

## Case study

# Active Learning Trust



Active Learning Trust is a values-led multi-academy trust with 21 schools in Cambridgeshire, Suffolk and Norfolk, with 8,500 children and 1,600 staff. A central team provides expert support so schools can focus on teaching and learning.

## The challenge



### Move on from a slow and clunky system that couldn't provide good reporting

The finance team at Active Learning Trust (ALT) was struggling with a slow, old-fashioned system that wasn't delivering the quality data the leadership needed. "It was too hard to get things right, too easy to get things wrong and things took a lot longer to do than we'd like," says Phil Beecher, the trust's CFO. "The system wasn't delivering the value we needed and it couldn't keep pace with the rapidly evolving environment we're in."

The 21-school trust didn't have a single purchase ledger, while add-ons were needed for a host of basic tasks including reporting and remittances. Nineteen payment runs had to be done laboriously once a fortnight. When it came to adding new academies to the system, the team would have to ask the software vendor to do it, which meant extra upheaval, time and money.

The quality of reporting from the system wasn't adequate to deliver real insight – and there was no simple way for budget holders to see how they were doing against budget as the year unfolded and circumstances changed. "It was like running blind," says Louise Creed, Headteacher of Albert Pye and Ravensmere Schools Federation. "I might know my forecast at the beginning of the year but in the middle of the year, I wouldn't know as well as I'd like to how much was left in the pot."

"The system wasn't giving us what we needed any more," adds Nicki Mayne, Assistant Director of Finance. "It was slow, it was clunky. We didn't have the evidence there for audit and we didn't have the appropriate workflows in place. It was a system that wasn't fit for purpose any more."

**Previous system:** IRIS Financials (PSF)



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**Phil Beecher,**  
CFO, Active Learning Trust





# The solution



## Big time savings from a faster, more efficient system

The need to adopt the Department for Education's new chart of accounts spurred the change in systems. ALT asked other multi-academy trusts what finance software they were using – but it also looked at newer entrants to the market. "Otherwise, the danger is that you're buying the system that was good five years ago and not the system that's going to be good now," says Phil Beecher.

A working group looked at four systems and invited three vendors to give demonstrations. "We chose iplicit because it was a dynamic system, it was intuitive and it gave us everything we needed in one place," says Nicki. "It isn't difficult to use and we could tailor the system the way we wanted it."

iplicit also came out best for cost. "With a lot of the organisations we looked at, to get the same functionality, we didn't just have to buy the system but all the bolt-ons as well," adds Nicki. "There's a big difference between what it initially looks like you'll pay versus what you actually have to pay to get the same level of functionality as iplicit."

Phil says the relationship was also an important factor. "It was going to be a value-added relationship, not just a transactional one," he adds.

Implementation was a "far richer and more in-depth" process than the team expected, designed to configure the system to the trust's needs. "We had about three months of training, support and designing the system the way we wanted it," says Phil. Support since then has seen "near real-time responsiveness" he says.

### The team has recorded many benefits:

#### 1. Speed and reliability.

People no longer struggle with laggy software – or find they can't log on because too many users are already in the system.

#### 2. Huge time savings.

Accounts payable automation has been an "absolute game changer", says Nicki. The system reads invoices and matches them with supplier records, requiring staff to spend "very little time" on the process. The system also automates complex processes like prepayments and deferred income. "That's halved some of the work at year-end," says Phil.

#### 3. Custom workflows and visible audit trail.

Workflows were designed to suit the trust, so anything submitted for approval without the right attachments is rejected. Documents are stored alongside the transaction in the system – and it's easy to drill down into any ledger entry for an audit trail.

#### 4. Consolidated payment runs and remittances.

The trust can now perform one central payment run, once a week – rather than 19 every fortnight. Remittances are consolidated so suppliers can easily understand what the payments relate to.

#### 5. Scheduled reports to budget holders.

iplicit's Scheduler feature sends reports to budget holders on specified dates. "It's helping headteachers and all budget holders understand what funds they've got remaining," says Nicki.

#### 6. Easy audit.

The team was able to give its external auditors read-only access to iplicit. When it came to a statutory HMRC audit, the inspectors were impressed. "The comments from the two auditors were that we had the Rolls-Royce of finance systems," says Nicki.

#### 7. Ability to quickly add academies.

When two more schools joined the trust, the team could add them to iplicit "very quickly and easily", says Nicki. "Because we had such good training at the beginning, we didn't have to ask iplicit to do the work for us."

All these things added up to big efficiency gains. "Things that used to take days now take minutes – and there are some tasks we don't even need to do any more because they've been fully automated," says Phil.

A staff survey confirmed that impression. "People were saying that their workload over year-end had halved or was a third of what it was. All the potential we saw in the system, we've realised," he adds.

- Agency staff bill reduced by £300,000 with the help of better reporting
- Data used to inform behaviour management and staff structures
- Many finance tasks cut in half or eliminated

# The outcome

## Hundreds of thousands of pounds released for education thanks to better data

The efficiencies achieved with iplicit have been felt where it matters most – the classroom. Staff who spend less time on process-based tasks can instead concentrate on activities that make a bigger difference to children. "The efficiencies of the system and opportunities for new ways of working it provides have also meant that when people leave the organisation, we don't have to replace like for like – we might be able to employ another teaching assistant instead," says Phil.

iplicit's reporting and analysis helped the school review its staff costs and structures. "One of the main challenges for us is the cost of supply teachers. Now, with the features and functionality iplicit provides, we can understand not just how much we're using but why. Is it vacancies? Is it short-term or long-term sickness?" says Phil.

With the help of that analysis, the trust developed a staffing structure that was "lean but not brittle" and saved £300,000 on agency staffing.

iplicit has even helped shape behaviour management. After breaking down repair and maintenance costs into vandalism, planned work, emergencies and remedials, the trust used the vandalism data to inform behaviour management plans.

Louise Creed says the ability to see reports throughout the year has helped her direct resources more effectively. "I can say to my business manager 'We're struggling with this group of children, we want to put some more support around them' and he can say 'There's this amount of money left for us to spend'. I can then effectively plan and say, we can get another TA, another HLTA, we can think about other teachers."

She adds: "I didn't come into this business for the finance side of it. I'm in this job to educate children and the system is going to enable me to do that more effectively."