



Marketing the Barwon Disability Resource Council



The Barwon Disability Resource Council and the Leaders for Geelong Project Team acknowledges the Wadawurrung People of the Kulin Nation as the Traditional Owners and Custodians of the land which this project was completed. We pay our respects to their Elders past, present and emerging. We acknowledge Aboriginal and Torres Strait Islander people as Australia's First Nations people.

It always was and always will be, Aboriginal land.

*Image: Murrup Laarr (Ancestral Stones) by Dr Deanne Gilson
Ballarat, Wadawurrung Country*



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Barwon Disability Resource Council (BDRC)

Our sponsoring organisation, the BDRC, have contributed significant time and support throughout this project.

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We would also like to thank the rest of the BDRC team, Anita and Melinda for answering all of our many queries and questions.

The Project Team was very fortunate to work with people who are truly passionate about what they do for disability support and advocacy within the Greater Geelong Region.

Committee for Geelong

The Project Team would also like to acknowledge and thank the Committee for Geelong (CfG).

Thank you to Catherine Bell, Leadership Portfolio Facilitator, for mentoring us through the Leaders of Geelong Program and to Karen MacAdie, Leadership Portfolio Coordinator, for the significant work and effort in coordinating the Program for us all.

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Project Mentor

Special thanks also goes out to William Ramirez for his ongoing support and guidance as our Project Mentor.

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Foreword



David Petherick Executive Officer

The Barwon Disability Resource Council has been operating in Geelong and the Barwon Region since 1975. Our core business is providing individual advocacy support to people with disability, and/or their carers', who are often experiencing a crisis. We are a small not-for-profit organisation and sustainability is always a challenge.

The demand for our advocacy support is very high and we are not able to meet that demand with the funding we receive from the State and Federal Governments, and so we are constantly looking at ways we can provide more access to high quality advocacy support for more people.

We are very grateful for the support of both the Give Where You Live Foundation and the Geelong Community Foundation. They have both provided us with grants over the years that have enabled us to provide much needed support to many more individuals who would have otherwise been turned away.

We have also set up Barwon Disability Plan Management to provide services under the National Disability Insurance Scheme (NDIS) and this small business contributes to our capacity to provide advocacy services and supports our sustainability.

We were looking for some help to grow Barwon Disability Plan Management and to promote the work we do, and so we were thrilled when our application to have a team from the Leaders for Geelong Program help us with this work was successful.

The team we have worked with on this project have been wonderful. They are a very impressive group of people and we are thrilled with the results they have delivered for us, which you can read over in the appendix to this report.

If our team from the Leaders for Geelong Program are representative of the quality of leadership that exists in Geelong, then we are in good hands.



Executive Summary

Everyone deserves the right to receive the support, services and resources they need to get the most out of life.

The Barwon Disability Resource Council (BDRC) is one of Australia's longest serving not-for-profit disability advocacy organisations, opening its doors in 1975.

The BDRC relies heavily on a combination of grants through other not-for-profit organisations, and budget allocation from the Victorian and Commonwealth Governments to deliver these vital services to the Barwon Region.

As the economic climate of both the State and the Commonwealth is becoming less conducive to funding not for profit services, Government funding is no longer a guarantee, nor a sustainable way for the BDRC to keep its doors open and continue their support services. The BDRC have identified an opportunity to increase the National Disability Insurance Scheme (NDIS) plan management services they currently provide, to build a more sustainable operational and financial model for the ongoing longevity of the organisation.

This project through the Committee for Geelong's Leaders for Geelong Program was to develop and deliver a Marketing Plan that will identify strategies to build upon their existing plan management clientele. This will bring in more revenue to the organisation to allow them to continue to deliver free disability advocacy for so many of those who rely on them.

The Marketing Plan was delivered in a multi-tiered approach. Tier 1 focused on what the BDRC could do here and now with little time or resources and no financial output. Tier 2 targeted strategies that utilised some minimal financial input based off the growth and strategies within Tier 1, with an expected timeframe of implementation in the next 6 months to 2 years. Tier 3 focused on longer-term goals for the BDRC and strategies to align to this, for ultimate delivery within 5 years' time.

Some of the project's key strategies within the Marketing Plan focus on growth through social media and website usage including creation of news stories and posts across varying platforms, through to simpler methods such as including the business on directories such as the Yellow and White Pages, or the City of Greater Geelong's Community Directory.

These strategies are heavily focused on one main aim; getting the name 'the BDRC' out further in our community. This project's intention is to make the Barwon Disability Resource Council, the BDRC, a well-known name throughout Geelong and the wider Barwon Region, so that the positive changes the BDRC makes to people living with disability in our region can extend further than ever before.



Overview of BDRC

The BDRC was established in 1975 to provide free advocacy services to all people living with disability in the Barwon Region and beyond. As the only advocacy service of its kind in the region, the BDRC has a strong presence in the not-for-profit sector and relies on a mix of Government and charitable funding. The mission of the BDRC is to promote the rights of people with disability and foster social and economic inclusion.

The BDRC's purpose is:

- To provide information and advocacy to people with disabilities, their families and carers in the geographical area of service covered by BDRC.
- To promote positive change in the lives of people with disabilities, their families and carers.
- To promote equal access of people with disabilities into the community.
- To address systemic issues affecting people with disabilities.
- To assist individuals and groups to develop self-advocacy skills.

- To assist in the planning and regional development of disability services with appropriate government departments and other service providers.
- To identify, co-ordinate and implement appropriate community programs and projects in advocacy, information, accessibility and other issues of relevance to local communities and in keeping with BDRC's Mission.
- To identify, create and develop business opportunities that are appropriate and in keeping with BDRC's mission.

With the commencement of the National Disability Insurance Scheme (NDIS) in 2014, the BDRC saw an opportunity to assist people living with disability by providing help to manage their NDIS plans. As a registered NDIS provider, the BDRC help people claim expenses and services, and coordinating and reviewing their NDIS funding on a regular basis. The BDRC can also advise people on what can and can't be claimed as part of their funding.



Project Purpose

To support the Barwon Disability Resource Council in promoting themselves as a supplier of choice within the Greater Geelong Region for plan management services. The project will deliver a Marketing Plan that outlines strategies for the organisation to implement to build on their existing base of plan management clientele to create a more sustainable operational and financial model for the organisation.

The reliance upon external funding sources for advocacy support, which are unpredictable and subject to removal at short notice, leaves the BDRC in the position of needing to create a more predictable and reliable income source in order to continue to offer free advocacy services to the community. The BDRC has identified that increasing the number of people they support with their plan management offering will create a more reliable cash flow to enable them to continue advocacy services and have certainty into the future.

The BDRC has made significant steps to evolve and improve its website, to make it more accessible and help people to understand what the BDRC does.

The BDRC has also changed the name of the plan management offering from “Green Pie” to Barwon Disability Plan Management (BDPM). The name of the advocacy services has also changed back from “Assert 4 All” to the BDRC.

The update of the website allows for the BDRC branding to be more easily linked to the service offerings, and there are plans to update the website to include case studies and testimonials from current clients.

The BDRC also prides itself on supporting its advocacy clients to become more self-sufficient through increasing their knowledge of disability services available to them, training and employment opportunities for longer-term personal independence.

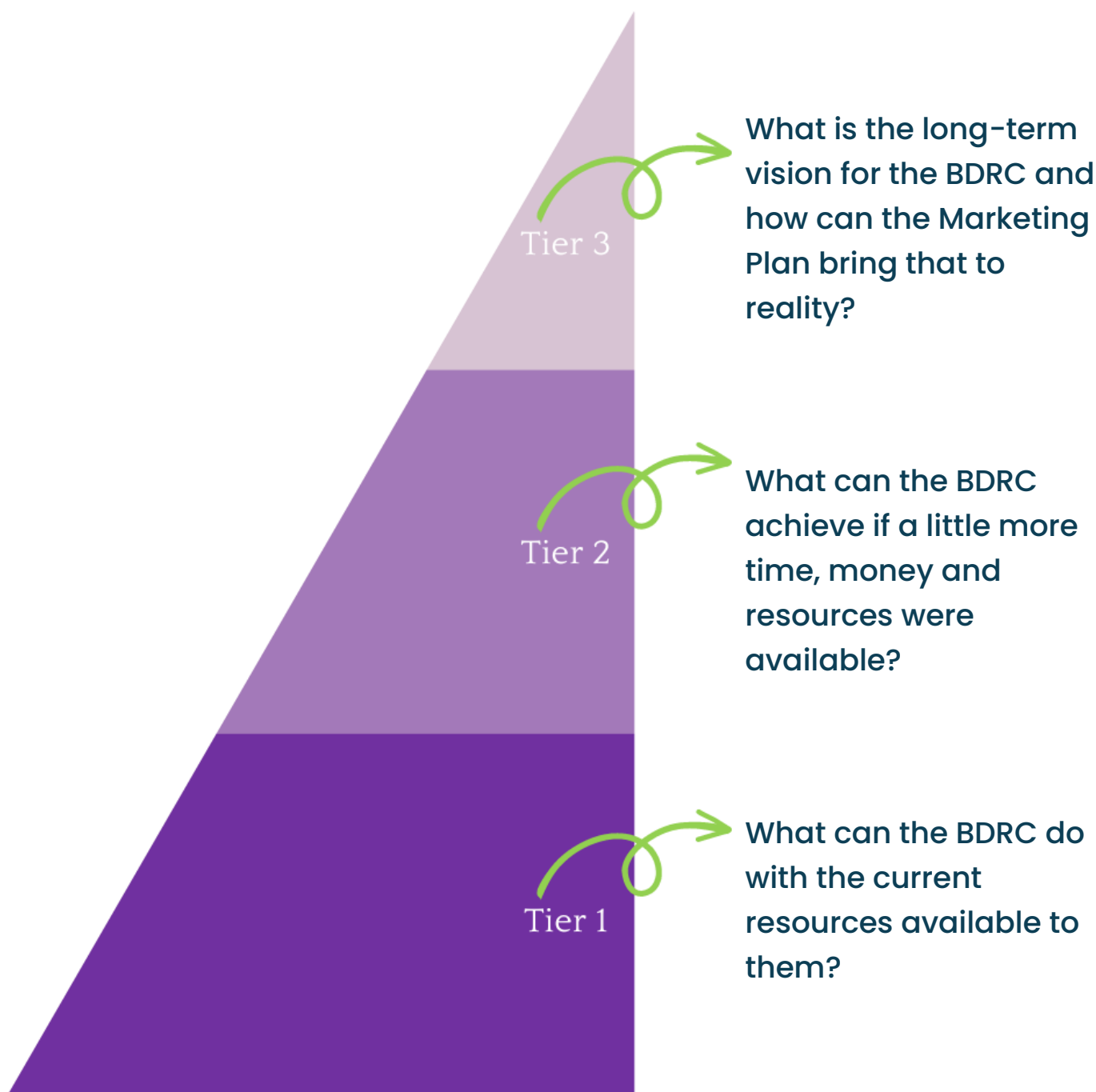


“When given the opportunity to meet with David in person to learn more about the project, I was amazed by the genuine desire to help people with a disability to get the most out of their life and the passion for their work displayed by staff at BDRC.”

- Nathan Gemmill

Project Approach

To meet the objective of increasing the client base for its NDIS plan management services, the Project Team recommended establishing a 3-tier Marketing Plan to create growth in a sustainable manner for the BDRC.





Achievement of the project objective required a thorough review and understanding of BDRC's current marketing practices and strategies implemented for engagement of members of the community.

The Project team identified four key areas of focus in order to ensure the success of the project could be met.

Those four key areas were identified as:

1. Interview and Review

Through interviewing BDRC staff directly regarding their current clients, stakeholders and marketing strategies, this would enable the Project Team to identify areas of opportunity and areas for improvements to bolster plan management client numbers.

2. Competitor Analysis and Review

By completing a desktop competitor analysis, this would allow the Project Team to review techniques for market engagement and client attraction.

3. Current Business Review

By investigating the BDRC's current position both in regards to finance and resources, the Project Team would be able to determine strategies aligned to the multi-tiered approach for the Marketing Plan.

4. Marketing Plan Development

With all information collated, the Project Team would be able to build and prepare a Marketing Plan which outlines avenues to attract new clients in the BDRC's current position (Tier 1), as well as outline future opportunities when growth occurs (Tier 2 and 3).

While competing with larger providers will always be a challenge for the BDRC, the intent and purpose of the Marketing Plan is to work within the existing position of the organisation to ensure that the great work of the BDRC can continue with the steady income stream provided by funds generated by the NDIS planning service.

Project Timeline





“When I was listening to David’s pitch, I realised that the values and mission of the BDRC aligned closely with my personal values, and the work that they do ensures that people who are marginalised by disability have a voice and get fair treatment.”

- Leah Menzies



Project Deliverables

The Project Team derived early on within the scoping of the project purpose that there were four key areas of focus to ensure the Marketing of the BDRC would be a success.

Interview and Review

The Project Team identified one of the first key deliverables was to interview and gather feedback from different personnel at the BDRC regarding their current clients, stakeholders and marketing strategies.

Undertaking these interviews and discussions enabled the Project Team to identify areas of opportunity for the BDRC to implement in their day-to-day and within their Marketing Plan and strategies.

These interviews also allowed the Project Team to review areas of improvement that the BDRC could make to support in bolstering their plan management client numbers.

In the interviews, the Project Team queried the following items and topics with BDRC staff:

- Objectives to achieve
- Timeframe to achieve objectives
- Target audiences
- Current marketing techniques
- Current challenges/pain points
- Measurement of engagement and success
- BDRC values and purpose
- BDRC legacy
- Predicated future models
- Social media presence





Competitor Analysis and Review

The Project Team also understood early on that the key to success within their Marketing Plan was to understand the scope of competing providers of NDIS Plan Management services in the Barwon and Greater Geelong region.

It was also determined that understanding how well-known and larger providers of NDIS Plan Management services undertook their engagement and reach was crucial in identifying not only differing strategies but also niches where the BDRC could focus in on to highlight how their small business could add greater value.

Nine competing providers were identified, three nationally based, with the remaining six locally based to Geelong and surrounds.

The team identified seven key features to review and build a competitor profile matrix to understand the differences between the BDRC and these competing providers.

These features included:

- Location (Geelong-based)
- Claim Management App (Mobile)
- Provides Individual Case Manager to Client
- Provides other services to the Client relating to NDIS Plan Management
- Use of testimonials or blogs for reach and engagement
- Social media presence and engagement on Instagram, and
- Social media presence and engagement on Facebook

These features were targeted to showcase both strengths of the BDRC and areas of opportunity that could be leveraged across either Tier 1, Tier 2 or Tier 3 of the Marketing Plan.

Further information can be found in Appendix A: BDRC Marketing Plan 2023.



Current Business Review

While undertaking the Interview process with BDRC staff, the Project Team took the time to ask questions and seek information to gain a thorough understanding of the BDRC's current state-of-play.

In gathering data and information to review the organisation's position in relation to finance, resources and existing workloads as a primary focus, the Project team gained a greater understanding of the implications and potential effectiveness of strategies that would be implemented within each tier of the Marketing Plan, but particularly Tier 1.

Marketing Plan Development

Most critical and crucial to the success of this project, was the deliverable of physically developing a Marketing Plan for use for the BDRC.

The Marketing Plan, built for immediate implementation by the BDRC, outlines avenues to attract new clients for NDIS Plan Management services right now, and long into the future.

The Marketing Plan expands on some of the organisations existing marketing strategies and ways of engagement of clientele, and explores differing avenues, from free of cost and low resource effort, through to more resource intensive and strategies that require upfront financial investment.



“After learning in more detail what David and the team do at BDRC and the passion towards their work, I was excited that I am able to help them promote themselves and provide them with a foundation for them to implement and grow for the future.”

- Samantha Thomas

Project Insights

The BDRC is the only disability advocacy service in the Geelong region. And with a reliance on a mix of government and charitable funding, it has been able to offer this service since 1975. In order to achieve a more stable revenue source, the BDRC commenced offering NDIS planning services in 2018.

While there is a wide pool of potential clients in Geelong, it became evident during the competitor analysis undertaking that the BDRC has to compete with multiple other providers who:

- Operate with the sole purpose of providing these services, and as such have marketing budgets and expertise to ensure they are visible and easily accessible, particularly in their social media and internal presence.
- Offer a range of other services, such as personal care, activities planning and therapeutic services, so they can “tie in” other services providing a single source for all the services a participant may need.
- Provide a digital platform and/or app to assist their client to navigate the service, which is a technological advantage that many clients would highly value.

The BDRC has an opportunity to highlight the small, boutique service it can provide and highlight the one-on-one personal offering, which can be done face to face to provide maximum support to participants. Not all participants are attracted by a mobile app or digital platforms, particularly those without technological skills, and those with particular disabilities, such as vision impairment or intellectual disability.

Being based in Geelong, and not a nationwide provider with thousands of clients, the BDRC can harness its local reputation and operational model to tailor its marketing to people who like a personalised and tailored service, with a single point of contact, who will do all of the “legwork” for them, rather than requiring participants to self-service through an app, relieving them of this responsibility. We used these insights to demonstrate that the BDRC can be seen as the provider of choice in the region, with sufficient clients signed up to ensure the long-term viability of the free advocacy model.

Challenges

Our focus was on how we can let people know the BDRC are there, and how they can help them, or someone they know, to ensure they get the services and resources to get the most out of life.



The challenge throughout the development of the Marketing Plan was thinking of strategies that would help boost the profile of the BDRC in its geographical location.

And not only was there the challenge of spreading the message of who the BDRC are and what they can provide to help them ensure the long-term viability of a free advocacy model but doing this within the constraints of the organisation's small workforce and limited budget.

With the current marketing strategy all word of mouth, the difficulty of not having staff with strong marketing knowledge meant that the marketing plan had to be simplified and easy for any of the BDRC staff to understand. There was no dedicated staff member for the implementation of the marketing plan, except for David which conflicted with his other duties.

Budget was a challenge; they say you have to spend money to make money but with a small not-for-profit organisation that is not feasible – in fact impossible. Creating an effective marketing plan can prove difficult when you have no money to put into the implementation.

Rate of growth also needed to be carefully considered when putting together the marketing plan; hence the multi-tiered approach. As the BDRC consist of 4 personnel, growth to quickly would leave the organisation under significant workloads and stress and would potentially diminish their highly regarded reputation.



Project Outcome

The Leaders for Geelong developed a tailored marketing plan for the BDRC based upon consultation with key stakeholders at the BDRC. This plan delivers a three-tiered approach for assisting the BDRC to develop its client base.

Marketing Plan

Prior to the Leaders for Geelong coming on board with the project, the BDRC had already done significant work to overhaul and upgrade their website. The revamped website is much easier to navigate and helps potential clients to understand how the BDRC can help them.

Driving potential clients to the website was a challenge, and it was identified that there are improvements that can be made to ensure that the BDRC is tapping into social media, local media and building public visibility to ensure that the BDRC is successful in getting the message out that it can help people not only with advocacy, but also with their NDIS planning.

The marketing plan has been developed in consultation with David Petherick and provides a roadmap from now to goals in 5 years' time for the BDRC to grow and maintain its profile within the Geelong community. By obtaining an additional resource through existing programs in local higher education facilities among a number of other strategies, the BDRC will be able to ensure its ongoing presence and viability into the future.



Accessi
ve

“After meeting with David and Anita, it solidified the opportunity this project had as I was able to see the passion the team had for helping the greater Geelong community and the drive to expand their work to help more people.”

- Aj Armstrong



Recommendations

The primary focus of the Marketing Plan is on what the BDRC can do to build their clientele base with minimal to no additional financial or resource output; this is Tier 1. Tiers 2 and 3 are recommendations for the BDRC to consider and implement in the future.

Marketing Plan: Tier 1

Tier 1 identified strategies including:

- Engagement of intern/work placement student to support in the delivery of the Marketing Plan.
- Creation of Instagram and LinkedIn social media accounts as alternative platforms for engagement.
- Creation of new content for website posts and updates to keep people visiting.
- Creation of new content for social media post and updates to engage with new audiences.
- Resharing posts, blogs and news stories from Funders, Governments (State and/or Federal) and other Providers/Services for reach and exposure.
- Meet with website developers on a quarterly basis to discuss analytics.
- Review social media analytics regularly for content attraction and understanding.
- Update business details online and in print to be consistent across all platforms.
- Leveraging local media for good-news stories to spread the message about the BDRC, who they are and what they do.
- Attendance at disability conventions, events, and conferences within the Region to engage with potential new clients, and
- Listing on the Greater Geelong Community Directory under Disability Services to promote themselves through new avenues.





Marketing Plan: Tier 2

Strategies within Tier 2 are focused for the next 6 months to 2-year timeframe, when there are more resources available. The marketing strategies identified consist of:

- Pay for social media ads to target new audiences that may not simply stumble across the BDRC's platforms.
- Partner with treating practitioners such as Psychologists, Occupational Therapists, and Speech Therapists to promote to people experiencing difficulty navigating the NDIS that the BDRC can support them.
- Update flyers and posters with current branding and up-to-date information.
- Hold information sessions across the Region regarding the BDRC to create greater awareness.
- Utilise testimonials and case studies on social media of people who have benefited from the care plan services provided, and
- Cross promote content across all platforms, including email marketing through newsletters.

Marketing Plan: Tier 3

The final stage of the Marketing Plan for the BDRC took a focus on business longevity and what the BDRC could do in a 2-5-year period. Tier 3 included:

- Promotions and prizes such as VISA Gift Cards for people who refer someone to the BDRC.
- Hiring of a marketing employee, either full-time or part-time, to relieve other staff to enable greater plan management capacity.
- Creation of a podcast to share information about care plans, the BDRC or case studies of clients to promote BDRC as a provider of choice, and
- Increase in paid advertising avenues such as Google Ads or real estate boards across the Region to help boost traffic to the website and obtaining analytical information to review time spent reading newsletters, or on the website.



Project Team Reflection

The Leaders for Geelong community project has provided us with invaluable insights into the not-for-profit sector, to which many of us had not previously been exposed to. In a city the size of Geelong, there are many layers of diversity and levels of vulnerability. Without the assistance of not-for-profits such as the BDRC, those with a disability would have no one to help them navigate the challenges of living in a world which is not designed to cater to them. The remarkable work that happens behind the scenes, largely unnoticed by the average local resident is what keeps Geelong and its residents safe, cared for and supported.

The Leaders for Geelong program has opened our eyes to the needs that exist in Geelong, but also to the incredible work of many unsung heroes who quietly and without fanfare, ensure that the vulnerable and disadvantaged receive assistance in various ways: providing food and access to housing, offering advocacy, educational support, medical care and much more.

They form the backbone of Geelong, yet unfortunately the importance of their work does not guarantee them adequate funding from the government. The contribution of Geelong's corporate and commercial players is often crucial to many of these services, and there are some organisations who rely solely on the contributions of benevolent funds and charitable donations to survive.

We have all walked away from the program with a deeper appreciation for the charitable and not-for-profit organisations which make Geelong the liveable and vibrant city that it is. We are also left with a resolve to do more as individuals to ensure that these incredible supporting organisations are recognised in the community and to share within our networks the opportunities that exist to contribute to making Geelong the best city it can be.

“When I first learned about the challenges BDRC was facing in terms of securing funding for their advocacy services, I was truly inspired by their determination to find alternative pathways to sustain these crucial services.”

- Majosh Joseph





Conclusion

Working with the BDRC, seeing the dedication and commitment of their small team to improving the lives of people living with a disability has been incredibly inspiring and eye-opening.

We hope that by implementing the marketing plan we have provided they can build their client base, achieving the dual aims of supporting more people to access the government supports they are entitled to and enabling them to continue their valuable work in providing advocacy for people with disabilities.

Although we have only worked directly with one not for profit organisation, our involvement in Leaders for Geelong has enabled us to see that there are many small organisations who deserve recognition for the incredible work they do. Seeing our fellow Leaders engage with their own projects with different organisations has also provided us with an opportunity to learn about the partner organisations and what is needed to keep their valuable work going.

Since the completion of the marketing plan, we have extended our support to the BDRC, by helping them kick-start their newly found marketing strategies. We have further supported the BDRC by:

- assisting them in the creation of a BDRC Instagram page.
- running a training workshop with the BDRC staff on how to use Facebook for Business including scheduling of posts.
- running a training workshop and establishing templates in Canva for use for creation of social media content, and
- design, development and printing of new BDRC business cards.

“Somewhere along the way, we must learn that there is nothing greater than to do something for others.”

- Martin Luther King Jr

Appendices

Appendix A – BDRC Marketing Plan



Marketing Plan

Creation date: August 2023

Next review: July 2024

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Business Overview

Business Name

Barwon Disability Resource Council (BDRC)

ABN

83 121 194 660

<https://abr.business.gov.au/ABN/View?abn=83121194660>

Vision Statement

Promote rights, social and economic inclusion for all.

Mission Statement

BDRC's Guiding Principles are in accordance with all articles of the United Nations Convention on the Rights of Persons with Disabilities (2008), including Equality and non-discrimination, awareness raising and accessibility.

Business Objectives

- To provide information and advocacy to people with disabilities, their families and carers in the geographical area of service covered by BDRC
- To promote positive change in the lives of people with disabilities, their families and carers
- To promote equal access of people with disabilities into the community
- To address systemic issues affecting people with disabilities
- To assist in the planning and regional development of disability services with appropriate government departments and other service providers
- To assist individuals and groups to develop self-advocacy skills
- To identify, co-ordinate and implement appropriate community programs and projects in advocacy, information, accessibility and other issues of relevance to local communities and in keeping with BDRC's mission
- To identify, create and develop business opportunities that are appropriate and in keeping with BDRC's mission

Business Goals

Short Term Goals

Goal/Objective	Description	By when
Increase market share	Grow the current NDIS plan management client base by 60 extra participants	31/03/2024

Mid Term Goals

Goal/Objective	Description	By when
Increase overall brand awareness	Become more recognisable in the Geelong region as the service provider of choice, being a local organisation	30/09/2025

Long Term Goals

Goal/Objective	Description	By when
Financial sustainability	The number of clients for NDIS planning remains consistently where the BDRC needs it to be to function independent of government or charitable support	30/6/2028

SWOT Analysis on Barwon Disability Resource Council

Strengths (What do you do well? What unique resources can you draw on? What do others see as your strengths?)	Weaknesses (What could you improve? Where do you have fewer resources than others? What are others likely to see as weaknesses?)
<ol style="list-style-type: none"> 1. Oldest service in the country 2. Empowers clients to make their own decisions on services 3. Focuses on all ages 4. Brand new website 5. Independent of service providers 6. Strong reputation as advocacy service focussed on the needs of people with a disability 7. Small organisation able to provide timely, personalised support 8. Good asset base – building, vehicles, cash reserves, ongoing advocacy funding 9. Strong links with community including CoGG, G21, Geelong Chamber, Committee for Geelong 	<ol style="list-style-type: none"> 1. Funding dependencies 2. Current marketing is via word of mouth 3. Lack of certainty in funding makes retaining staff more difficult 4. Increasing costs of compliance coupled with shrinking real funding to undertake compliance and other operating work impacts sustainability 5. Small organisation with small client base for Plan Management which makes us more vulnerable 6. Small organisation so less economies of scale 7. Nature of our work means we go quietly about our business so we can go unnoticed in community
Opportunities (What opportunities are open to you? What trends could you take advantage of? How can you turn your strengths into opportunities?)	Threats (What threats could harm you? What is your competition doing? What threats do your weaknesses expose to you?)
<ol style="list-style-type: none"> 1. Brand new website 2. Relatively small growth of 30, 60, 90 clients would have a strong positive impact on our sustainability 3. Inclusive and Accessible Geelong Project may bring new funding over next few years 4. Potential office space and funding to operate out of new Geelong Convention and Exhibition Centre due to be completed in 2026 5. Disability Royal Commission Final Report due in Sept 2023 will recommend increased advocacy funding 6. Potential strategic merger with like services to strengthen sustainability 	<ol style="list-style-type: none"> 1. Competing plan managers 2. Support coordinators recommending their own services rather than BDRC 3. Plan Management currently reliant on one staff member 4. Sustainability of whole organisation is undermined by loss of a single source of funding (DSF) 5. Increasing government preference for less funding contracts and so they prefer larger services to have those contracts 6. New DASH (Disability Advocacy Support Hotline) being trialled to provide advocacy support over the phone from a single National provider based in NSW 7. NDIS sustainability issues leading to loss of, or significantly reduced, access to Plan Management

Market Overview

Your Customers

Target Customers:

1. People with disabilities: The primary target customers are individuals who have disabilities. This includes individuals with physical disabilities, intellectual disabilities, sensory impairments, or any other form of disability.
2. Customers who need support to find services and resources: The customers require assistance and guidance in accessing relevant services and resources. This may include finding disability-friendly housing, healthcare providers, therapy services, employment opportunities, educational institutions, recreational activities, and other support systems.
3. Residing in the Barwon Region: The target customers are individuals who live in the Barwon Region. This area encompasses Geelong and its surrounding suburbs, ensuring that the primary focus is on serving the local community.
4. Eligible for NDIS funding: The customers must be eligible for funding under the National Disability Insurance Scheme (NDIS). The NDIS provides support to individuals with disabilities to enhance their independence, well-being, and community participation.
5. Lack a care plan or seeking better plan management: Target customers may either not have a care plan in place or require guidance to better manage their existing plans. This includes understanding their funding allocations, choosing appropriate service providers, and optimising the utilisation of their NDIS funding.

By focusing on these target customers, BDRC can effectively cater to the needs of individuals with disabilities in the Barwon Region who require assistance in accessing services and resources while maximising their NDIS funding.

Your Competitors

Competitor analysis: A review of the market indicates that the BDRC has several competitors who provide the same or similar services in terms of NDIS planning. The environment in which the BDRC operates is quite unique, given that the service is free of charge to the customer. This creates a need for the BDRC to differentiate itself from others who are offering the same service free of charge. As this service is offered by several competitors who operate nationally and statewide as well as smaller local providers, it is easy for the BDRC to become lost in the mix of several competitors. It also worth noting that several competitors have an advantage over BDRC because they

- Operate with the sole purpose of providing these services, and as such have marketing budgets and expertise to ensure they are visible and easily accessible, particularly in their social media and internal presence
- Offer a range of other services, such as personal care, activities planning and therapeutic services, so they can “tie in” other services providing a single source for all the services a participant may need
- Provide a digital platform and/or app to assist their client to navigate the service, which is a technological advantage that many clients would highly value

The BDRC has an opportunity to highlight the small boutique service it can provide, and highlight the one-on-one personal offering, which can be done face to face to provide maximum support to participants. Not all participants are attracted by an app or digital platforms, particularly elderly people, those without technological skills, and those with particular disabilities, such as vision impairment or intellectual disability.

The other service that the BDRC provides is free advocacy for people with disabilities. People who utilise this service could be a potential customer base for plan management services, as they are likely to be NDIS participants, and to benefit from having someone assist them in their dealings with the NDIS.

Being based in Geelong, and not a nationwide provider with thousands of clients, the BDRC can harness its local reputation and operational model to tailor its marketing to people who like a personalised and tailored service, with a single point of contact, who will do all of the “legwork” for them, rather than requiring participants to self-service through an app, relieving them of this responsibility.

Competitor Profile Matrix

Feature	NDSP	Bright Plan Management	Canny Group	Geelong Disability Services	Gateways	Assist Plan Managers	Sky Plan Management	Access Your Supports	ADPM	BDRC
Geelong-based	N	N	Y	Y	Y	Y	Y	Y	N	Y
Claim Management App	Y	Y	N	N	Y	Y	Y	N	Y	N
Uses Testimonials/ Blog	Y	Y	N	Y	N	Y	Y	Y	Y	N
Individual Case Manager	N	Y	Y	Y	Y	Y	N	Y	Y	Y
Provides Other Services	N	N	Y	N	Y	Y	N	Y	N	N
Instagram	Y	N	Y	N	N	Y	Y	Y	Y	N
Facebook	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y

Your Marketing

Marketing Objectives

Objective	Specific	Measurable	Achievable	Realistic	Timely
Increase BDRC brand awareness with current resources available	Have a solid marketing plan for delivering in the future that can be implemented easily	Increase of plan management client base (up to 60)	Staff will need to understand the marketing plan to help implement. Engaging in free marketing resources will help	Is part of the long-term marketing goal of being a sustainable organisation with a large pool of clientele	Within the next 6 months
Increase BDRC brand awareness and begin creating a substantial client base with some more resources available	Ensure BDRC is the service of choice by clients in the G21 Region	When people come to BDRC for Plan Management, ask them how they heard about BDRC to measure the marketing tools used	Engage with local TAFE or University for a marketing student(s) to assist in rolling out the plan	Is part of the long-term marketing goal of being a sustainable organisation with a large pool of clientele and ensuring the marketing of BDRC is successful	Within 6 months to 2 years

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Objective	Specific	Measurable	Achievable	Realistic	Timely
Increase and maintain strong brand awareness and service of choice long term	Ensure BDRC is the service of choice by clients in the G21 Region	When people come to BDRC for Plan Management, ask them how they heard about BDRC to measure the marketing tools used	With a more substantial organisation, more funds should come in and therefore employing a marketing person (part-time) or using a student to update and alter Marketing Plan over time	Is part of the long-term marketing goal of being a sustainable organisation with a large pool of clientele and ensuring the marketing of BDRC is successful and continues to adapt as the business changes	In 2 to 5 years

Marketing Strategy

BDRC's Service

Product or Service	Features	Benefits	Unique Selling Position	Support
Plan Management	Assist in managing client's NDIS plan to fund services and supports	Help clients maximise their plan and save time by dealing with their services, managing their budget, paying their invoices, and giving guidance. We will pay for the client's supports delivered, help them monitor their funds and provide financial reporting.	A completely independent and local plan management service based in Geelong, also servicing the Surf Coast, Bellarine, Golden Plains and Bacchus Marsh regions.	<p>As a plan manager, we can work directly with clients so that they can fund the services they need based on their unique situation.</p> <p>This includes helping them claim expenses and services and coordinating and reviewing their NDIS funding on a regular basis. As an approved NDIS provider, BDRC can also advise clients on what can and can't be claimed as part of their funding.</p>

The Promotion of BDRC

Product or Service	Online	Public Relations	Advertising	Promotion	Social Media
Plan Management	<u>Currently listed on the website</u>	N/A	<ul style="list-style-type: none"> Newly branded website New billboards put up outside the BDRC office (high traffic flow, low foot traffic) 	Word of mouth <i>(When Google search NDIS Plan Management Geelong, BDRC are at the bottom of the first page)</i>	Currently have a <u>Facebook page</u> with 267 likes and 279 followers. However, has not posted since December 2022.
Advocacy Services	<u>Currently listed on the website</u>	N/A	<ul style="list-style-type: none"> Newly branded website New billboards put up outside the BDRC office (high traffic flow, low foot traffic) 	Online and/or word of mouth <i>(Note: when Google search advocacy Geelong, Assert 4 All is still listed as the Google Business)</i>	Currently have a <u>Facebook page</u> with 267 likes and 279 followers. However, has not posted since December 2022.

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The People of BDRC

Name	Job Title	Responsibilities	Role in the Marketing of BDRC
David Petherick	Executive Officer	<ul style="list-style-type: none"> • Leadership • Compliance and Governance 	<ul style="list-style-type: none"> • Creating content • Delivery of Marketing Plan
Anita Winkler	Administrative Officer	<ul style="list-style-type: none"> • Administration incl. payroll • Back up for Plan Management • Website Management 	<ul style="list-style-type: none"> • Updating website • Undertaking Plan Management for extra clients • Support to implement Marketing Plan
Melinda Favento	Administrative Officer	<ul style="list-style-type: none"> • Plan Management • Back up for Administration 	<ul style="list-style-type: none"> • Support to implement Marketing Plan

Marketing Recommendations

Tier 1

1. Intern/Work Placement Student

Reach out to the Gordon and offer a placement for a marketing or community service student to obtain their placement hours with BDRC.

The hours can be flexible to work within the student's life and they will need a sound understanding of social media.

The work experience will cost BDRC nothing and will provide an extra resource for the organisation. This will bring someone with knowledge and skills to the organisation without the cost impact of hiring an employee.

The student will be temporary and not permanent, if this runs well this can be established with the education provider to be ongoing and a new student will volunteer their time to obtain work experience with BDRC.

2. Website Posts & Updates / Content Creation

Utilise the new website and the [News page](#) and create blog posts/news posts about what is going on at BDRC.

This can be anything from client stories, grant/funding updates. The posts do not need to be long (approx. 2 paragraphs and a featured image).

3. Creation of Instagram and LinkedIn social media accounts

Create social media accounts on Instagram and LinkedIn to create new ways people can discover BDRC.

4. Social Media Posts & Updates / Content Creation

The creation of the news posts creates content for social media channels (i.e. Facebook and Instagram). It is an easy way to share updates with followers of the channels.

This can be made simpler by utilising the scheduling tool in Facebook, this can schedule for both Facebook and Instagram platforms. Create a simple social media tile (through [Canva](#)) and create a short caption pulling from the blog post that is created, then add in the link to the post for people to click on and read more.

5. Reshare Posts from Funders, Governments, and Other Providers/Services

By resharing important or relevant posts to Social Media Stories or using the Repost App to share on to the BDRC feed, this will keep up engagement and allow followers to see what is happening and impacting BDRC.

Also, BDRC will start to come up as a recommendation to followers of those that posted the original, as that is how the current algorithm works.

6. Meet with website developers quarterly to discuss analytics

With the newly re-branded website, meet every 3 months with the developers to discuss the SEO (search engine optimisation) analytics and whether these need to be adjusted. The social media analytics can be brought into this as well to see if link clicks from social platforms are translating the website views. Determining how many clicks, how long people are staying on the website, their demographic and what pages are viewed most will help establish further marketing activities that need to be implemented and reveal the marketing activities that are working.

7. Update Business Details (Online and Print)

Updating the BDRC's Google Business details will remove confusion from old business names such as Green Pie and Assert 4 All which still display when conducting searches.

While it is a traditional method, some still use Yellow Pages and White Pages. It is free to list BDRC on there. It is a quick and easy process and ensures that wherever someone is searching for BDRC or Plan Management, BDRC will appear.

8. Update Business Details with Referring Parties

Remove all name associations to Green Pie and Assert 4 All by conducting a Google Search of these business names and contacting the referring parties (i.e. Barwon Health) that still suggest these to update to BDRC.

9. Story in Local Newspapers/News Sites

Contact local newspapers such as Geelong Advertiser, Geelong Independent and Geelong Times (Surf Coast Time & Bellarine Times) to highlight a success story in the advocacy space and mention the plan management in the story. Provide a compelling story that any of the above newspapers to get BDRC's name into the wider community.

Also consider News Sites (Bay FM online, Geelong News Now (Facebook) etc.)

10. Disability Conventions, Events & Conferences in the Region

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Investigate disability specific conventions & conferences in the region and set up a display to advertise planning services with current collateral you have. There is sometimes a fee, but sometimes they are free.

For example; Having a Say Conference, Geelong Inclusive Community Sports Day, Geelong Disability Expo.

11. List BDRC on the City of Greater Geelong Community Directory

List BDRC on the City of Greater Geelong's Community Directory and promote the NDIS plan management through this space.

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Marketing Activity/Milestone	Person Responsible	Date of Expected Completion	Example/Resource	Success Indicator
Intern/Work Placement Student	David	End of 2023 (Work placement student can commence Semester 1 2024)	<ul style="list-style-type: none"> • <u>The Gordon</u> 	<ul style="list-style-type: none"> • If the Gordon or another institute comes on board to provide a student.
Social Media Accounts	David	End of 2023		<ul style="list-style-type: none"> • Creation of the Instagram and LinkedIn accounts
Website Posts & Updates/ Content Creation	Anita & David	Ongoing	<ul style="list-style-type: none"> • <u>NDIS</u> • <u>Give Where You Live Foundation</u> • <u>Barwon Health Foundation</u> 	<ul style="list-style-type: none"> • Increased visits to website
Social Media Posts & Updates/ Content Creation	David	Ongoing		<ul style="list-style-type: none"> • Increase of engagement on Social Platforms • Increase of likes and followers
Reshare Posts from Funders, Governments, and Other Providers/Services	David	Ongoing		<ul style="list-style-type: none"> • Increase of engagement on Social Platforms • Increase of likes and followers

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Marketing Activity/Milestone	Person Responsible	Date of Expected Completion	Example/Resource	Success Indicator
Review website and social media analytics	David	Quarterly		<ul style="list-style-type: none"> Review website and social media traffic SEO review/updating
Update Business Details (Online and Print)	TBC	December 2023	<ul style="list-style-type: none"> <u>Search Plan Management on Yellow Pages</u> 	<ul style="list-style-type: none"> No reference to Assert 4 All or Green Pie when searching for plan management, advocacy or the BDRC BDRC listed in Yellow and White Pages
Update Business Details with Referring Parties	TBC	December 2023		<ul style="list-style-type: none"> No reference to Assert 4 All or Green Pie when searching for plan management, advocacy or the BDRC
Story in Local Newspapers/News Sites	David	December 2023		<ul style="list-style-type: none"> Exposure in local press
Disability Conventions, Events & Conferences in the Region	TBC	Ongoing		<ul style="list-style-type: none"> Client feedback of referral method

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Marketing Activity/Milestone	Person Responsible	Date of Expected Completion	Example/Resource	Success Indicator
List BDRC on the City of Greater Geelong Community Directory	David	December 2023	<ul style="list-style-type: none"> • Add your listing 	<ul style="list-style-type: none"> • BDRC listed under Disability Services on COGG Directory

Tier 2

1. Paid Social Media Ads

Start creating some social media ads that are focused on who BDRC are and what services you provide. This can be 1-3 different types of posts with different graphic tiles but with the same caption and targeted at different areas. These can run for as long as or as little as wanted, and the budget can be determined by BDRC before posting. Ads can also be ended early or extended.

2. Flyers

Update flyers with current branding. Ensure the content of the flyers are reflective of BDRC and what it stands for.

3. Connect with Disability Services for Cross Promotion

Connect with disability specific services such as Disability Specialist Schools (Nelson Park, Hamlyn Views, Barwon Valley) to advertise NDIS Plan Management services in their regular school newsletter.

4. Partner with Treating Practitioners

Investigate possibility of partnering with treating practitioners such as Psychologists, Occupational Therapists, Speech Therapists etc. This can promote to families that are experiencing difficulty in navigating NDIS that they can be supported by BDRC – emphasising mutual benefits.

5. Hold Information Session for BDRC across the Region

Create free information session mornings or evenings to create awareness.

Work with libraries, community centres and neighbourhood houses to connect with local people who are looking for plan management or advocacy services.

6. Testimonials and Case Studies Published to Social Media/Website

Share stories of current/past customers with disabilities who have benefited from your care plan service. This can help build trust and demonstrate your commitment to serving the needs of this community.

7. Cross Promote Content across all Platforms

Email marketing of content being published to social media and website.

Use the content from the website and social media to send out newsletters to clients, supporters (donors or grant makers), and anyone in the database. Ensure an opt out button is there for people to unsubscribe.

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Marketing Activity/Milestone	Person Responsible	Date of Expected Completion	Cost (\$)	Example/Resource	Success Indicator
Paid Social Media Ads	David	Ongoing	Low Cost		<ul style="list-style-type: none"> • Increase of engagement on Social Platforms • Increase of likes and followers
Flyers	David or Intern	June 2024	Low Cost		<ul style="list-style-type: none"> • Client feedback of referral method
Connect with Disability Services for Cross Promotion	David or Intern	Ongoing	Free		<ul style="list-style-type: none"> • Increased engagement, reach and knowledge of BDRC • Client feedback of referral method
Partner with Treating Practitioners	David	Ongoing	Free		<ul style="list-style-type: none"> • Increase number of referrals coming through treating practitioners
Hold Information Session for BDRC across the Region	All staff	1 year + (Ongoing)	Free – Low Cost		<ul style="list-style-type: none"> • Increased engagement, reach and knowledge of BDRC • Client feedback of referral method
Testimonials and Case Studies Published to Social Media/Website	All staff	1 year + (Ongoing)	Free		<ul style="list-style-type: none"> • Increased engagement, reach and knowledge of BDRC • Client feedback of referral method

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Marketing Activity/Milestone	Person Responsible	Date of Expected Completion	Cost (\$)	Example/Resource	Success Indicator
Cross Promote Content across all Platforms	David or Intern	1 year + (Ongoing)	Free – Low Cost	<ul style="list-style-type: none"> • Campaign Monitor • Mailgun 	<ul style="list-style-type: none"> • Analytics from marketing services about time spent reading content • Client feedback of referral method

Tier 3

1. Referral Promotion

Run a promotion over a 4–6-week period (TBC) where each referral for a new client gets the referrer a \$50 VISA gift card.

Every person who refers a new plan management client will receive the gift card OR every person who refers a new plan management client will go into a draw to win one of 5 (TBC) \$50 VISA gift cards.

Note: the promotion could be any “promotion prize” deemed achievable by BDRC.

2. Hire a Marketing Employee

The ultimate goal for BDRC is to hire a part-time or full-time marketing staff member, whether it be a Marketing Coordinator or Marketing Manager. This person will oversee and run all marketing activities.

They will implement new strategies, create content, update website and social media platforms and update the Marketing Plan annually. This will also take responsibilities away from existing employees to allow them to undertake further plan management or advocacy support.

3. Podcast

The most popular way in 2023 that people obtain information is via podcasts ([mailchimp](#)). Develop a podcast to interview people with lived experience of disability and promote BDRC as provider of choice for NDIS Plan Management in the Region.

Cross promote on Social Media and website which will also create clips/content for Social Media.

4. Increase in Paid Advertising & Analytics

Paid Search Advertising (PPC) such as Google Ads to run targeted pay-per-click ads that can boost traffic to website.

Increase budget for social media advertising, analytic information and billboards/real estate boards around the Region.

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Marketing Activity/Milestone	Person Responsible	Date of Expected Completion	Cost (\$)	Example/Resource	Success Indicator
Referral Promotion	David	2 years +	\$50 (TBC) per new referral		<ul style="list-style-type: none"> Increase in client base
Hire a Marketing Employee	David	1-2 years +	TBC (dependent on employment arrangements)		<ul style="list-style-type: none"> Relieves all other staff of marketing duties so that they can solely focus on their main responsibilities
Podcast	David or intern	2 years +	Low Cost	<ul style="list-style-type: none"> Podcast Equipment available through Geelong Regional Library 	<ul style="list-style-type: none"> Increased engagement, reach and knowledge of BDRC
Increase in Paid Advertising & Analytics	Intern	2 years +	\$1-2 per clickthrough		<ul style="list-style-type: none"> Increased engagement from clients via Ad or Social Media Marketing

Organisational Implications

Barwon Disability Resource Council have limited to no budget for marketing their brand and services to prospective clients.

BDRC also has a small team with little experience in the marketing field.

Contingencies

The marketing recommendations are based off the research that the Leaders for Geelong working team have looked into.

The Tier 1 recommendations are strongly encouraged, whilst Tiers 2 and 3 are recommendations that can be implemented or changed depending on budget and the trends at the time of implementation. We understand and acknowledge that marketing changes and therefore note that the above recommendations are that and advise BDRC to review the marketing plan mid-late 2024 to ensure it is still current and aligned with BDRC.

Tier 1 can go as planned, as it is based on the current resources that BDRC have available to them.

Tier 2 is on the basis that more funding and resources will be available. This may take longer if engaging with TAFE's and Universities to get temporary staff/students to assist with the marketing implementation is delayed. Another contingency is that funding may not be available. If this is the case, then continuing with Tier 1 with a mix of a voluntary position will continue to grow BDRC.

Tier 3 is reliant on more funding which is not guaranteed, if the funding is not received then implementation of Tier 1 and 2 will be sufficient until that funding comes along.