

Julie Burgess Inc.

Business Plan for Julie Burgess Heritage Listed Tall Ship

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Prepared by

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COMPANY STRUCTURE

Name: Julie Burgess Inc.

Entity Type: Incorporated Association (IA 12484)

ABN: 84 309 369 064

Contact: The Secretary
PO Box 166E
East Devonport TAS 7310

Phone: 0491 013 022

Email: admin@julieburgess.org

Website: julieburgess.org *(yet to be launched)*

Office: Reg Hope Park
Tarleton Street
East Devonport TAS 7310

SITUATION ANALYSIS

Julie Burgess Inc. (JBI) is in the unique position of having a fully restored and operational vessel gifted to them along with guaranteed funding for the next five years by the Devonport City Council.

The Julie Burgess has been operating in compliance with relevant maritime and statutory regulations for the past 7 years and as such has a well documented safety and operational procedure, a range of statistical visitor and marketing data and financial records on which to draw.

This provides the opportunity to make informed choices in the development of new/refined marketing strategies and products to build upon the solid foundations laid by the collaboration between Council and volunteers.

The current customer base mainly consists of visitors to the area with small numbers of local customers. Within existing operational and marketing strategies increased customer visits has been identified as crucial for continued viability with current sailing capacity averaging only 55% and equating to one fifth of 1% of total visitors to the area. Locals are advocates and volunteers, so are a vital part of increasing visits.

To date marketing strategies employed have consisted of low budget promotional activities without dedicated advertising funnels, a limited product offering due to a lack of resources and crew availability, and a reliance on spontaneous rather than planned visits.

A recently drafted marketing plan proposes an updated strategic model where community engagement, broadened product range, sponsorship, grant/investment funding offsets the deficit arising from the cost of attracting out of area visitors and the current operational challenges of bad weather, crew availability and sailing arena.

By leveraging the above with the experience, knowledge and passion of existing and new volunteers, and the chance to engage with the community and visitors in different ways as a not-for-profit community organisation, the Julie Burgess Inc. now has a wonderful opportunity to improve the value and status of the Julie Burgess as both an iconic heritage vessel and a tourist attraction.

CURRENT MISSION STATEMENT

Our mission is to operate the Julie Burgess in the best traditions of the sea whilst maintaining safety standards that are in compliance with all relevant regulations.

In doing so provide valuable publicity for our city through a strategically planned sailing program for both our home port and other ports.

Encourage volunteer participation; provide training and sailing opportunities for the community that promotes tourism and the regions rich maritime heritage.

DRAFT

BOARD OF MANAGEMENT

PRESIDENT:	Graham Kent
SENIOR VICE PRESIDENT:	Clyde Eastaugh
VICE PRESIDENT:	Lynn Laycock
SECRETARY/PUBLIC OFFICER:	John Groenewold
TREASURER:	Wendy Beaton
PUBLICITY & MARKETING:	Andrea Martin
COMMITTEE:	Brenton Jones Ray Borlini Tony McDonald Peter Hollister
DESIGNATED MASTER:	Graham Kent

BUSINESS SUPPORT GROUPS

The Julie Burgess team will work in partnership with the Bass Strait Maritime Centre and the Mersey Yacht Club where and when appropriate.

Other key partners are identified as part of the Marketing Plan.

LEGAL COMPLIANCE

Julie Burgess Inc., in keeping with best practice, will have in place all necessary insurances, certificates, registrations, licences and documents required by the industry governing and regulatory bodies.

Including, but not limited to:

Volunteer, Property and Public Liability Insurance

Current Operations Manual in compliance with AMSA Regulations and Standards

Certificate of Survey

Electrical and Process Flow Charts

Life Jacket Servicing Records

MSDS

Registration Certificates

Certificates of Operation

Registration of a Food Business

Liquor Licence

Beacon and Distress Signal Registration

Registration of Mooring

Radio Licence (ACMA)

Microsoft Licence

HUMAN RESOURCE PLANNING

The following units and associated tasks have been identified to assist with the fair and reasonable distribution of responsibility, effective business management and to inform policy and procedure manuals.

Roles will be filled by volunteer staff at outset and a future plan includes availability to provide work skills training programs by partnering with an existing training organisation and Skills Tasmania.

Operations

- Skipper/Master
- Sailing Master/Mate
- Purser
- Crew
- Trainees

Accounts

- Banking
- Accounts Payable/Licences
- Accounts Receivable
- Merchandising
- Purchasing/Ordering

Reception

- Front Desk
- Telephone
- Incoming mail
- Petty Cash
- Ticketing
- Manager of onshore site
- Bookings

Human Resources

- Rostering
- Record Keeping
- Workplace Health and Safety
- Police Checks
- First Aid Certificates

Administration

- Manifest production
- Photocopying
- Mail
- Letter/document production
- Filing
- Sailing Calendar

Marketing

- Web marketing *
- Content *
- Market Avenues *
- Public Relations *
- Grant Funding / Sponsorship
- Events Management
- Catering
- Newsletter

**details on marketing roles provided in Marketing Plan section*

OUR GOALS

Goals will be further developed and specified as future requirements and restrictions are identified. A list of measurable goals aligned with a marketing timeline will be released in later versions of this document.

For now our broad goals are:

Increased community engagement

Increased value added experiences

Wider audience attraction and retention

Increased revenue

Implement accredited work skills and sail training programs

More diverse volunteer recruitment and retention

Improve crew rosters and availability

Plan a variety of dockside experiences in collaboration with local organisations

Improved web and social media presence

Greater collaboration with local, state and federal partners

Increased grant funding and sponsorship revenue

SWOT ANALYSIS

Strengths Established Business Beautifully Restored Heritage Listed Tall Ship Skilled Team of Volunteers Guaranteed Funding (5yrs)	Weaknesses Crew Availability Rosters
Opportunities Develop and promote a variety of sailing opportunities for the community and beyond that promotes tourism and the regions rich maritime history	Threats COVID-19 Weather

Management of Weaknesses and Threats:

Develop a volunteer recruitment program that focuses on training and retaining valuable crew members.

In line with best practice, develop an effective rostering system that can guarantee crew availability prior to accepting prepaid advance bookings.

Implement and maintain current and relevant COVID-19 safety plan.

Plan for bad weather by having alternate activities available through key partners.

2020 MARKETING PLAN SUMMARY

The JULIE BURGESS



TALL SHIP EXPERIENCES

MARKETING PLAN

Product & Brand Positioning

The product range is dependent on the ever-changing COVID-19 restrictions as well as crew availability. There is a need to identify the key “fail safe” products, a creative range of ad hoc community engagement strategies and a major commitment to community services in order to appropriately leverage grant funding and sponsorship opportunities.

The Julie Burgess Inc. (JBI) needs to position itself as a vessel, venue and attraction operated by the community for the betterment of the community to preserve a living legacy for the region.

The products and services offered by the JBI will largely inform relationships with key partners and a realistic and unique offering, clearly defined and articulated by all advocacy avenues, is crucial.

In order to succeed the JBI need sky high profit thinking, innovative strategies, clear and consistent messaging, engagement with new and varied stakeholders and meticulous execution of services.

We've got the crew

...and our Mission Statement is our compass...



“A unique working tall ship restored and operated by a skilled team of passionate volunteers to preserve a living legacy, promote the beauty and history of our island state and to provide our community and customers with unforgettable experiences.”

Proposed Mission Statement

Brand positioning requires a refresh of previous community perceptions and as such clarity of purpose is required throughout the organisation. Mission statements and values as proposed below align our thinking, compel different people to become involved and champion our cause, and inform all marketing strategies.

The mission statement and values must distil our reason for being, inform all future strategy and branding and convey the importance of the Julie Burgess to motivate and engage advocates. Together they are the wind that moves us forward, the trim of the sails which speeds us along the path and the compass which guides us.

“A unique working tall ship restored and operated by a skilled team of passionate volunteers to preserve a living legacy, promote the beauty and history of our island state and to provide our community and customers with unforgettable experiences and accredited training.”

OR

“To preserve a unique piece of Australian maritime history as a working vessel, powered by the spirit of community, to promote Tasmania and to provide community services, education, experience and entertainment.”

Proposed Values

Adventure

Embodying the spirit of adventure and the pursuit of unique memorable experiences

Teamwork

Trust, collaboration and contribution to the preservation of a living legacy for future generations

Community

Listening, learning and growing together through the sharing of skills, stories, values and experience

Resilience

Strength and cohesion in the face of adversity

Respect

To hold each other, our surroundings, our heritage and our history in the highest regard

Products Range

Membership / “Friends of the Julie Burgess”

- Tiered membership: Active Member, Non-Active Member, Families
- Sponsorship opportunities

Community Engagement

- Sponsor Events (Team building/sail/canapés)
- Community Services Free sails (morning/afternoon tea for community organisations)
- Service Club Dinner Meetings (promoting services on offer for under privileged / chronically ill / disabled / lonely / nursing homes / aged day care centres)
- Aboriginal & Torres Strait Islander Sails

Education and Accredited Training

- Bass Strait Maritime historic education (schools / interest groups)
- Schools - pirate activities / food / knots, sails and chart reading
- High School / College – youth sail training
- Accredited Training via TAFE / AMC

Collaborative Community Events

- Musical / Artistic / Theatrical Events
- Community Events
- Food and Wine Festival and Jazz Festival
- Mother’s Day / Valentine’s Day / Halloween / Seniors Week,
- Steam Fest and Home Hill Fete
- Sailing days (Mersey / Leven)
- School holiday programs

Collaborative Tourist Experiences

- Food and wine tours
- Bike and walking tours
- Heritage tours
- Art / yoga retreats

Dockside Experiences

- Maritime History talks / theatre
- Mystery Tour / Theme nights
- Romantic Dining
- Musical / artistic events
- Culinary events (high tea, morning/afternoon tea, cocktails, meals, BBQ)

Ocean Adventures

- Two Hour Sails
- Special Events Sails
- Twilight Sailing
- River Cruising
- Overnight Adventures
- Major Multi-night Adventures
- The Wooden Boats Festival
- Family friendly Sails
- Scattering Ashes

Target Audience

- Members / Volunteers
- Community Organisations
- Sponsors / Grant Funding / Key Partners
- Local and North West residents (adventure / dockside experience / river cruise)
- Venue Hire / Private Functions
- Charter services
- Weddings
- Photographers / film makers
- Bloggers / Vloggers
- Spontaneous Visitors
- Families and children
- Schools
- Adventure tourists (thrill seekers / comfort adventure)
- Heritage tourists
- Artists / Writers
- Sail Trainees
- Boat building skill trainees
- Romantic experience seekers
- Professional team building
- Conference activities coordinators
- Singles / new to the community

Key Partners

In this current world climate of instability, community support and collaborative partnerships are key motivating factors for potential investors and members.

The success of the enterprise is solely dependent on the building of strong relationships with key partners who recognize the value and importance of maintaining the Julie Burgess in Tasmania.

- Devonport City Council
- Bass Strait Maritime Centre and Mersey Yacht Club
- Volunteers / Members and “Friends of the Julie Burgess”
- Sponsors and funding bodies
- Councils and Information Centres
- Tourism Tasmania / Regional Tourism Organisations / Interstate Tourism
- Spirit of Tasmania / Airports / Bus Companies
- Accommodation and Hospitality Operators
- Education & Training Providers
- Community Organisations and Service Clubs
- Maritime History Organisations
- Local Business Owners
- Food & Wine Operators
- Tour & Heritage Operators (such as Home Hill, Don River Railway, Redwater Creek Railway)
- Artists and Musicians
- Production and Theatre Companies
- Trip Advisor / Lonely Planet / Tourism Databases

Strategy & Tactics

To optimise the way customers discover, consider, buy, implement and advocate the products and services community consultation and involvement will be a key feature in all strategies and market research.

COMMUNICATIONS STRATEGY



**Members
Area**



Website



**Marketing
Calendar**



**Media
Strategy**



Facebook



**Community
Events**

Website

- SquareSpace or similar
- The Julie Burgess Story
- About Us / Mission Statement & Values
- Become a Member (crewing, maintenance, visitor, catering – link to online member form)
- Julie Burgess Crew only (private password area for training and internal policies / intranet)
- Become a Sponsor (Friends of the Julie Burgess)
- Products & Services (Online Booking integrated)
 - Accredited Sail Training / Education
 - Community Engagement / Community Services
 - Private Charter & Functions
 - River Cruising & Dockside Experiences
 - Premium Adventure / Heritage Experiences (collaborative with others)
 - Ocean Adventures (About, Choices, When, What to Wear)
- Upcoming Events (Online Ticketing integrated)
- Pricing & Tickets (Online Bookings integrated)
- Contact Us (and links to Social Media / How to find us google map)
- Happy Customer Reviews
- Media & Interviews
- Gallery / Ecommerce Section (Merchandise and Gift Vouchers)
- Policies (Cancellation / Privacy)

Online Booking System and Mobile Ticketing System

- Rezgo (or similar) – POS, Online Booking, Event Ticketing, Customer Manifests, Reporting, Cancellation and Reminder automation, Sale of Merchandise and Gift Vouchers

Facebook

- Events
- Newsletter/Scuttlebut
- About Us
- Members Private Group
- Newsfeed / Engagement
- Public posts / Reviews
- Photos / Videos

YouTube Channel

- Educational Material
- General Interest re Maritime History / Adventure / Tasmanian Tourism

Instagram

Integration and Reciprocal Links with Key Partner Websites/Databases

Marketing Roles

Web Marketing

- Graphic Design
- Web Designer
- Facebook Marketing
- SEO

Content

- Photographers
- Videographers
- Drone Pilot
- Content Writers

Market Avenues

- Community Engagement / Sales
- Flyers / Posters / Signage
- Market Research
- Grant Funding Coordinator

Public Relations

- Patron
- Ambassador/s
- Media Spokesperson
- Events MC / Public Speaker
- Chief Storyteller (Kids)
- Narrator for historic tours

Marketing Equipment

- Camera / Video / Drone
- Shade Cover for deck
- Historic Costumes?
- Dine In/Wine In
- Printer / Scanner
- BBQ
- Ambience (LCD candles?)

Marketing Budget

- Advertising
- Social Media
- Website
- Print Media
- Booking System
- Signage
- Events
- Design

Proposed Logos

Member voting closes as at 5pm 11 August 2020. Logo and related design elements will then be formalised and applied to web and print media moving forward to establish a new identity and encourage renewed interest.



FINANCIAL SUMMARY

Financial planning during this unprecedented period requires a systematic approach which allows us to realign our plans and actions that ensure resilience.

With COVID-19 restrictions in place and the unknown impact it will have on the business it is difficult to put together a cash flow forecast and budget for the next 12 months.

As we transition into a new normal which has no endpoint until a vaccine is found, our sailing capacity will be restricted if indeed we can sail at all.

We need to consider the loss of potential income, the duration of loss and the time required to ramp back up to a new and improved sailing program.

Previous financial reports indicate our annual costs are in the vicinity of 50 – 70K per annum.

Previous reports indicate our average earning capacity is 25 – 35K per annum.

Funding of 210K over a five year period will be made available from Devonport City Council as financial support for the business.

50K will be released to the company in our first financial year 2020/21 of which 10K is budgeted for start-up costs.

Proposed new income streams will come from membership, sponsorship, grants, donations, sail training courses and a new and improved sailing program.

A reduction in annual costs can be achieved by sourcing sponsorship in kind and having the Julie Burgess revalued in order to perhaps reduce the insurance premium.