fact, 35 finance and 270 non-finance personnel access the Agresso system regularly. Therefore it needed to be both powerful and intuitive, allowing the breadth and depth of complex financial information required by the organisation to be generated quickly and simply and for data to be presented in a format which is easily interpreted.

The benefits

Gus commented: "Following our review, which included Microsoft Dynamics and PS Financials, we selected UNIT4's Agresso solution. The presentation from UNIT4 was superior

and the solution offered us everything we wanted. With Agresso we have the winning combination of rich financial and business management functionality, comprehensive reporting capabilities, quick implementation, ease of use for finance and non-finance people, and the ability to make changes to the system as we need to, even after implementation. Essentially we have a solution that will help us cope with today and tomorrow.”

The roll out

There was a short window in which Gus and his team had to roll out the solution. This was no mean feat given that it not only involved the Irish HQ for Trócaire, but also 27 other offices from Timor Leste to Guatemala. The design phase was started in October 2009 and the UNIT4 team was on hand to assist with training. User acceptance testing followed and the team was able to have their Irish HQ up and running in time for the start of the financial year in March 2010. The next stage was to roll out Agresso across the field offices and Trócaire opted for a phased approach with offices in Asia first, followed by East Africa, Latin America, Central, Southern and West Africa.

Gus continued: “The implementation itself was relatively smooth and user feedback has been positive on the whole. Some of our regional offices have required a little more hand holding but with the help of our own project champions and the UNIT4 team we managed to have every location live on Agresso by the end of June 2010. In fact, the entire project came in on time and even under budget which enabled us to reinvest funds we had allocated to the project into other charitable work. Our first set of management accounts was completed in September 2010 and our first Audit went smoothly, with the system achieving high praise from our external auditors and board audit committee.

“Our teams around the world are impressed by the rapid access they have to their data – it really is as easy as a mouse click. For the first time we have a single version of our financial and business data and we are much more confident about the integrity of that data and our ability to report our numbers accurately and consistently. As finance professionals my team and I can now spend more of our time analysing what our data tells us about our organisational performance and how best to allocate available funds to where needed most. This is something we could not have

done with our previous system and we are impressed with the amount of insight we have into our operations.

“With Agresso we can provide the depth of reporting demanded of us by our stakeholders, showing how and where every penny/cent donated is utilised. The time involved with such detailed reporting has been reduced since we implemented Agresso and without having to increase human resources. In addition, the quality of data and ease of use offered by Agresso means that we can respond more quickly to the ever-changing environment in which we operate, make more informed decisions and work more productively using accurate and organisation-wide data. Such benefits enable us to spend less time number crunching and more on our projects and the lives of the people we aim to help.”

About UNIT4

UNIT4 is a global business software company that creates, delivers and supports adaptable software and services worldwide, to help dynamic organisations manage their business needs effectively. We strive to set the global standard for business solutions that help dynamic organisations to embrace change – simply, quickly and cost effectively.

We have a broad portfolio of solutions that address different markets, requirements, technologies and types of organisation; the UNIT4 group incorporates a number of the world’s leading change-embracing software brands, including the Agresso Business World ERP suite and CODA financial management software. UNIT4 has operations in 17 European countries and 7 countries across North America, Asia Pacific and Africa (as well as sales activities in several other countries) for easy, local access to service and support.

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