Selenity Expenses Case Study

University of Lincoln becomes a better business with digital expenses

Background

The University of Lincoln, based in the city of Lincoln UK offers students degree courses underpinned by research engagement.

Universities have gone through a great deal of change over the past few years. No longer receiving funds from the Government, we continue to rely purely on fee paying students and attracting high calibre researchers and their research grants to survive. Many, like us at the University of Lincoln, strive to emulate successful businesses and are committed to being modern universities with a focus on improving efficiencies and providing better customer services.

With a staff of around 1,600 and an additional 1,500 part-time, student ambassadors and researchers also working for the University, we previously used a paper-based process to track and manage their expenses. This proved to be a time intensive and less than satisfactory approach as it caused audit chaos, paper receipts getting lost and general discontent from people who weren't getting paid their expenses on time.

This certainly didn't match our vision of becoming a modern university, so we realised that a major change in our expenses management needed to happen, to help turn our vision into a reality. We deployed cloud-based software, Selenity Expenses. The system means our staff can easily submit and track their expenses claims online or through the Expenses Mobile app, when they want, where they want, with the full audit trail easily accessible if required.

The 'cloud' expenses system was well received by our staff at the time and had a certain 'wow' factor when it was first introduced. It has since become an almost expected process, particularly by people we've attracted to the University from the private sector, many of whom have experienced using an online expenses management system. It also supports our image of being a global high-tech organisation.

We have seen a noticeable reduction in the amount of negative calls coming through to the payroll team, who no longer need to spend a proportion of their time as a service desk, because generally people are a lot happier logging onto the system to track their claims. We have basically given staff ownership of their claims and the tools to manage them, rather than payroll spending hours chasing the progress of claims around the University.

Not only has the payroll team become paperless, but we now have both traceability and auditability that we didn't have before. It is much easier to track exactly what stage a claim is at and whether it has been approved by the nominated manager, avoiding hours of chasing a claim around the University. I would say the cloud system has definitely helped us achieve our goal of improving efficiencies and providing a better customer service.

Earlier this year, we introduced a new HR and payroll system, which has its own integrated standardised expenses module. It is fair to say that, in so many ways, its features didn't come close to the stand-alone cloud expenses system we already have in place. We decided it was vital to keep the Allocate software running along-side the new HR and payroll system, otherwise we would be taking a step back, rather than forward in our expenses management.

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"Selenity Expenses has definitely helped us achieve our goal of improving efficiencies and providing better customer service. We have benefited from significant savings in procurement and the cloud based software has helped the University track its assets more effectively."

Ian Hodson,
Head of Reward and Deputy Director of HR,
University of Lincoln

Duty of Care

A significant benefit to Selenity Expenses, alongside improvements in efficiencies, has been around the University's duty of care responsibilities to its staff. Our biggest claims are for mileage of staff using their own vehicles, as we don't have any pool or company cars. The Corporate Manslaughter and Corporate Homicide Act 2007 considers the vehicle as part of the workplace and driving any vehicle on company business, regardless of ownership, is subject to this legislation.

With so many of our staff using their own cars for University business, it is so important for us to make sure we have the correct checks in place to support our responsibilities for duty of care and the safety of staff members. Selenity Expenses has in-built features that will check every driver has a valid driver's licence, MOT certificate, insurance covering driving in work hours and so on, prior to recording any mileage expenses claims.

The whole process has become automated, so the duty of care reports we produce notify us whose insurance policies are due to expire and sends out reminders to staff accordingly.

Asset management

One of the biggest concerns for a large business or university like ours is keeping a closer eye on spending and understanding where and when purchases have been made within the University. When an expense is claimed for a work related item, Selenity Expenses records these purchases made on the asset register, which makes it easier for the University to track its assets.

We also benefit from significant savings in procurement. By having recommended suppliers on the Selenity Expenses system for items like stationary, books, periodicals, laptops and other equipment, we can avoid individuals sourcing their purchases from more costly retailers and claiming the money back from the University. More often than not, the procurement team can purchase the same item at half the price.

My advice to anyone looking to do the same rollout, would be to build a business case to justify going down this route. Any University looking to improve on customer service; auditability and tracking of expenditure; duty of care and supporting strategy and operations needs to think that if you don't do it now, when will you do it? In the meantime, there is every chance you might be losing university assets you don't know you were paying for, paying over the odds for equipment un-necessarily or leaving yourself open to the threat of corporate manslaughter with insufficient checks on duty of care.

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