

Customer success story
TEAR Fund

Industry 
Not for Profit

Location
New Zealand

Greentree product suite
Financials
Job Costing
CRM

TEAR FUND SPEEDS UP THE ALLOCATION OF FUNDING

BUSINESS BENEFITS

- Greentree was chosen because of its project management capability and customisability at the most cost effective price.
- The use of Tree Categories allows donations to be coded and matched against projects with the same code resource requirements. This ensures every donation is targeted towards projects accurately and effectively.
- Accounts Receivable customisation enables automatic import of large volumes of transactions into the financial system with donor acknowledgements being automatically generated. This has significantly reduced the amount of time this process now takes and eliminated the need to employ additional staff.

Donations to this not-for-profit are making a difference faster than they ever have before.

Business Situation

TEAR Fund New Zealand had been struggling with inefficient systems and multiple databases. Jon Horne, Chief Financial & Operations Officer, explains that keeping track of and applying donor funds to projects had become time-consuming and inefficient. He says, "This was largely due to the increasingly fragmented state of organisational data held in departmental silos."

The organisation receives large volumes of small-value donations from hundreds of donors every day into its local bank account. These must be imported into a

financial management system and matched with donors so tax receipts can be issued at year-end. Although a not-for-profit, TEAR Fund operates as a project-based organisation with a need for flexible, large volume financial transaction management and sophisticated Job Costing and project management capability.

The Challenge

The overall goal was to streamline the tracking and management of the relationships between funding, donors, projects and sponsorship. Systems and organisational data needed to be rationalised into one fully integrated single source system. The financial system needed to be fully integrated with Job Costing to ensure funds were accurately allocated to projects.



"We're excited about the progress we've made since Greentree was implemented. Going forward we're even more excited about the potential CRM offers, particularly when it comes to helping us better manage our donor/sponsored child communications from one central location."

Jon Horne, Chief Financial & Operations Officer,
TEAR Fund



TEAR Fund partners with local Christian organisations and churches in developing countries. Their partners use local staff who work directly with the poorest people, helping them find their own solutions, cutting out the middle man and reducing costs. TEAR Fund's key activities are child sponsorship, Microenterprise, community development projects and disaster relief. www.tearfund.org.nz

The Solution

"We chose Greentree because its cascading Tree structure within the Job Costing module set it apart from the other systems. Greentree offered greater project management control and high visibility of work-in-progress."

Aside from Job Costing, Jon states that of the systems evaluated, "Only Greentree presented an entirely customisable system, which meant we could modify the financial component to meet our not-for-profit requirements. Plus, we could do this without the Tier 1 system price tag."

KEY RESULTS

Improved allocation of funds and processes through Tree Categories

TEAR Fund is part of a network of not-for-profit organisations which operate as a global partnership. Whilst the funds allocated to projects originate from NZ, the project will actually be undertaken by one of TEAR Fund's overseas partners. Jon says this is their point of difference to other not-for-profit organisations, which might send a team from New Zealand to a region to undertake a project. Sending a team increases the costs of implementing a project, whereas TEAR Fund leverages the expertise and resources of partners already on the ground in areas of most need. With 200 projects and 12,000 children sponsored, Job Costing is a core business activity.

Jon explains how Greentree is making a difference here. "We cost jobs using Tree Categories so for example,

if a donor wants to make a \$50 donation to a water treatment project in Africa, we can accurately allocate that \$50 to a project with a water treatment component. The next step in this process will be implementing CRM so we can improve the management of communications between donors and sponsors. Greentree has made Job Costing so much more accurate, quicker and easier to manage, and ensures donations go exactly where the donor intended."

Process improvements streamline successful Haiti Appeal

Jon is certain that if TEAR Fund was still using the old system, they would have needed to employ a large number of extra staff just to cope with the volume of donations. The process of receipting and acknowledging donations was a convoluted series of time-consuming processes. Individual payments needed to be matched with a donor payment before an acknowledgement could be sent. High administration costs don't bode well for attracting donor funding, so organisational efficiency is imperative.

In a not-for-profit model, there is no obligation for donors to pay, thus there is no need to generate invoices. However, donations still need to be imported into a financial system and accounted for. An Accounts Receivable customisation enabled large volumes of transactions to be imported, while Greentree automatically produced acknowledgements to donors - the recent Haiti Appeal is an example of this in action. Jon summed up the success of this campaign when he said, "Greentree has made processing donations faster than ever before."

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TEAR FUND PRIMED FOR BUSINESS