Australian Government | Australian Charities and Not-for-profits Commission

Data#3 Customer Story

Australian Charities and Not-for-profits Commission

Australian Charities and Not-for-Profit Commission improves charity registration process

Data#3

Australian Government | Australian Charities and Not-for-profits Commission

Objective

The Australian Charities and Not-for-Profit Commission (ACNC) wanted to overhaul their registration form in order to simplify and accelerate the registration process for charities.

Benefits

- Faster, more accurate form processing
- Enhanced reporting analytics
- Improved de-bugging for forms that encounter errors
- Documentation to make further development easier
- Eliminated double handling of data
- Complex organisational rules and legislation documented to improve future maintenance
- Reduced new registration backlog
- Reduced manual collection accelerates registration process

Testimonial

"It is more intuitive, feedback is that it flows better, is easier to navigate, and requires less rework. Looking back and then seeing the results in our service standards, we ticked the boxes of what we wanted to achieve in service improvements."

Rob Jackson,
Director of Digital Services,
Australian Charities and Not-for-Profit Commission.

Approach

After defining the project, they sought submissions, and Data#3 was chosen for their ability to meet criteria at a competitive cost.

Project Highlight

"Looking back and then seeing the results in our service standards, we ticked the boxes of what we wanted to achieve in service improvements."

Rob Jackson,
Director of Digital Services
Australian Charities and Not-for-Profit Commission.

Solutions & Services

- ☑ Cloud
- ☑ Data & Analytics
- ☑ Project Services
- ☑ Managed Services
- ☑ Resourcing
- ☑ Microsoft Dynamics 365

**Australian Charities
and Not-for-Profit
Commission**

> **"Data#3 had the
> expertise needed
> and we knew they
> could deliver.
> They are a trusted
> partner who are
> familiar with our
> systems."**
>
> **Rob Jackson, Director of Digital
> Services, Australian Charities and
> Not-for-Profit Commission.**

The Background

Established in 2012, the Australian Charities and
Not-for-Profit Commission (ACNC) is the national regulator
of charities. It plays a vital role in ensuring that Australians
can trust and have confidence in the not-for-profit sector.

New charity registrations demanded significant administrative
overhead and an increase of new form submissions was
expected, so ACNC wanted to streamline the process.

The Challenge

From household names to niche organisations, the
charities and not-for-profit sector is prominent in a nation
that is known for helping others: Australia's charities
generate $190 billion in revenue and employ more than
10% of the workforce. Registering a charity or not-for-
profit requires providing a wealth of information to ensure
each applicant meets stringent standards. ACNC Director
of Digital Services, Rob Jackson, said this important step
was challenging.

*"As a regulator, we're responsible for registering
charities. An entity applies online through a form,
making a submission to us, then our team does
what is needed to make sure it complies. They identify
any risks to consider and perform a series of checks."*

*"We needed some help with our turnaround time. We have
service standards for the public that we are required to
meet. During registration, there was a lot of backward and
forward and we saw we could be collecting information
more efficiently. It is complex, requiring a lot of governing
documents, financial statements and other information."*

This "backward and forward" happened when information
submitted in the online form was incomplete, or additional
details were needed, so the ACNC registrations team
would need to contact the applicant and guide them
through each step. It meant that registrations took longer
and involved considerable manual processing, which had
the potential to increase the workload, and impact service
standards.

Some help was needed to navigate complex form
processing rules, and there was imperative to increase
documentation of business process to match it to
technical implementation. As is standard in government
organisations, ACNC abide by stringent guidelines, so the
internal team worked sought an experienced partner to
bring the back-end Microsoft Dynamics 365 foundations
to align with the organisation's needs, working with their
chosen hosted custom forms provider. The two providers
would need the capacity to work well in a multi-vendor
project.

*"Data#3 had the expertise needed [for the back-end
requirements] and we knew they could deliver. They are a
trusted partner who are familiar with our systems. We put
our requirements together internally and put a lot of thought
into our requirements, then presented them to Data#3. This
allowed us to start at a reasonable position,"* said Jackson.

Australian Charities and Not-for-Profit Commission

"The cutover was complex, we had to switch off and on, migrate to the new form, and we had to get the complex data migration completed to be successful. It was a team effort."

Rob Jackson, Director of Digital Services, Australian Charities and Not-for-Profit Commission.

IT Outcome

The in-house preparations performed by the ACNC team were essential groundwork, paving the way for agreed responsibilities and outcomes for the project Ensuring roles were understood up-front served to "de-risk" the process, explained Jackson, and gave a clarity that served in-house and external teams well.

"We knew we needed to be closely involved, with our team internally running it, our registration team as subject experts, our vendor experts needed to get an understanding of our processes, so together we knew where efficiencies could be found."

Starting with an extensive presales process, Data#3 specialists worked closely with ACNC to assist with form design and assess changes needed to update their system to support the new design. Together, the teams established a project management plan following a hybrid Agile methodology that enabled conclusion in time for the upcoming legislative changes. Jackson said that communication was key.

"It was the responsibility of the project manager on our side to make sure that the communication strategy worked. Data#3 provided a project manager to help. Data#3 knew our systems very well, as a managed services provider, so they could translate our needs into features on the platform."

"Sometimes, things were really complex. People in the business might ask for something, but it was not actually the best way to solve the problem. A good partner can see where it could be more efficient when done a different way, and we had that with Data#3."

While working with multiple internal and external teams can sometimes be challenging, Jackson noted that both Data#3 and the vendor that hosted the custom forms platform interacted well, and were professional in the way they worked together, along with the ACNC team, to focus on what was needed to achieve an outcome. "They made sure to know what charities need from us, and what we were trying to do. It was the first time that Data#3 had worked with our registrations team, and they had a rapid introduction to get their heads around what the clients of the registration team looked like.

"That is a really good skill, to understand us and pick up quickly what is needed. Without that context, they can't understand the risks for the client."

Once development was complete, Data#3 used the UAT environment to test and validate the user experience and data accuracy before embarking on a custom deployment plan devised together by ACNC and both vendors before going live.

"The cutover was complex, we had to switch off and on, migrate to the new form, and we had to get the complex data migration completed to be successful. It was a team effort."

"We publish data on the sector and it is an enormous part of our activities. We are seeing the service standard dividends in that data, we are seeing the benefits now, four to five months later."

Rob Jackson, Director of Digital Services, Australian Charities and Not-for-Profit Commission.

Business Outcome

While technology underpins the outcome, the true measure of success lies in the experience of ACNC clients and staff using the new registration forms, and the quality of data gathered and analysed.

"It was a change for charities, they were using something unfamiliar, so our work on change management was important, and we had Data#3's help with that where needed. We have an audience so large – 60,000 charities, plus advisors, lawyers, consultants and experts – some inevitably took longer but most users found it more intuitive. The feedback was overwhelmingly positive."

The project was completed on time with the skills of the project managers involved put to the test in a short timescale for so complex a project.

"It makes projects more complex when working with multiple suppliers, and the outcome is down to the skill of the project managers."

For customers, the registration process is completed more efficiently, and the more intuitive forms help them to understand more readily what information is needed. This makes the experience less stressful. For the registrations team, meanwhile, there is less need to repeatedly contact clients with additional questions, giving them more time for those needing extra guidance, and allowing them to reduce wait times.

"We have seen significant benefits to our service standards as the process is more streamlined. Completing the form is more like a conversation, using smart questioning to help get the right data up-front, without that back-and-forth."

"Different sized charities have different regulatory requirements, for example, and so each will be asked the right questions, and we can make decisions more effectively."

With any significant change such as this, Jackson said it is to be expected that there will be some fine-tuning as users begin to engage with the new system.

"When you're going live, if you find any issues, what's important is being able to solve them effectively. This is common after system changes, and how you respond matters. Data#3 was very helpful. Users can make user requests, and where needed we can do some finetuning."

"It really helps to document reasons for requirements, so that when someone makes a request, we can understand the reasoning behind earlier decisions."

The improved accuracy and reporting of data has been helpful in an organisation that, like most government organisations, must be transparent in its operations.

"We publish data on the sector and it is an enormous part of our activities. We are seeing the service standard dividends in that data, we are seeing the benefits now, four to five months later."

"Looking back and then seeing the results in our service standards, we ticked the boxes of what we wanted to achieve in service improvements."

Rob Jackson, Director of Digital Services, Australian Charities and Not-for-Profit Commission.

Conclusion

When planning a complex project, Jackson said that choosing the right partners is vital, and that it isn't enough to simply take instructions.

"Key to being a good partner is that they can challenge us. I wouldn't want to create a solution based on just what I say, I want you to help me find the best way forward."

"It was comforting that Data#3 knew what they were doing, we had an in-built trust. We already knew their capabilities and strengths and we were able to get into a good working cadence. They had a deep product knowledge, an understanding of our environment from working on bespoke elements."

Ultimately, ACNC is now in a position where clients can register more efficiently, thanks to the combined efforts of in-house and multi-vendor teams. Even an increase in registrations has not caused a backlog for registration staff.

"It is more intuitive, feedback is that it flows better, is easier to navigate, and requires less rework. Looking back and then seeing the results in our service standards, we ticked the boxes of what we wanted to achieve in service improvements," concluded Jackson.

Australian Charities and Not-for-Profit Commission

Data#3 and Microsoft

Since 1994, Data#3 has combined forces with Microsoft to help our customers adapt and grow. Today, we are Microsoft's largest Australian business partner with the highest level of competency across the Microsoft ecosystem. Our hundreds of accredited consultants are ready to help our customers deliver the digital future; from enhancing productivity and collaboration with Microsoft 365, Microsoft Teams Rooms, and the latest Surface devices, to transforming business processes with Dynamics 365, to ensuring our customers get the most value from Azure cloud. Our scale and expertise enable our unparalleled support to customers selecting, deploying, managing and securing Microsoft applications, products and devices.

Data#3 | **■ Microsoft**