Settlement & Multicultural Services — Value Chain Map

Settlement casework · Community programs · Multi-funder delivery · Volunteers

Business Process Automate
a platform by Norbrik
SETTLEMENT & MULTICULTURAL SECTOR INSIGHT
NORBRIK · ISO/IEC 27001 CERTIFIED

Casework & client services · Programs, groups & volunteers · Operations · Eligibility & funder compliance · Wellbeing & referral pathways · Shared / data

Status & adoption: PROVEN ON BPA · BUILT ON BPA · START HERE · BUILD ON

CLIENT

STAGE 1 — Engage & Refer
Walk-ins, phone, community networks, partner and agency referrals, first contact record
- Intake — Referral pipeline
- Enquiry — Public forms

STAGE 2 — Eligibility & Status
Visa and residency status, program eligibility, consent, language and interpreter need
- Eligibility — Program checks
- Client — Household record

STAGE 3 — Assess & Plan
Needs assessment, goals, cultural context, risk screen, the support plan across programs
- Assessment — Needs & goals
- Support plan — Actions

STAGE 4 — Deliver Supports
Settlement casework, classes and groups, employment help, hardship relief, home visits
- Casework — Contact & notes
- Programs — Groups & classes
- Relief — Requests & approvals

STAGE 5 — Refer & Connect
Warm handover between internal programs, external referrals, wellbeing and clinical pathways
- Referrals — Internal & external
- Wellbeing — Follow-up

STAGE 6 — Evidence & Acquit
Participation, outcome measures, funder data submissions, incidents and complaints
- Funder — Data & acquittals
- Safeguards — Incidents

STAGE 7 — Exit & Re-engage
Case closure, independence and outcomes, return contact, alumni and volunteer pathways
- Closure — Outcomes
- Clients — Status & history

PROGRAM

STAGE 1 — Design & Fund
Program design, funding submission, targets, budget and reporting obligations
- Programs — Funding & targets
- Obligations — Report calendar

STAGE 2 — Enrol & Schedule
Expressions of interest, enrolment and waitlists, terms and sessions, venue and worker allocation
- Enrolment — Places & waitlist
- Sessions — Schedule & venue

STAGE 3 — Run & Attend
Attendance at the session, headcounts, participant feedback, materials and interpreter use
- Attendance — Session register
- Language — Interpreter use

STAGE 4 — Acquit & Review
Output and outcome counts against target, funder acquittal, program review and re-funding case
- Acquittal — Counts vs target
- Review — Program outcomes

OPS

STAGE 1 — Workforce & Volunteers
Paid staff and volunteer cohorts, bilingual capability, onboarding, training, supervision
- Workforce — Staff records
- Volunteers — Register & hours

STAGE 2 — Sites & Scheduling
Offices, outreach venues and rooms, worker rosters, language-to-client matching, timesheets
- Rostering — Coverage
- Sites — Venues & assets

STAGE 3 — Quality & Safeguards
Quality management system, audits, clearances, child safe standards, complaints and feedback
- Quality — Audits & actions
- Clearances — Checks & renewals

STAGE 4 — Funding & Finance
Multiple concurrent funding agreements, cost allocation across programs, payroll, budgets
- Grants — Agreements & claims
- Finance — Allocation & budgets

STAGE 5 — Governance
Board, strategy, risk, community accountability, advocacy and impact reporting
- Board — Packs & risk
- Analytics — Outcome KPIs

TYPICAL PROVIDER PORTFOLIO

Mix varies by provider · Commonwealth settlement + state grants + hardship relief + philanthropic funding

Settlement & Humanitarian
Settlement casework — orientation, advocacy
Newly arrived support — first years
Visa & status cohorts — differing entitlements
Housing & services access — navigation
Citizenship & civics — classes

Families & Children
Multicultural playgroups — early years
Parenting programs — group delivery
Family support — casework
School readiness — transition
Women's programs — leadership, safety

Youth, Employment & Skills
Youth casework — wraparound support
Holiday & group activities — engagement
Employment pathways — work readiness
Language & literacy — classes, conversation
Accredited training — certificate delivery

Inclusion & Wellbeing
Hardship & emergency relief — vouchers, crisis
Aged care supports — social, in-home
Disability & mental health — access support
Digital inclusion — literacy, devices
Community development — capacity building

INTERSECTION 1
Client / family — one family may sit across settlement, playgroup, youth, employment and relief at the same time

INTERSECTION 2
Funding agreement — each program answers to a different funder, spec and acquittal cycle over the same clients

INTERSECTION 3
Session / attendance — the unit of evidence for group work, and the number every funder asks for

INTERSECTION 4
Language & culture — drives worker matching, interpreter cost, translated material and how outcomes are measured

INTERSECTION 5
Consent & referral — determines what can be shared internally, with partners and with each funder

WHERE THIS WORK TYPICALLY LIVES TODAY

The common provider current state — the same client re-keyed once per funded program

Client records
A separate spreadsheet or folder per program · **Caseworkers**
MANUAL

Attendance registers
Paper sign-in sheets, later typed up · **Program staff**
MANUAL

Funder data submissions
Hand-built each period from several sources · **Program managers**
MANUAL

Relief & hardship approvals
Paper forms and email sign-off, spend tracked late · **Team leaders**
MANUAL

Volunteers & clearances
Spreadsheet of names, expiry dates chased by hand · **Volunteer coordinator**
MANUAL

Outcomes & board reporting
Numbers re-collected and reconciled each cycle · **Exec**
MANUAL

COMPLIANCE & ASSURANCE

The questions a board asks — and where the answer comes from

Who accessed this record, and when?
Row-level security on every register, plus a complete change and access history. Answering it is a query, not an investigation.

Can we produce the evidence for a funder or quality audit?
Evidence assembles from the records that ran the work: attendance, case notes, approvals and acquittals. Nothing is reconstructed the week before.

What is expiring next month?
Clearances, funding agreements and report due dates carry their own dates and chase themselves, so nothing lapses quietly.

Who approved this, and on what basis?
Approvals record the decision, the approver, the conditions and the time, held against the record rather than in an email thread.

Does our reporting reconcile to source?
Every number on a dashboard or funder report traces back to the record that produced it. One data model, no parallel spreadsheets.

Where does our AI send our data?
AI runs inside your own tenant on your own data, with the audit trail and cost ledger attached, and a person approving the decisions.

THE PLATFORM UNDERNEATH
- ISO/IEC 27001 certified
- Australian owned & operated, Sydney based
- Tenant isolation & row-level security
- Complete audit trail
- Single sign-on & MFA

THE BPA PLATFORM — HOW IT HELPS

One platform · configured, not coded · delivered by Norbrik · ISO/IEC 27001 certified

BPA (bpautomate.com) is the business process automation platform built and delivered by Norbrik. Registers, forms, approval workflows, portals, dashboards and AI agents are configured on one secure platform — so each opportunity below is a configuration exercise measured in weeks, not a software build measured in years. The point for a multi-program provider is singular: one client record, many funded programs. Capture the contact, the session and the outcome once, and let every funder report assemble itself from the same source.

Registers
Structured records for clients, households, programs, sessions, volunteers and funding agreements — with history, security and audit built in.

Websites, Forms & Portals
Mobile forms for intake, session attendance and relief requests, plus secure portals for partners and referrers — capture once, at the point of contact. The public website itself runs on the same platform, so a form on the site writes straight into the register behind it.

Workflows & Approvals
Eligibility checks, relief approvals, internal referral handovers, clearance expiry chasing and report-due reminders — they run themselves.

Dashboards & Reports
Live views over the same data — program managers, quality, exec and board see one truth; each funder's numbers come from source, not from a rebuild.

AI Agents
Summarise case notes, triage inbound enquiries in any language, draft acquittal narrative and flag clients falling out of contact — humans stay in control of decisions.

Integrations
Connects to payroll/finance, Microsoft 365, email and external APIs — BPA orchestrates, existing systems stay in place.

WORKED EXAMPLE — ONE FAMILY, FIVE FUNDED PROGRAMS, REPORTED ONCE

FORM
Intake captured once
Household, language, status, consent and needs on one structured form — not re-keyed by the next program.

→ REGISTERS
One client, many programs
Playgroup, youth, employment, English class and relief all attach to the same family record, each with its own funding tag.

→ WORKFLOW
Warm handover
An internal referral routes to the right team with consent already recorded — nothing restarts from scratch.

→ FORM
Attendance at the session
The register is marked on a tablet in the room, against the enrolled participants and the program.

→ DASHBOARD + AI
Every funder report from source
Counts, outcomes and narrative assemble per funding agreement — and the board sees the whole family, not five slices of it.

BPA AUTOMATION OPPORTUNITIES — WHERE THE PLATFORM FITS

Intake, Enquiry & Referral
PROVEN ON BPA
Public and partner referral forms straight into a triaged queue, with routing, acknowledgement and no re-keying — live in production today
Public forms · triage workflow · AI classification

Client Records & Casework
PROVEN ON BPA
One client and household record, contact notes, tasks and correspondence in one thread — the foundation every program shares
Registers · row-level security · audit

Program Enrolment & Attendance
BUILT ON BPA
Terms, sessions, places and waitlists, with the register marked on a tablet in the room instead of a paper sign-in sheet
Registers · mobile forms · capacity view

Multi-Funder Reporting & Acquittals
START HERE
Every funding agreement, its targets, its data spec and its due dates — period reports assembled from source, with the calendar chasing itself
Registers · dashboards · scheduled reports

Emergency Relief & Hardship
START HERE
Relief requests, eligibility evidence, approval limits, voucher or payment issue and spend against the funded pool in real time
Forms · approval workflow · budget view

Volunteers & Clearances
START HERE
Volunteer register, onboarding, training, hours contributed, and clearance expiry with automatic chasing across paid and unpaid workforce
Public forms · registers · reminder workflow

Website & Public Content
BUILT ON BPA
Public website pages, a service and program directory driven from the same registers as delivery, community-language content, password-gated partner areas, and referral forms that write straight into casework
Site Studio · collections from registers · public forms

Outcomes & Community Impact
BUILD ON
Outcome measures across programs, client journey over years, board and community impact reporting assembled from source
Registers · dashboards · AI narrative drafting

Where would automation give your frontline hours back?

We use this map as the starting point for a working session with your team — overlay your current systems, count how many times the same client gets re-keyed, and shortlist the two or three opportunities with the fastest payback. No obligation, and you keep the annotated map.

Book a discovery conversation

bpautomate.com · delivered by Norbrik · download PDF

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WHY BPA · NORBRIK
- Community services sector experience
- ISO/IEC 27001 certified
- Australian owned, Sydney based
- Platform + delivery from one team
- Fixed-scope SOW engagements