

Not-for-profit specialist systems, IRIS Exchequer and IRIS CARE, work together to help Action for Kids increase effectiveness

Action for Kids Charitable Trust is a national charity that works with disabled children and young people, their parents and carers to help transform these young lives by removing barriers to independence.

The charity was set up in response to the unique problems facing severely disabled children and their families and in recognition of the disparity between numbers of such children and the availability of suitable aid and support.

This is achieved through a programme of services that includes:

- Helpline and family support services
- Mobility and other equipment provision
- Work related learning programme

The charity has been using the not-for-profit version of the award-winning financial management system, IRIS Exchequer since November 2000 and in 2006, a new organisation wide database solution, IRIS CARE, was installed to improve information and effectiveness across all areas. The implementation of IRIS CARE represented the biggest investment in a single project by Action for Kids in its history.

Action for Kids and IRIS Exchequer

Action for Kids installed the IRIS Exchequer financial management system in 2000 at a time when it was significantly expanding its fundraising activity and needed a fully featured accounting package. Within the organisation, the number of departments was increasing and it was becoming increasingly important to ensure costs were correctly allocated.

Paul Townley joined the charity in 2004 and inherited the IRIS Exchequer system. He said,

“Although, I wasn’t responsible for the implementation of the IRIS Exchequer system, I could see straight away that it very easily generated the information we need on a day-to-day basis and it continues to do so.”

The organisation relies on IRIS Exchequer to extract business information swiftly and with a minimum of fuss. Paul cites the tight links with Microsoft Excel as a particularly strong feature which are used to produce management reports and statutory reports such as SOFA (statement of financial activities) with minimal administrative overhead.

The links between the system and Microsoft Excel have allowed them to reduce the time taken to produce management accounts, significantly.

The IRIS Exchequer system is used by 2 finance staff on a daily basis that produces the core information for the management accounts. Very much at home with the workings of IRIS Exchequer, if Paul has a query, he finds that he can very quickly check the information himself through his own direct access of the system.

The charity openly admits that the quality and timeliness of the information now available to them has transformed their understanding of their cost base and they are now able to fully monitor the performance of each department.

Paul concluded by praising the support services of the IRIS Exchequer team, “We are a long term user of IRIS Exchequer and have always found their support services to be of the highest quality. The IRIS Exchequer system suits our requirements and provides the essential information our senior management team requires to monitor our projected growth.”

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Action For Kids
Creating independence - Providing opportunities - Offering support



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Action for Kids and IRIS CARE

The IRIS CARE system was installed in 2006 with the aim of improving information and effectiveness through the enhanced use of a new organisation wide database. The investment in a modern, user-friendly CRM database was considered an essential part of streamlining information flow within the organisation to help enable it to achieve its strategic objectives.

Prior to the implementation of IRIS CARE, the 3 departments of fundraising, family support services (including mobility equipment) and work related learning all operated their own very different methods of storing information using a combination of databases, spreadsheets and manual processes. Paul Townley, Finance Director, calculates that there were approximately 30 separate sources of data at this time which can only be described as a 'logistical nightmare'. In the work related learning department where youngsters visit the charity's headquarters, day in and day out, the only way of recording the numbers and the hours spent on individual courses was for administrative staff to input into a spreadsheet. Whilst this worked, the charity needed more flexibility of reporting. This has, and continues to be addressed, although it is one of the most challenging areas of the implementation.

Without a central repository for data, the charity was finding it extremely difficult to track a contact's history or to assess whether separate departments may be dealing with a common contact. The problem was compounded by the fact that one of the incumbent database systems was rather 'long in the tooth' and finding someone with the skills to maintain was becoming increasingly difficult.

Several systems were considered, but IRIS CARE was ultimately selected because of the organisation's expertise and long experience of the not-for-profit sector and most importantly, because of their ability to provide a system that covered all the required areas in a comprehensive manner. Paul commented, "The team demonstrated a willingness to undertake configuration to meet our specific requirements and we were confident that they would deliver on a wide variety of operations in what were, effectively, 3 separate implementations."

The experienced IRIS CARE team worked to ensure that the implementation was completed to the charity's satisfaction and the system has now been in use for a full financial year.

One area where IRIS CARE has made a significant impact is in the organisation, recording and reporting of the monthly raffle, according to Paul.

Income from the raffle has increased significantly recently. Paul said, "The new IRIS CARE system is helping us to streamline all the associated administration saving valuable time. When tickets are distributed they are recorded as 'provisional' transactions on the system and are 'confirmed' when money is received. The system automatically generates letters with the appropriate ticket numbers to accompany their despatch."

"Receipts are 'batched' up and a summary document for the batch number is issued which can then be input into the IRIS Exchequer financial management system where it is posted in total."

Having undertaken a full database cleansing exercise in 2007, Paul is highly confident in the integrity of the database and its accuracy; a factor that is essential to the success of its external fundraising campaigns.

Paul concluded by saying, "Many medium sized charities, such as Action for Kids, find their resources constantly over-stretched and it was important that we were able to implement a system that could be used by staff with differing levels of IT literacy, although training and becoming proficient on the system does require significant investment of time. The foundations are now in place and the system is being used fully to assist the recording, monitoring and measuring of our activities. We are now looking forward to being able to extract the valuable information the system holds as we move forward."

To see how other organisations are benefiting from implementing IRIS Exchequer please visit www.iris.co.uk/exchequercasestudies

For more information regarding IRIS CARE please visit www.iris.co.uk/care

Solutions that deliver



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