

Customer case studies

Devon Wildlife Trust

Established as a registered charity in 1962, Devon Wildlife Trust is the only organisation concerned with all aspects of wildlife conservation in Devon. It is also a member of The Wildlife Trusts partnership, an influential national network dedicated to the achievement of a UK richer in wildlife.

“We can now implement changes to the budgets every single month - previously this would take over a week to process, but Dimensions takes about half an hour!”

Christine Hawkins
Finance Manager



Industry	Charity
Geographic	Devon
Employees	50+
Solution	Dimensions
Modules	Core ledgers Sales order processing & invoicing Costing/project management

The challenge

Devon Wildlife Trust had been using a TAS Books system running a Btrieve database for 9 years and it was obvious that the company had outgrown its existing system. Its limited capacity led to data overload and subsequently proved unreliable – for example, crashing each time another user was added to the network. It was time to change the system!

Devon Wildlife Trust was realistic about timescale, as with a number of charity and NFP organisations, this wasn't going to happen overnight! This was a large investment, probably one of the biggest the organisation will make, so the Trust needed to be confident in their decision that the chosen software would meet the needs of the organisation and enhance business processes today, and in the future.

An implementation team was appointed, consisting of: Christine Hawkins, Finance Manager, Kate Pitts, Finance Officer and Simon Rutley-Frayne, IT Manager. The team reviewed the present system and embarked on 6 months of information-gathering before they were happy that they had done enough research to make an informed decision. The team then made a presentation to the Honorary Treasurer, Anthony Jackson, who agreed with the proposal to change the system and gave the team the green light.

The selection process

Devon Wildlife Trust considered a number of solutions and compiled a shortlist. Hansa and Sun were immediately removed because they proved too expensive. Sage MMS and Exchequer, were then ruled out as neither provided the level of functionality required by the Trust.

Two remained on the shortlist; Access Dimensions and Kypera. After a demonstration of both solutions, the Team decided that Kypera was visually unappealing and much preferred Access Dimensions' look and feel'. The Team was also very impressed by the solution, demonstrated by the Access consultants.

Experts in the sector

Access has a proven track record of implementations in charity and not-for-profit organisations. This heavily influenced the Trust's decision as it gave them the confidence that they were dealing with a provider that understands the demands and challenges of the sector. The consultants were also able to provide a highly relevant reference site in the form of Sussex Wildlife Trust. In fact, their 'glowing report' provided the deal-clincher for Finance Manager Christine Hawkins. "Hearing the business benefits first-hand from an organisation so similar to ours was all we needed to reconfirm Access's expertise in the NFP sector" she says.

The implementation

To gain maximum benefit from the investment, the software needed to be configured to Devon Wildlife Trust's own business environment and unique ways of working. As part of the consultancy service, the Access consultants carefully analysed Devon Wildlife Trust's existing business activities, using this information to shape the new solution until it provided the best fit possible.

Devon Wildlife Trust and the dedicated Access consultant worked together to form an implementation plan to ensure that the functionality required was delivered on-time and to budget. Simon Rutley-Frayne, IT Manager, had already made the decision to change the Trust's IT infrastructure to SQL, as he wanted a more robust system with more processing server-side which would in turn massively increase data speed. So the Access Dimensions solution, which is based on Microsoft's industry-standard SQL Server 2005 database, fitted the Trust's new structure perfectly.

A go-live date was set of 30th April to coincide with the new financial year. The implementation took 6 months, from demonstration to go-live date, and the Specialist Centre implemented the system on-time and within budget.

The solution

Devon Wildlife Trust had a number of business issues that they wanted the new solution to address and Christine and her finance team began to feel the benefit of the solution almost immediately after implementation.

Keeping track of a huge number of different projects was a major issue, and ensuring that each had cost centres for funds, income and expenditure, was essential to see exactly what each project had generated for the Trust. Christine Hawkins commented, "There is absolutely no limit to the number of projects that can be set up and Access Dimensions gives us the ability to fully analyse each individual project in such detail. Now we can see actual costs and income for each project. This accurate information was not available to us before".

The Trust needed a flexible nominal structure, so they could report income as New, Secure and Predictable, to enable the Trustees to change the way they require reports to be produced. This could not be achieved with TAS Books, however, Access Dimensions easily achieved this by using a category to flag an Account. This dictates how the Account is reported to the Trustees and can be easily changed without affecting management information.

The benefits

The Access consultants wrote six new reports in Crystal Reports specifically for the Trust so they could arrange the data in the format needed to ensure and present the information exactly as required. "The quality of report-writing provided was phenomenal and all of thereports that were written specifically for us were absolutely first class", commented Christine.

Christine also attended a two-day Crystal Reports training course so she could amend existing reports, if requirements changed. Christine added "Being able to 'tweak' reports in-house has been of major benefit."

Access Dimensions' powerful reporting provides full transparency across the entire organisation, and Trust employees can now run any report they may need. This takes the pressure off the finance department, who were previously responsible for running all the reports required by employees of the Trust.

The Trust needed to implement Excel spreadsheets containing information, such as budget and timesheets, into the finance system, so they didn't have to re-key the information twice. The re-keying of information from the TAS Books system into Excel, and vice versa, was a major issue, it was time-consuming and the data was prone to errors. Access Dimensions eliminated the need for re-keying and data can now be imported or exported quickly and efficiently.

As a charity, funding is prone to change throughout the year. Devon Wildlife Trust needed the ability to revise budgets; the TAS Books system could achieve this but it was very time-consuming. Access Dimensions supports flexible budgeting quickly and accurately. Christine commented, "We can now implement changes to the budgets every single month. Previously this would take over a week to process, but Dimensions takes about half an hour!"

Exploring the possibilities

Christine commented "When we chose Access Dimensions we knew that we were implementing a solution that would grow with us. I am fully aware that we are presently only using a fraction of the functionality that is available. Over time, we intend to fully embrace all the features that the solution can offer and add modules as our organisation grows and additional functionality is required".

Further information

For further information on this, or any other Access case studies, please telephone us on 01206 322575, email case-studies@theaccessgroup.com or, alternatively, visit www.theaccessgroup.com/downloads/case-studies.aspx