

Agile and insightful charitable project funding



The National Trust



An adaptive and intuitive Unit4 Enterprise Resource Planning (ERP) strategy is helping Europe’s largest conservation charity manage its finances more accurately and easily – and cope with the funding shortfall created by the Covid-19 pandemic.

A single, unified view of finance, procurement, and projects is automating processes and building a blueprint for growth at the National Trust.

Key benefits include:

- Reduced project funding drawdown reporting from annually to monthly, improving project outcomes
- Created simple, intuitive ERP system that is engaging and popular with users
- Helped the trust determine where to prioritize future investment, following pandemic-led funding shortfall

Europe’s largest conservation charity

With 5.6 million members, 65,000 volunteers, and 13,000 staff, the National Trust is the largest conservation charity in Europe, caring for more than 250,000 hectares of farmland, 780 miles of coastline, and 500 historic properties, gardens, and nature reserves.

The nonprofit trust has a complex funding structure, with income derived from multiple sources, including subscriptions, donations, investments, property entrance fees, and commercial services. Likewise, expenditure varies from everyday operational costs, to commissioning repairs on stately homes in Suffolk, to dry-stone walls in the Peak District.

The existing ERP platform, however, was a barrier to efficient management of the organization’s finances: multiple overlapping manual processes persisted, it was difficult to extract data for decision making, and change was slow.

“We had made significant investment in our HR and payroll systems, but finance was lagging in terms of capability,” says Robert Wood, Finance Manager. “Unit4 offered a fresh, holistic approach to finance transformation. They understood our charitable objectives and have proven experience in helping nonprofit organizations

Industry

Nonprofit

Location

Swindon, UK

Size

5.6 million members and 13,000 staff

Product

Unit4 Enterprise Resource Planning (ERP)

Challenges

Existing ERP platform was a barrier to efficient finance management: overlapping manual processes persisted, it was difficult to extract data for decision making, and change was slow

Key metrics



Funding drawdown analysis every month, rather than once a year



Put people at the center of decisions

“Unit4 is vital in determining where we prioritize investment in the aftermath of the pandemic. It gives our executives the facts at their fingertips to revise spending plans, change the way we operate, and prepare for the future.”

Robert Wood

Finance Manager, the National Trust

like the National Trust deliver finance transformation and turn the function into a business partner. The Unit4 ERP platform itself is flexible, intuitive, and works straight out of the box.”

The trust has implemented a connected Unit4 ERP platform, spanning finance, procurement, and asset management. By breaking free from fragmented legacy systems, the trust has created a single, shared view of financial, purchasing, and other data, enabling faster, more informed decision-making and greater agility. Unit4 also automates many of the hitherto manual finance and procurement processes, using automated workflow to speed transactions and decision-making while increasing visibility and control across the organization.

Accurate, insightful project funding

Project funding and management provides a snapshot of the difference Unit4 is making. Many of the conservation projects the trust works on are subject to restricted funding, whereby a project can only be funded using the money intended for that particular conservation, be it the upkeep on a cherished property or landscape maintenance. In the past, it was difficult to see a snapshot in time of the restricted funding budget for a project, such as how much had been spent, on what, and the balance remaining.

Now, with Unit4, the trust has a shared, 360-degree view of every fund. Project stakeholders can use the simple,

intuitive interface to drill down into the project funding to determine budget status. They can issue purchase orders to suppliers, with workflow taking care of authorizations and engagement with the suppliers. ‘Gates’ have also been added, alerting the teams to when budget thresholds are about to be reached. Robert and his team have also introduced a ‘funds ledger,’ which shows instances where a variety of different funds are available for use on a particular project.

“We have recently undertaken a significant amount of conservation work on the land above the White Cliffs of Dover,” says Robert. “Unit4 enables the local team there to manage the conservation work, including engagement with all the local agricultural, building, and other contractors, all of which amounts to a large number of small invoices. The team can approve the invoices, pull down reports, and drill down into a fantastic amount of granular detail, to ensure the budget stays on track. Senior managers at our headquarters, meanwhile, share that same view of that finance and purchasing data, so everyone is looking at a single source of the truth.”

For Robert, the intuitive interface, process automation, pre-built functionality, and self-service reporting all add up to a powerful productivity tool. “We can see the project information immediately. In the past, we analyzed the drawdown on project funds annually; now we do it every month. That frequent reporting ensures we stay within our spending parameters and deliver on our conservation remit.”

Transformation is also happening with expenses management. In the past, staff used to submit their expenses manually, including an envelope of hard copy receipts – all of which was processed, approved, and paid manually. Now, using Unit4 workflow automation, that process is streamlined and faster, freeing resources for other tasks. National Trust Rangers working remotely, for example, can submit their expenses in the field without recourse to paper copies.

Building for a post-pandemic future

This complete intelligent approach to finance management has played a vital role in supporting the trust as it copes with the aftermath of the Covid-19 pandemic. When the country went into lockdown, all of the trust’s facilities – from houses, gardens, and car parks, to shops, cafes, and events – were brought to a standstill, resulting in tens of millions of pounds of lost support.

“The virus has impacted almost every aspect of our income, and we needed to act quickly, making dramatic savings to ensure we are sustainable in the future,” says Robert. “Unit4 is vital in determining where we prioritize investment in the aftermath of the pandemic. It gives our executives the facts at their fingertips to revise spending plans, change the way we operate, and prepare for the future.”