CUSP Services presentation
Who is CUSP?

What are we providing?

Why?
Who we are

SME’s
- Credibility and experience
- Core staff
- NDIA knowledge
- Focus / growth
- Sector view

ConnectingUp
- Technology skills
- Industry visibility
- Core skills
- Partnering - vendors
- Marketing

4thought
- Program mgt
- Implementations
- Organisational change
- Business process
- BPaaS know-how

Unleashing the power of your not-for-profit.
Business Process as a Service
Why? *The NDIA payment rate assumes a very efficient org.*

Table 1 Transitional cost model

<table>
<thead>
<tr>
<th>Drivers</th>
<th>Assistance self-care – individual</th>
<th>Community support – individual</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Standard</td>
<td>High intensity</td>
</tr>
<tr>
<td>SACS</td>
<td>SACS 2.3</td>
<td>SACS 2.3</td>
</tr>
<tr>
<td>Direct salary</td>
<td>$21.30</td>
<td>$21.30</td>
</tr>
<tr>
<td>Client-facing time inc leave</td>
<td>85%</td>
<td>80%</td>
</tr>
<tr>
<td>Client-facing time exc leave</td>
<td>95%</td>
<td>90%</td>
</tr>
<tr>
<td>Supervision – span of control</td>
<td>1:15</td>
<td>1:15</td>
</tr>
<tr>
<td>Corporate overhead</td>
<td>15%</td>
<td>15%</td>
</tr>
<tr>
<td>Return on capital (margin)</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td><strong>Key costs</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Salary costs including client-facing time</td>
<td>$22.56</td>
<td>$23.96</td>
</tr>
<tr>
<td>On-costs</td>
<td>$8.76</td>
<td>$9.11</td>
</tr>
<tr>
<td>Corporate overhead</td>
<td>$5.53</td>
<td>$5.53</td>
</tr>
<tr>
<td>Return on capital (margin)</td>
<td>$1.93</td>
<td>$2.02</td>
</tr>
<tr>
<td><strong>Total per hour price</strong></td>
<td>$38.78</td>
<td>$40.62</td>
</tr>
</tbody>
</table>

While this is only the direct rate, it accounts for ~60% of NDIA spend.

They have assumed a set of very efficient organisations.

Typically backoffice costs are estimated to be more like 28% of turnover.

22% is as low as we have found to date.

Limited time available to get the required efficiencies.
“It can feel like overwhelming complexity everywhere you look in NDIS transition. Working with CUSP has allowed us to focus our energies on the other challenges”
Functionality, software selection and decision criteria
We started with a deep dive on functionality

Surveyed 137 Service Providers, mapped current usage, upcoming needs and what platforms they were using.

Built out functional and non-functional requirements.
Assessed the market options

Key criteria:

- SaaS (cloud based)
- Functional coverage
- Sector usage
- Cost
- Ongoing development potential
What services do we offer?
Enquiry and Intake

Monitor new and existing customer channels

Manage the phone queue.

Capture sufficient information

Initial qualification of customers - questions dictated by business rules to see if they are suitable, such as:
  • NDIA / other funding sources.
  • Family relationships
  • Key contact person
  • 3rd party medical contacts
  • Special information needed - safety concerns / risks
Enquiry and Intake - real world benefits

GP’s reception is the analogy.

CUSP will never make assessments, determine treatments or sign a contract, however the bulk of contact are simple transactions that don’t need that level of engagement. eg. reschedule an appointment, check on status of funding application, create a new service booking under an existing line item, enter details into the system...

Simple enquiries are dealt with. Complex enquiries are automatically routed to skilled practitioners within the customer.

This approach will reserve more expensive resources time to focus on key problems, but it also allows ensures we can track the history of engagement, objectively establish the commitments that have been made, and do this consistently.
Service Agreement management

This starts the NDIS Service Agreement process. Create the unique identifier.

Allocate to a support coordinator / team leader. Update service agreement with service description / goals / tasks.

Help ensure a timely registration and commencement of services.

Ensure accurate mapping to NDIA service items. Maintain a changing set of service items over time.
Service Agreement management - real world benefits

Service agreement line items are carefully mapped to NDIA service items. CUSP continues to update / map them as they change.

NDIS provides contracts that are heavily weighted towards the participant. This means consistency and accuracy of contracts is critical. We work with the service provider to limit the options to those that are approved by the service provider and permitted by the funding bodies. This minimises unintentional variations.

Correctly structured service agreements, associated line items and active monitoring of performance improves delivery performance over time. “If you can’t measure it, you can’t improve it”
Scheduling

Mobile workforce management. Allocation of tasks, reallocation as needed, data input for timesheeting, WH&S management and reporting, maintenance of recording of staff accreditation.

Allocation of associated resources, including vehicles and equipment. Sign in and sign out as needed.

Onboarding of new staff. Reallocation of software licences. [Provision of nominated equipment, BYOD etc] Initial training and ongoing support in the use of the systems.
Scheduling - real world benefits

An intuitive system, backed by effective training gives both the worker and the scheduler the ability to look at the calendar and immediately understand availability.

• On line, real time, with phone backup for more difficult situations.
• Capable of dealing with adjustments and last minute changes.
• Less time waiting, negotiating and / or back in the office.
• Less time ringing around and waiting for an answer.
• Gradually eliminate excuses and exceptions.
• WHS compliance; monitoring check ins and outs

Least cost routing and (working on) automated claiming for travel.

Complete case notes and / or verifying delivery of the service real time and within the billable timeframe.
Accounts Receivable

Bulk upload of transactions to NDIA and other funding bodies.

Get remittance advice from NDIA portal

Reconcile total amount on bulk upload file versus what went into the bank account, identify errors. Minimise and manage exceptions.

Manage other revenue sources as needed. eg state government, self managed, privately funded, billed.
Accounts Receivable - real world benefits

The NDIA approach to plans has been variable at best. Items change without notice. Plans are terminated and renewed without notice. There isn’t notification of who is resolving issues.

Having experience of these issues as they arise across multiple service providers dramatically reduces the time taken to investigate, analyse and resolve issues.

Having experienced folk with the right tools also reduces the likelihood of systems errors.
Reporting

Standardised reports, eg:
• NDIS service agreements expiring in the next 90 days
• Jobs cancelled last month
• Participants without an active NDIS plan (target list)
• Service agreement status and balances
• Services delivered by worker last month (utilisation)
• Scheduled activities last month / Delivered activities last month
• Jobs not accepted / completed
• Data integrity reporting
Reporting - real world benefits

Salesforce is a very powerful reporting tool and provides an ability to interrogate the data to get real insights.

In many cases this can be bundled into standard reports, which we continue to build out. There is also the ability to quickly and effectively generate reports in support of audits, grant submissions, presentations and the like.

Learning how to use the system well takes some time. Centralising that means each service provider is not paying for training and time spent experimenting with the system.
High level walk through the system
Key steps within the system
### Service Agreement Details

**Service Agreement Name:** SA-00000003  
**Status:** Current

- **Funding Type:** NDIS
- **Client:** Mary Jones
- **NDIA Contract Number:**
- **Notes:**

### Financial Details

- **Contract Total:** $10,072.50
- **Total Delivered:** $1,236.63
- **Remaining Balance:** $8,775.87

### NDIS Information

- **Funding Management:** Participant
- **Funding Manager:**
- **Participant Nominee:**

### Service Agreement Items

<table>
<thead>
<tr>
<th>Type</th>
<th>Site</th>
<th>Service</th>
<th>Rate</th>
<th>Quantity</th>
<th>Total</th>
<th>Lead Provider</th>
<th>Delivery Location</th>
<th>Delivered</th>
</tr>
</thead>
<tbody>
<tr>
<td>Flexible</td>
<td>Aspect Northern NSW</td>
<td>individual counselling</td>
<td>1/1/2016 - 1/1/2020 $144.07</td>
<td>50 hours</td>
<td>$7,203.50</td>
<td>Registered Site</td>
<td>$0.00</td>
<td></td>
</tr>
<tr>
<td>Flexible</td>
<td>Aspect Northern NSW</td>
<td>specialised group early childhood interventions</td>
<td>1/1/2016 - 1/1/2020 $57.38</td>
<td>50 hours</td>
<td>$2,869.00</td>
<td>Registered Site</td>
<td>$0.00</td>
<td></td>
</tr>
</tbody>
</table>
Unleashing the power of your not-for-profit.

<table>
<thead>
<tr>
<th>TYPE</th>
<th>STATUS</th>
</tr>
</thead>
<tbody>
<tr>
<td>INDIVIDUAL THERAPY SERVICES</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SCHEDULED START</th>
<th>SCHEDULED END</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia/Sydney</td>
<td>Australia/Sydney</td>
</tr>
<tr>
<td>1st Aug 2016</td>
<td>1st Aug 2016</td>
</tr>
<tr>
<td>02:54 pm</td>
<td>04:54 pm</td>
</tr>
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</table>

<table>
<thead>
<tr>
<th>CHECKED IN</th>
<th>COMPLETED WORK</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Aug 2016</td>
<td>02:29 pm</td>
</tr>
</tbody>
</table>
Transition planning
We have implemented this solution multiple times.

Transitions can be a high risk undertaking and often end up failing or only partially done.

Key areas to address:
- Organisational readiness
- Organisational change
- Business process refinement
- Data conversion
- Role redefinition
- Governance / Project management
- Training
Our process
Starts with a check of the suitability

Business processes. Validate as suitable.

Map to roles.

Specialist functions – ie higher order rostering?
Measure the increased staffing needed

Service Provider with 500 clients

eg. Billing Transactions

CURRENT

4 times a Year

manual process requires additional staff

FUTURE

26,000 times a Year

Intake

Contract management

NDIA accounts receivable

Scheduling

Unleashing the power of your not-for-profit.
Step through reporting needs

Includes the indicators needed to manage in the changed environment

Strategy / growth plans

Unleashing the power of your not-for-profit.
## Identify the major cost components

<table>
<thead>
<tr>
<th>Staff</th>
<th>Software licences</th>
<th>Transition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enquiry processing</td>
<td>Lumary</td>
<td>Business process mapping</td>
</tr>
<tr>
<td>Scheduler</td>
<td>Skedulo</td>
<td>Organisational change</td>
</tr>
<tr>
<td>A/R administration</td>
<td></td>
<td>Project management</td>
</tr>
<tr>
<td>Reporting</td>
<td></td>
<td>Implementation</td>
</tr>
<tr>
<td>Vendor management</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

eg. Took on 3 staff

We have negotiated deals typically reserved for large players

Needs to be fully scoped

We have negotiated deals typically reserved for large players

Needs to be fully scoped

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*Unleashing the power of your not-for-profit.*

*Powered by Connecting Up*
“It can feel like overwhelming complexity everywhere you look in NDIS transition. Working with CUSP has allowed us to focus our energies on the other challenges”

“The clear strategy of CUSP to provide services at an NDIS viable price was critical ongoing. We could tell CUSP realises that with the tight corporate overheads set by the NDIA, their services must sit in a tight price bracket to succeed”

“I’d be happy to take a call from any prospective customer for CUSP to share our experience”
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