

Case Study



New focus on finance at the RSPB

Client: RSPB
Sector: Charity
Project: OpenAccounts

Automation and streamlining of processes using an Advanced Business Solutions financial management solution is enabling financial staff at the RSPB to focus on providing decision support for the business rather than on transaction-related activities.

Founded in 1889 to oppose the trade in wild birds' feathers, the Royal Society for the Protection of Birds (RSPB) has grown into Europe's largest wildlife conservation charity, with more than a million members. With an increasing range of income streams and the need to monitor expenditure for both commercial and charitable activities, including a growing involvement in overseas work its operations have become more complex in recent years. As a result, the role of the finance department has changed, with more emphasis on the provision of financial expertise to the organisation as a whole.

"When we carried out a review of the service provided by the finance department four years ago, we identified two main priorities," explained Tim Pons, Financial Controller. "One was to streamline our financial processes so that people doing data entry could support the business instead. The other was to improve transparency for people in remote locations."



Pons commented:

We wanted an established software product that would meet our strategic needs and also support our special requirements as a charity.

With an extensive network of more than 100 nature reserves covering the whole of the country, including some of its remotest corners, the RSPB has a widely dispersed workforce. Traditionally, this has been associated with relatively slow and cumbersome processes. Purchase orders, for example, would be completed by reserve staff and then mailed to RSPB headquarters for entry onto the financial system, with no easy way for the requestor to establish the status of an order once it had been sent.

Strategic needs

To tackle its priorities, the RSPB decided to implement an integrated financial solution that would support the automation and streamlining of processes while at the same time providing remote web-based access to staff everywhere. Integrated reporting was another important need because of the many internal and external financial reports that the RSPB has to produce. With the existing financial system, data had to be exported before it could be used to produce reports.

"We wanted an established software product that would meet our strategic needs and also support our special requirements as a charity," said Russell Hollinshead, Strategic Business Support Manager. "Also, we were looking for a supplier who was prepared to invest time in building a relationship with an organisation the size of ours."

At the end of an evaluation that encompassed trade shows, product demonstrations and reference site visits, the RSPB chose OpenAccounts. The chosen solution included eBIS Exchange Workflow and OpenReporting as well as core financial management modules. During the implementation, Advanced Business Solutions helped the RSPB team in a variety of areas, including solution design, training, and data transfer using the OpenLink integration module.

To date, much of the RSPB's effort has gone into the automation of purchase ordering using the eBIS Exchange Workflow web application, which enables staff working on the reserves and elsewhere to enter orders directly into the system.

This application has been rolled out to 150 of a projected 250 users and is currently being used to process on average 800 orders each month. In the future, eBIS will be extended to other areas such as expenses, while the development of reporting using the OpenReporting module is another priority area.

Data into the RSPB financial system is routinely imported from a variety of other systems. In the past, this used to involve re-keying of data, but with OpenLink it has all been automated.

Pons commented:

Rather than having just one person in the finance department helping the organisation with decision-making, we now have five. This is a key development.

Long term solution

According to Pons, the core functionality of the Advanced Business Solutions system provides an excellent foundation for financial management across the entire organisation, with software such as eBIS building on this foundation to make financial transactions open and transparent to everyone.

For example, the new system automatically sends an email to the requestor every time something significant happens to a purchase order. Requestors can also query the system directly, and once the RSPB has implemented its proposed new document imaging system, they will be able to see an image of the invoice itself. This is all part of the overall move to give non-financial staff ownership of financial data.

The shift of ownership will greatly reduce the role of the finance department as a mere provider of data while giving other staff a more up-to-date picture of the finances for which they are responsible. Integrated reporting will play a large part in achieving the latter objective. Meanwhile, the automation of processes and the opening up of purchase ordering to staff outside the finance department has already resulted in a shift away from transaction-based activities in accordance with the RSPB finance department's strategic aims.

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The benefits of the new system are also apparent when it comes to project management. In the past, day-to-day financial management of large projects such as the establishment of a new reserve did not make use of the RSPB's core financial system, but this is an area where we believe Advanced Business Solutions can change the way we work.

Another area where the new system is important is grant-aided project work.

"Funding organisations expect to know in great detail how their money has been spent," said Pons. "In the past, the people on the ground couldn't easily provide them with this vitally important information, but now they can."

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Pons commented:

The new system is customisable where it needs to be, but on the other hand it is flexible enough not to require a lot of customisation.

In Wales, for example, an RSPB project that involves working with local farmers and landowners to undertake habitat management for farmland birds is funded by the EU's Objective One programme. According to Pons, this project has benefited from the improved availability of information through Advanced Business Solutions.

There are other benefits too, [claims Hollinshead](#). *"The new system is customisable where it needs to be, but on the other hand it is flexible enough not to require a lot of customisation. Users have reacted very positively because they feel that they are in control of processes now, while the RSPB as a green organisation is pleased to be eliminating much of its finance paperwork."*

For the future, both Hollinshead and Pons anticipate that the RSPB's use of the system will continue to develop and evolve. In fact, a project plan has recently been formulated, identifying several different areas in which the Advanced Business Solutions system will deliver additional benefits over the years to come. *"We see it very much as a long-term solution"* [concluded Pons](#).

About Business Solutions

Advanced Business Solutions, an Advanced Computer Software plc company, provides leading integrated business applications and services that enable public, private and third sector organisations to retain control, improve visibility and gain efficiencies whilst continually improving corporate performance. Its award-winning software systems comprise core financial management, procurement, human resource and payroll systems, integrated with a range of collaborative, document management and business intelligence solutions. It also provides managed and bureau service options.

Advanced Computer Software plc is the UK's leading supplier of software and IT services to the health, care and commercial sectors. It comprises 3 main divisions and has 7000 customers and 800 staff worldwide.

For more information

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