

Customer success story
TEAR Fund

Industry 
Not for Profit

Location
New Zealand

Greentree product suite
Financials
Job Costing
CRM

Greentree business partner
Verde Group

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.

Since Greentree Business Partner Verde Group made sense of a fragmented data environment, this not-for-profit's donations have been making a difference faster than they ever have before.

Business Situation

TEAR Fund New Zealand had been struggling with an inefficient mishmash of disparate 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."



"With the help of Greentree Business Partner Verde Group, we've achieved some significant milestones - we've come along way from where we started. Verdé's knowledge of Greentree has been invaluable and we're excited about continuing our journey towards achieving even greater things in the future."

Jon Horne, Chief Financial & Operations Officer,
TEAR Fund

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.

Why Greentree?

Jon recalls, "it was Greentree's cascading tree structure within the job costing module that really set it apart from the other systems we looked at. Greentree offered much 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 as entirely customisable, which meant we could modify the financial component part of it in order to meet our not-for-profit requirements. Plus, we could do this without the Tier 1 system price tag."

The Challenge

Jon's overall goal was to streamline the tracking and management of the relationships between funding, donors, projects and sponsorship. As a first step, all disparate systems and organisational data needed to be rationalised into one fully integrated single source system. Specifically, the financial system needed to be fully integrated with job costing to ensure funds were accurately allocated to projects.

KEY ROI RESULTS

Tree categories optimise allocation of funds to projects

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 using on-the-ground resources. 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. Utilising coded categories to cost jobs has proved to be a much more accurate, quicker and easier way to ensure donations go exactly where the donor intended."

Seamless interface with Global Child Sponsorship system

Matching sponsors with children needing sponsorship required TEAR Fund to develop a link to the Global Child Sponsorship system, which was essential to ensure there were no double-ups i.e. 2 sponsors to a child or vice versa. Despite having no direct control over the global system, Jon is delighted Verde were able to create a seamless interface without any disruption to the global system.

Process improvements streamline successful Haiti Appeal

Jon's 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. From a strategic perspective, 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. Verde customised Accounts Receivable to enable large volumes of transactions to be imported into Greentree so donor acknowledgements could be automatically generated - the recent Haiti Appeal is an example of this in action.



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, micro-enterprise, community development projects and disaster relief. www.tearfund.org.nz

verde

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TEAR FUND PRIMED FOR BUSINESS

