

# St. Luke's Anglicare solve their acquittals demands



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St Luke's Anglicare is a not-for-profit organisation operating in the north western region of Victoria and the neighbouring Riverina district of New South Wales. The organisation provides services to children, youth and families as well as providing mental health, disability and financial counselling services. St Luke's Anglicare has an annual turnover of approximately \$15 million and employs around 300 staff.

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## First impressions

When Georgena Stuckenschmidt turned up for her first day as the new Chief Financial Officer at St Luke's Anglicare, it didn't take long for her to realise that the organisation's financial software was incapable of meeting the extensive reporting required of a not-for-profit group.

Stuckenschmidt explains, "The application was over ten years old and it didn't have the flexibility to produce the user-defined reports needed to manage our complex funding and project accounting."

To get around the problems, Finance staff completely relied on Microsoft Excel and CSV files to manipulate reports. "Although this worked, it took a lot longer to get the information. We'd have to take in data in its raw state, manipulate it to get it into a reporting format that I could work with and only then we could we start analysis," she adds. "While this could take up to a day each time a new report or analysis was required, during budget time it would take at least 2 to 3 days. Even standard monthly reports were taking 2-3 hours each every month."

## Rebuild or replace?

By March 2008, the amount of time being lost to data manipulation and the sheer difficulty of accurate reporting made it apparent that the system had to be replaced.

## Solution Snapshot

### Solution

Infor FMS SunSystems with Contract and Service Billing

### Benefits

- Complete visibility of project funding
- Much better financial management due to improved project controls and organisation-wide reporting
- Days of time saved each month through reduced data manipulation and automated reporting

Stuckenschmidt notes, "What we were looking for was **increased project analysis over income and expenditure**, and the ability to report back to project staff in a timely manner."

St Luke's also identified the potential for greater automation through electronic uploading of bank statements and wages information, automated allocation of expenses and recoveries, BAS calculations and EFT payments.

St Luke's was confident selecting Infor FMS SunSystems, an advanced financial management solution, because it is used by thousands of not-for-profit organisations around the world.

**"We chose SunSystems because PA had a great reputation in terms of consultancy, advice and support," says Stuckenschmidt.**

## Keeping it short and sweet

Implementation of SunSystems began immediately with a target completion date of August 2008. Although St Luke's set an exceedingly tight time-frame, Stuckenschmidt was experienced in financial software implementations and knew what to expect. **"We had confidence that PA could implement the software on time and on budget."**

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The solution easily solved the critical ad hoc inquiry needs for interrogating the funding and procurement data (and everything else in the ledgers). Contract and Service Billing addressed the problem of managing recurring contract invoicing, services invoices and ad hoc invoices.

## Satisfying the needs of users

It's been more than two years since the SunSystems solution went live at St Luke's and Stuckenschmidt says that the quality of reporting has vastly improved. **"Having SunSystems in place means that the data falls out of the system in the way we want it to. It's given us much higher visibility over our spending and the data we collect is enabling us to make better decisions and act more quickly to address variances.**

"We have close to 120 project cost centres that we produce profit and loss reports on every month. Whenever we need to work out why there's a variance, it is a lot easier to drill down and find the answers," Stuckenschmidt explains. **A key goal of the project was to make reporting much easier. In addition, the accounts team have saved, on average, 12 hours a month.**

## The future

Currently all financial reports for St Luke's are generated by the Finance team before being saved as PDF files and emailed to managers across the organisation. The introduction of SunSystems has made this a much simpler and speedier task than before and Stuckenschmidt is keen to further streamline the process. In the future she plans to provide managers with access to the system so that they can generate their own reports as required.

To improve procurement, Stuckenschmidt is keenly investigating iPOS for SunSystems. She's also looking at introducing SunSystems budgeting and forecasting. "We have it as part of our solution but due to time constraints, we haven't implemented it yet," she says.

*"Working with PA has been a great experience. Their project management and help desk are fantastic and they are very professional in their approach to implementation. I have to say they haven't let me down at all in terms of service. They do it so well."*