

# How we work with you!

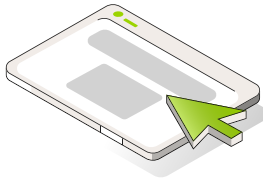
1



## Financial Expertise and Admin Support

We possess expertise in managing budgets, understanding funding guidelines, and navigating financial systems. This can provide valuable insights and assistance to support, while also handling administrative tasks such as processing invoices, managing payments, and maintaining financial records. This relieves coordinators of some administrative burden, allowing them to focus more on supporting their clients directly.

2



## Compliance Guidance

As plan managers we are well-versed in the intricacies of funding schemes, regulations, and compliance requirements. We can offer guidance to coordinators to ensure that plans adhere to relevant regulations and policies, reducing the risk of errors or non-compliance.

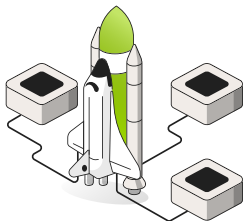
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## Resource Allocation

We can help coordinators optimize resource allocation by providing insights into available funding options, eligibility criteria, and funding limitations. This ensures that resources are allocated efficiently to meet the needs of clients.

4



## Problem Solving Assistance along with Training and Development

When coordinators encounter challenges or complexities in managing plans, plan managers can offer support and expertise to help resolve issues effectively. They may provide creative solutions or connect coordinators with additional resources or support services. We can also offer training and professional development opportunities for coordinators to enhance their skills and knowledge in plan management, financial administration, and compliance. This helps coordinators stay updated on best practices and regulations. with additional resources or support services.

5



## Communication Bridge

We aim to serve as a communication bridge between coordinators, funding agencies, service providers, and other stakeholders. They facilitate effective communication, collaboration, and coordination among all parties involved in plan management.

# Next steps

## How we work with you

Overall, CPR Plan Management can play a crucial role in supporting coordinators by offering expertise, administrative assistance, compliance guidance, resource allocation insights, problem-solving assistance, training opportunities, and facilitating communication. This collaborative approach helps ensure the effective management and delivery of services to clients.



## Next steps as a Coordinator

1. Jump on our website and have a look around,
2. Book a follow up meeting with Amanda or one of our founders.
3. Start the process to set up a referral program with two way traffic to provide the best outcome for participants at no cost to either party.



## Participant Referral's

1. Referral's can be as simple as providing the following QR code to our service agreement for participant to fill out



# CPR | PLAN MANAGEMENT

## Registered NDIS Provider

