

Setting up as an Independent O&M Service Provider in New Zealand



These suggestions come from the cumulative experience of OMAA members. Readers need to check the currency of information and evaluate its relevance in their own situation.

1. Getting started.

- a. Do you want to be a Sole Trader (1 person) or a Company (2+)? These are different identities under New Zealand tax law. <https://www.business.govt.nz/getting-started/choosing-the-right-business-structure/becoming-a-sole-trader/>
You can look up companies on the public register:
<https://companies-register.companiesoffice.govt.nz/>
- b. As a sole trader you will need to register for GST if you turn over \$60,000 per year or more.
- c. Register for an NZBN – this is free. <https://www.nzbn.govt.nz/get-an-nzbn/get-your-nzbn/>
- d. Register as an Accident Compensation Corporation (ACC) Vendor Provider if you plan to do ACC work: <https://www.acc.co.nz/register-as-an-acc-vendor/>
Note that O&M Specialist is not on the list of allied health providers <https://www.acc.co.nz/for-providers/provide-services/register-health-provider/#who-can-register-as-a-health-provider>) but registration with the professional body is important when applying, so make sure you have your COMS and OMAA registration (ROMSA).
- e. Get some insurance – see Aon and others for professional indemnity and public liability.
- f. Get some advice on running a small business and start work on your business plan.
Search online for government websites, start-up checklists, start-up grants, webinars, local small business support groups, breakfast meetings.
<https://www.business.govt.nz/how-to-grow/getting-government-grants/grants-and-help-for-your-new-business/>
- g. Update your CV – Anyone might ask for your credentials, so have them ready with O&M qualifications, certification (COMS), OMAA registration (ROMSA), additional specialisations/formal training, work experience, professional memberships, awards, presentations and/or publications.
- h. Build emotional and professional safety nets: practise self-care; choose supervisor/s, mentor/s, business advisors and subject matter experts; schedule regular meetings with one or more people for accountability, debriefing, scoping and troubleshooting; join an O&M Community of Practice; consider risks and risk management.

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Printed FAQ05 v1.1 Published: April 22 Author: LD (PSC) Approval: Executive

2. Service profile.

- a. What will you offer and how will you package it? Are there gaps in the market? What are you good at? Consider who, what, when, where, why, and how. Who will pay (e.g., ACC, Self-funded schools, local councils for environmental consultations, private clients or BLVNZ/ BLENNZ contracts)? Check the OMAA O&M Scope of Practice and make sure you don't step onto the turf of other professionals.
- b. What will you not do, and who will you refer on to?
- c. Meaningful work is not always paid work. What do you need to be paid for, and what will you do for free?

3. Budget & fee structure.

- a. Consider visible and invisible costs – time for new learning, research, and resource development; setup and running costs for office and travel; professional development costs; membership fees; access to resources; advertising; ACC levies, and provisional tax
- b. Position yourself in the market and decide your fee scale. You might charge a range of fees depending on your time, the type of job, expertise required, preparation, reporting, complexity, travel time.
- c. Consider whether you want to contract to an organisation for more secure income or work directly with private clients with less certainty but greater agility.
- d. Work out how people will pay you for services and/or goods (e.g., long canes) – EFT, online (e.g., Square, Stripe), cash, etc.

4. Brand.

- a. Business name. You can just use your own name or choose a business name that makes it easy for people to find you. At the same time do a search for domain names so you can secure your online identity for your website. Don't make it too long, and something ending with .co.nz is ideal. Consider keywords and the balance between quirky/predictable/memorable in relation to search engine optimisation. If you want to protect your business name, then register it with Consumer Affairs or similar.
- b. Graphics. Devise a logo and suite of graphics that captures the essence of what you plan to do. Learn photoshop or pay an expert – quality is important for a professional image. You need 300DPI for printing and 71DPI for screen, with a range of sizes and shapes of logo for diverse applications
- c. Photos. Start collecting images (with consent) you can use in marketing and publications.
- d. Style templates. Work out style templates for print information then be consistent in implementing them. When choosing fonts, size, colour, contrast and formatting, follow guidelines provided by organisations such as BLVNZ (see <https://blindlowvision.org.nz/how-we-can-help/businesses-and-professionals/accessible-documents-and-websites/>) and the Round Table Guidelines for print accessibility <http://printdisability.org/> and Website Content Accessibility Guidelines

- e. Embed your branded identity in digital framework and hard copy: email account including branded signature, website, letterhead, business cards, fridge and car magnets, uniform, etc

5. Document suite.

What docs will you need in your paper trail? Begin with:

- a. Terms of reference – a document that defines your business, states your mission and values, scope of practice/service profiles, availability and selling points. This becomes a source document, providing ideas and text for advertising fliers, grant applications, etc.
- b. Referral form – online and hard copy. Make it easy for people to access your services
- c. Service agreement – you might need several, if providing different kinds of services (e.g., O&M client services, disability support work, teaching/training)
- d. Consent form – sharing information with other stakeholders (professionals, family), media release, transporting children, permission for de-identified data to be used in research...or not to share information ...
- e. what policies are required to meet compliance e.g. service boundaries, policies for complaints, privacy etc
- f. Invoice template
- g. Branded FAQs on relevant topics

6. Client management system.

- a. How will you manage the workflow of referrals, client work, reporting and stats?
Choosing between a manual system (e.g., Excel spreadsheet) and client management software might depend on how many clients you expect to have.
- b. How will you manage privacy, confidentiality, and data security (electronic, hard copy)?

7. Invoicing/accounting system.

- a. Check out the tax laws – What can you claim? What evidence do you need of income and expenditure?
- b. Consider whether you can manage the finances yourself. It could be worth hiring an accountant. <https://www.xero.com/nz/resources/small-business-guides/accounting/when-to-hire-accountant/>
- c. Choose between a manual system (e.g., Excel spreadsheet and individual invoice emailed to the client) and accounting/invoicing software (might be built into an online payment system).

8. Promotion plan

How will you spruik? not sure what this word is? advertise? your business?

- a. Get online and make a list of LV/blindness groups, eye care professionals, allied health

professionals who might refer to you.

- b. Face to face: host a launch party; drop in and introduce yourself, set up a meeting, or offer free PD; ask “what would make it easy for you to refer to me?”

FAQ05 v1.1 Page 3 of 4 Uncontrolled when Printed

- c. Print/handouts – develop some standard fliers, brochures, publications, as well as advertising for special events.
- d. Online – passive presence, or active social media? Consider Facebook posts, blogs, tweets, chat rooms, YouTube, podcasting.

