

LAKE

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Royal Masonic Benevolent Institution

The RMBI is a registered charity which established its first Home in 1850 and now provides a comprehensive range of services to older Freemasons and their dependants. This includes Care Homes and Sheltered Accommodation and practical support to those who wish to remain in their own homes.

The RMBI is a major UK charity, employing over 1500 full and part-time staff and supporting more than 4000 beneficiaries: 1150 residents in 18 homes and a further 3000 people living in the community.

Christopher Head is Executive Director of Finance based at the head office located in London.

Key Concerns

When Christopher Head joined RMBI, he inherited responsibility for a recently implemented finance system based on a combination of software that included a specialist billing and sales ledger system and Pegasus Opera.

Over the next couple of years, the Finance team worked hard to make best use of the system they had inherited. However, by in time it became clear that a fundamental review of systems was required. The principal concerns were, as follows:

- Firstly, there was no visibility of financial transactions. Users were unable to drill down from summary figures held in Pegasus through to transactional data held in the billing system.
- Secondly, the billing system could no longer meet the challenging requirements for flexible billing of multiple parties across multiple periods.
- Thirdly, Pegasus Opera lacked the flexibility in reporting and analysis that an organisation such as RMBI needs.

Christopher Head, comments:

"There was no visibility across transactions. Every month I had great problems as a management accountant trying to work out what the figures should be..."

...Time after time we kept finding things that our billing system couldn't do..."

...Reporting on Pegasus was limited. The Trustees of the charity were looking for more and more complex analysis of the data and Pegasus just wasn't able to provide it."

A comprehensive review of needs highlighted four areas for improvement.

Christopher Head explains:

"My diagnosis was that we had four separate issues: the first one was with the software for Residents' Fees Billing; the second one was for accounting software; the third one was Payroll and online filing; and, fourthly, we needed a time and attendance system because most of our employees were hourly paid and we needed a recording system out in the Care Homes to feed into the payroll system which then in turn fed across into the accounting system."



Selecting the Right Solution for Care and Not-for-Profit

In common with many Care providers, RMBI has specialist billing requirements reflecting the complexity of their fee structure. The following is a flavour of those requirements:

- Flexible billing rates including monthly, weekly, and daily
- Flexible billing periods, starting at any point during the month
- Multiple “bill-to” parties per resident, with variable billing rules per party
- Calculation and monitoring of charitable subsidy by resident and home

RMBI started out expecting they would need a specialist system for Residents Fee Billing to integrate with a run-of-the-mill accounting system. In the end, that assumption was proved incorrect. Of all the systems they looked at, SunSystems from LAKE was the only one that provided them with complete confidence that here was a fully integrated solution they could trust.

“We looked at a number of specialist Care systems and they all had significant weaknesses...

...LAKE came to us and proved they could do what we asked. They gave us the confidence that SunSystems could handle our Billing requirements and, added to that, SunSystems has a great reputation as an accounting package.”

Another reason for selecting SunSystems was that RMBI required a scaleable system that can accommodate the needs of additional charities on a single instance of the software.

Following a successful implementation at RMBI, The Royal Masonic Trust for Girls and Boys are now working with LAKE to migrate on to SunSystems.

Eventually, two other major charities will be invited to migrate to SunSystems, so that the likely long-term outcome will be that four major charities will be hosting their accounts on one SunSystems platform and server, leading to significant administrative savings.

The LAKE SunSystems Solution

The LAKE SunSystems solution went live following a rapid implementation and data migration project. The success of the project is testament to the hard work put in by all parties.

“You can’t just impose something on a group of 16 / 17 people. I needed the team to be involved right from the beginning. In the end this has contributed to a successful project. Everyone has a stake in making the new system work for us...”

...With SunSystems, I now have total visibility over the data going in and the information coming out, and total visibility over the process. That gives me a lot more confidence...

...The fact that it’s an integrated system and is live and balanced every day is of great help.”

LAKE

LAKE Service

Selecting a new system is as much about choosing the most appropriate solution partner as it is about selecting software. LAKE is a specialist supplier of SunSystems solutions to the Care and Not-for-Profit sectors and leverages that experience to the benefit of its clients.

The following are some of Christopher Head's comments regarding the service RMBI have received from LAKE:

"I have run 4 or 5 major projects for other organisations over the last 10 years and this one went as well as any project could. It was on time, on budget, and it achieved what we wanted it to..."

... this has largely been due to the LAKE consultant who, I have to say, is an outstanding project liaison person. He's very knowledgeable and I was very impressed with his skill set and the support he has given us since going live."

Contact

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