The National Autistic Society

"The changes have resulted in a much better budget, giving us far greater accuracy and visibility. One of the budget holders told me that two hours after they had submitted the budget, the Finance Director was on the phone discussing it with them. This level of responsiveness and interactivity would have been impossible previously, and has made a huge difference in the buy-in to the budgets and the sense of ownership."

Andrew Turnbull, Financial Controller for NAS

The National Autistic Society (NAS) exists to champion the rights and interests of all people with autism and to ensure that they and their families receive quality services appropriate to their needs. The organisation works in many areas to help people with autism live their lives with as much independence as possible. By implementing IBM Cognos solutions, "we have significantly improved the planning and budgeting process, which gives us greater accuracy and visibility," says Andrew Turnbull, Financial Controller for NAS.

Challenges faced

The NAS has a staff of around 2,500, and runs 6 specialist schools and 17 clusters of residential homes and support services for adults with autism, which account for 85 percent of the organisation's expenditure. Funding for these services generally comes from local authorities, and fundraising and a wide range of other activities accounts for the remaining 15 percent of the £65 million turnover.

Diversity of activity, a geographically split workforce, charity compliance, and a requirement for flexible short- and long-term planning resulted in a complex planning landscape for which spreadsheets were unsuited.

The user base at the NAS ranged from Spreadsheets power users to those who found filling in templates a difficult process which distracted them from their primary caring or service-delivery role. This led to a compromise in terms of the level of detail that finance could expect from the users.

Using Spreadsheets did not offer any reliable audit trail facility or version control. Turnbull says, "We had a bottom-up system, which was great until our users got the numbers back and found that they sometimes bore little resemblance to those they had entered. This was because other people had tinkered with them along the way and there was no reliable mechanism to record the changes and the rationale behind each amendment."

Industry: Charity

Geography: UK

Information needs:
• Planning and reporting

Solution:
• IBM Cognos 8 Planning

Benefits:
• **Accuracy** – achieved 'one version of the truth' across organisation reporting
• **Flexibility** – the budget model can be quickly and easily adapted to support both evolving and new projects
• **Efficient planning** – supports faster employee cost planning for 2,500 staff across six specialist schools and seventeen care homes
• **Transparency** – ensures resources can be allocated effectively across the organisation in a clear and consistent way, which supports bids for public funding
• **Autonomy** – delivers self-service reporting, taking the onus away from the Finance department
• **Fast implementation** – working with Inca, the migration to IBM Cognos took only two days

From a finance perspective, spreadsheets were too inflexible when it came to reacting to change. For example, if a user wanted to add in a new account code to represent a change in the business, it would have to be added into about 50 separate templates. "It was impractical for us to use Spreadsheets to profile budgets over the 12 months of the year at the same time as putting together the initial budget. This was done as a separate exercise, which often resulted in changes to the original budget as people thought through their planning in more detail—which was inefficient for all concerned," says Turnbull.

However, when it came to central control, Spreadsheets became far too flexible with the model often returned by users changed, either on purpose to represent something going on at a local level, or more likely by accident. This lack of control made consolidation a time-consuming task and often required repeated dialogue with users.

Turnbull continues, "Despite all of our efforts with Spreadsheets we always had the sinking feeling that they weren't really telling us the full story and we were less than 100 percent confident in the numbers. We could not drill down into the figures, and the process was inflexible for the users, making them very dependent on the finance department for clarification."

Strategy followed

At the end of 2004, the NAS finance team started looking at alternative planning systems to using Spreadsheets. Due to the complexity of the organisation, the low-end solutions were considered too basic.

There were three key planning and business intelligence (BI) challenges for the NAS:

1. Flexibility to plan fee income for every individual supported—essentially 800 separate care or education plans, each with different fee levels.

2. Detailed staff planning for a staff of 2,500, and a need to track remuneration levels driven by several factors such as training and skill levels, regions, grade, and contract.

3. The need to allocate support costs accurately across the organisation on a clear and consistent basis. When the NAS is bidding for funding, it must often deliver complete transparency into what portion of the funding will be spent upon support costs, such as HR and IT costs.

NAS discovered the functionality it needed, with the right levels of flexibility, Web reporting, and data entry through Inca Software, in a solution from IBM Cognos.

IBM® Cognos® Planning and IBM® Cognos® ReportNet were initially chosen as the most suitable products to deal with NAS's three main issues, and by March 2005, Inca had helped the NAS build the framework of the model within the timetable for delivery. "Once the software was implemented," Turnbull states, "the changes resulted in a much better budget, giving us far greater accuracy and visibility. One of the budget holders told me that two hours after they had submitted the budget, the Finance Director was on the phone

discussing it with them. This level of responsiveness and interactivity would have been impossible previously, and has made a huge difference in the buy-in to the budgets and the sense of ownership."

IBM Cognos ReportNet helped the NAS to simplify the monthly reporting process such as payroll data, and to release the finance team from report production. In view of this success, the NAS decided to migrate to IBM® Cognos® 8 Planning in the summer of 2006.

The migration process took only two days, with the system's upgrade wizard and an Inca Consultant. "The migration of existing reports was straightforward," says Turnbull. Because of the ease of transfer, the NAS was able to start using the system straight away, and there was little difference in the end-user interface, mitigating the need for additional training.

Benefits realised

"Writing new reports in IBM Cognos has been simplified by the introduction of new drill-down facilities," says Turnbull. With IBM Cognos 8 Planning, Turnbull can drill through P&L and balance-sheet reports to nominal group totals, nominal level, then transaction level.

NAS is expanding its use of IBM Cognos all the time. "More departments and different applications are being reported through IBM Cognos, and this is likely to continue," says Turnbull.

"The whole project has been a challenge, but we have made huge strides forward and are very pleased with our achievements. We are looking ahead for ways to increase efficiency and allow us to deliver an even better service to individuals with autism and their families," says Turnbull.

Because of the successful nature of the migration to IBM Cognos 8 Planning, NAS plans shortly to upgrade all its IBM Cognos planning and BI products to the latest version to ensure that the organisation continues to get the most out of its software.

About Cognos, an IBM company

Cognos, an IBM company, is the world leader in business intelligence and performance management solutions. It provides world-class enterprise planning and BI software and services to help companies plan, understand and manage financial and operational performance. Cognos was acquired by IBM in January 2008*. For more information, visit **http://www.ibm.com/software/data/** and **http://www.cognos.com**.

As a result of the acquisition, product names have now changed to reference IBM at the beginning of the software or service.

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