Forest Research achieves year-end accounts certification on schedule despite the challenges of a pandemic

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The public services forestry research agency for England, Scotland, and Wales was one of the first Central Government organizations to achieve accounts certification, months ahead of its counterparts, despite the Covid-19 restrictions.

Forest Research has standardized on an intuitive, unified finance and HR enterprise resource planning (ERP) platform from Unit4 to put the right information into the hands of the right people – revolutionizing operations. The Finance Director best sums up its impact: "I absolutely love Unit4. Their technology, people, and roadmap for the future ensure Forest Research consistently meets its financial, compliance, and efficiency goals."

Key benefits include:

- One of the first Central Government organizations to achieve accounts sign-off, despite the Covid-19 restrictions
- Accurately met annual revenue break-even budget and effectively utilised capital expenditure within budget
- Paid 99.6% of suppliers within 10 days, well within Government guidelines
- Single, golden record of finance and HR accelerates decision-making and agility

Sustainable forestry in England, Scotland, and Wales

Forest Research is the research agency of the Forestry Commission and Great Britain's principal organization for forestry and tree-related research. It is internationally renowned for the provision of science, research, evidence, data, and services in support of sustainable forestry.

Prior to implementing Unit4, when it came to finance and HR data, Forest Research couldn't see the wood for the trees. A third-party shared services environment led to separate silos of data, fragmented knowledge, and delayed decision-making. "Half of our income is from government, the other half from external sources, including the commercial sector and EU contract work," explains Meirion Nelson, Finance Director. "It is essential that we have a single source of finance and HR truth. The management information that provides enables us to be more confident in our decisions, consistently hit financial targets, and drive a great employee experience."

Industry
Public Services

Location
Farnham, U.K.

Size
250 staff; locations across England, Scotland, and Wales

Product
Unit4 Enterprise Resource Planning (ERP)

Challenges

Enable public services forestry research agency to accurately and efficiently achieve financial compliance, while simultaneously meeting the demand for automated, engaging people services.

Key metrics

One of the First

Organization's to lay accounts before Parliament, despite lockdown

99.6%

Of suppliers paid within 10 days

"I absolutely love Unit4. Their technology, people, and roadmap for the future ensure Forest Research meets its financial, compliance, and efficiency goals."

Meirion Nelson
Finance Director, Forest Research

The journey to implementing Unit4 was kickstarted by a rigorous procurement process, using the G-Cloud Framework. "We shortlisted 20 solutions and demoed five of those. Unit4 stood head-and-shoulders above the competition. The breadth of functionality, intuitive user experience, rapid cloud integration, and professionalism of the Unit4 team are staggering," says Meirion.

Live on time, this forward-thinking ERP system comprises a comprehensive, connected finance (GL, AP, AR, Procurement, Sales Orders, Project Basics, Billing, Pricing, and Fixed Assets) and HR (HR, Absence, Timesheets, and People Planner) platform. This single, integrated view provides Forest Research with a powerful platform for growth and accountability. The team can harness meaningful insight to transform the workplace, take control of every finance process, and optimize business planning.

Take finance, for example. As a non-profit organization, Forest Research needs to meet its annual budget: any surplus needs to be returned; any deficit accounted for. With Unit4, Forest Research has complete, up-to-the-second, and flexible finance reporting. "We got our break-even spot on this year, recording a very, very small surplus, thanks to Unit4. The platform gives us unprecedented accuracy," says Meirion.

Accounts certified well in advance of counterparts
Forest Research was also one of the first public authorities to lay

its accounts before Parliament this year, despite the shutdown caused by the Covid-19 pandemic. Meirion again: "That golden financial record transforms the speed and simplicity of financial reporting. Our accounts for the year ended March 2020 were certified by the National Audit Office and laid before Parliament ahead of the vast majority of other public institutions. We are one of the first organizations in Central Government to achieve accounts sign-off, demonstrating that the system and configuration are resilient, despite the Covid-19 restrictions. Most Central Government organizations are working to end of September timescales and our accounts were certified in June."

Supplier management has been modernized too. By automating and standardizing all stages of the procurement cycle – from services requests, indirect purchasing, and requisitioning to paying vendors – agility is everywhere. "Some 99.6% of suppliers are now paid within 10 days, well within the Government deadlines for payment."

Everyday transactional processes are now automated as well. For example, scientists and other staff members' timesheets, annual leave, and other HR processes are completed in a self-service environment in just a few clicks. Spreadsheets and other rudimentary time recording systems are a thing of the past. Moreover, procurement is quick and controlled: purchase orders can be raised automatically up to an agreed threshold, without manual finance intervention and approval.

"All of these self-service finance and HR capabilities are available to staff from any device. They can be working deep in the forest, and take 10 minutes out to record their time or receive approval for their requested holiday," says Meirion.

The Unit4 ERP platform is deliberately designed so that functions can be deployed out-of-the-box, with minimal customization. People enjoy using the platform, owing to its intuitive navigation, simple dashboard reporting, and mobile collaboration. And of course, being in the cloud, Unit4 is easy to manage, without the headache of upgrades, system maintenance, and expensive infrastructure investment. As a hallmark of the platform's flexibility, Meirion remarks, "All of our corporate services were in operation during the Covid-19 lockdown."

The implementation was managed by the Unit4 partner Myriad. "The Myriad implementation team are excellent; they're responsive and really understood what we were trying to achieve," says Meirion.

He concludes, "I absolutely love Unit4. Their technology, people, and roadmap for the future ensure Forest Research meets its financial, compliance, and efficiency goals. By putting the right information into the hands of the right people, Unit4 has revolutionized the way we do business, particularly from a corporate services perspective."

UNIT4
In business for people