

MYOB Advanced

CLIENT	Uniting AgeWell Limited
PRODUCT	MYOB Advanced
PARTNER	Stratus
LOCATION	Victoria and Tasmania
INDUSTRY	Aged Care



Uniting AgeWell: with age comes wisdom – and better systems

As project manager Andy Burns says, we all hope that when we age, we'll be well looked after. For over 60 years, that's exactly what not-for-profit aged-care organisation Uniting AgeWell has been doing for Australia's older population.

Since mid-last century, small aged-care facilities were established by individual congregations of the Uniting Church in response to the needs of older people in their local communities. In 2004, the Church brought these groups together to form Uniting AgeWell (then known as Uniting Aged Care).

Today, Uniting AgeWell is one of the largest not-for-profit providers of residential and community aged-care services in Tasmania and Victoria. Since the beginning, their mission has been to provide specialised services, enabling older people to maximise their independence and wellbeing and access care when required.

Aging population, greater strain on resources

Like many countries around the world, Australia's population is growing older, with more people needing aged-care services than ever before.

While the aging population now has many more aged-care services and support options, the Australian Government's most recent push has been to help keep people at home for as long as possible – with the support of additional in-home care services.

Uniting AgeWell has over 2,500 residential care and independent living unit clients across Victoria and Tasmania. But it's the demand for in-home and community care that has "gone through the roof" – not only reflecting the desire for people to remain living independently at home and government initiatives but also as a side-effect of COVID-19.

"We've probably got over 9,000 in-home and community-care clients, and that part of our business has seen tremendous growth in the last year," Andy says.

Changing business needed new and improved system

Andy has been with the 'Uniting' family for several years. After a long career in corporate finance and systems, he worked for the Uniting Church for a year before transferring to Uniting AgeWell two-and-a-half years ago as a project manager.

Like many long-standing organisations, there are parts of Uniting AgeWell that have stood the test of time – respect, partnership, wisdom, fairness and stewardship – but some of their systems needed an upgrade.

Finding a new contracts management and purchase-order system had been on the cards for a while, Andy says, and it was one of the early projects he needed to get over the line.

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An uncoordinated and temporary system

Too many things slipping through the cracks

For some time, Uniting AgeWell used proprietary software for their purchase orders and their supplier management.

Even though only temporary, it was a clunky and disjointed system that made keeping tabs on contracts, compliance documentation and a huge volume of transactions extremely difficult.

The old system was a double-edged sword – without access, operational staff lacked visibility. Giving too many people access meant the data became hard to manage.

With almost 3,000 staff across 60 sites, the organisation had to find a new system that provided greater oversight, compliance over the many individual suppliers, ease of access and a tighter control on spending.

“We wanted one source of information across all Uniting AgeWell where staff could get access to read-only files and see what suppliers we are already working with in their area, to streamline the number of suppliers we use and negotiate bulk pricing, and see what contracts we had in place and when their compliance checks were due for renewal,” Andy explains.

MYOB Advanced meets all business criteria

System ticks three mandatory boxes

Uniting AgeWell looked at various systems in detail, short-listing three options before making the final decision.

MYOB Advanced won for three distinct reasons. It had the right functionality to meet the organisation’s non-negotiable requirements, it had the right price and it was a flexible system that could be customised.

“We had some pretty specific needs that were showstoppers, and MYOB Advanced was able to meet those,” Andy says.

Also, with staff working in the field and throughout the organisation’s various facilities, having a cloud-based solution was a critical part of the selection process.

“No point having a system if it only meets 50 per cent of our business needs. It needs to meet close to 100 per cent – or at least 99 per cent – otherwise, it will not be suitable for the organisation nor meet our business needs.”

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Better system opens doors to business improvements**Using purchase-order data to negotiate bulk pricing**

What Uniting AgeWell originally scoped as a smaller part of the overall business requirements for their new system, has fundamentally changed the way the organisation manages its suppliers.

Alongside a streamlined PO system, they've implemented new processes, item categories and a strict hierarchy of controls to help with manager approvals. Most importantly, the system is simple and easy to use.

Once a purchase order has been raised, it follows an automated approval process hierarchy. When approved by the Manager, a PDF copy with the organisation's standard terms and conditions is automatically emailed to the supplier.

They've also added a search function so the finance team can use data mining to negotiate better deals like bulk pricing with suppliers.

"If we're using five suppliers to purchase one type of item, why not use one supplier and get a better price?" Andy says.

"Before putting the new system in, we had no real visibility of that information – now we're dealing in facts," he adds.

Significantly improved internal controls

With this system, the team has been able to close the gap between purchase orders being authorised and invoices getting paid.

New suppliers cannot be set up unless a specific form is completed and automatically goes through to the contracts department with the visibility needed to properly manage the process.

"It's improved our internal control significantly, and there is a lot more information available at our fingertips."

Quick win: compliance checklist

Finally, the organisation can now stay on top of all their many supplier compliance obligations – using a simple yet comprehensive set of required compliance attributes built into the system.

"For us, compliance is not negotiable. If we haven't made sure our suppliers have up-to-date compliance checks and insurance, then we suspend them and do not use them until they are compliant," Andy says.

Uniting AgeWell has also customised system alerts that pop up in advance when a supplier's compliance checks are due for renewal. For the contracts department this is a big win – not only can they now work proactively, but it also helps the team maintain better relationships with suppliers.

"It means senior management now has confidence that we've got a compliance system in place that won't fail us."

Like any business, needs will change over time, but Andy has confidence in a system that can be changed and modified to grow and adapt to the ever-changing business environment.

"Sometimes you can do all the specs in the world, but it's when you start using a system that you start thinking about ways to do things better."

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60 years of Uniting AgeWell

- + An incorporated entity, owned by the Uniting Church in Australia (Synod of Victoria and Tasmania) but operated and managed independently
- + Started as small community-based aged-care groups run by individual congregations, brought together as Uniting AgeWell in 2004
- + One of Australia's largest not-for-profit providers of residential and community aged-care services in Tasmania and Victoria

Doing better business with Advanced

- + Simplified purchase-order process with better approval controls
- + Can use data to improve supplier contracts, pay suppliers quickly
- + Cloud-based system: staff working remotely can place orders
- + Supplier information in one system accessible across all departments and locations
- + Compliance system that makes senior management happy
- + Lots of room to grow – more modifications can be made later