National Disability Insurance Scheme self-managed plans Family Advocacy survey

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Background

The Family Advocacy conducted a self-management survey in 2020 to highlight people's priorities for support and workshops about how to self-manage support. They collected data from 90 respondents. The respondents were National Disability Insurance Scheme (NDIS) participants and people who support NDIS participants who are either currently, partially, considering or no longer self-managing a NDIS plan. The survey included four closed questions and ten open questions. The questions included why participants self-manage, positive factors and challenges as well as what additional knowledge, skills and resources participants would like to help them with self-managing. The report aims to identify common barriers experienced by NDIS participants who self-manage as well as offering suggestions and solutions to improve and encourage self-management.

Survey analysis

The analysis organised the responses to each question by key themes, summarised in the first table. The remaining tables are ordered by question. Responses that did not fit in a theme or did not answer the question were labelled as 'other'. Solutions tables are also added to some questions with examples of what participants already do to help them self-manage. The suggestions tables are what participants would like to see happen.

The Appendix includes a glossary and summary of how the key themes were defined, including examples of participant responses grouped in a theme.

Findings

Survey respondents said that self-management gives participants choice, flexibility, control, a chance to work with non-NDIS registered providers and the ability to efficiently manage staff and costs involved.

They said the common barriers to self-management are that it is time consuming, NDIA and LACs are often inconsistent, and participants struggle when navigating administration tasks. Other barriers are a lack of technology and budget/recording skills and limited understanding of staff requirements. They highlighted an overall lack of information from NDIS to self-managers across all areas of self-management.

The respondents said they found it useful to attend workshops/training courses, hire third parties, set up excel spreadsheets, keep copies of records and use online networks to recruit staff.

Their suggestions to overcome common barriers to self-managing were to improve and update the NDIS MyPortal, attend training seminars to develop skills and knowledge, access peer support groups, develop local databases and receive support from NDIS staff.

Tables

Table 1 is a summary of all responses, by question and by theme. The question numbers are in the columns and the key themes are in the rows.
The themes are grouped into 2 response categories
- Benefits of self-management
- Barriers to effective self-management

The glossary at the end of this report has definitions of key themes.

Table 1 Summary of findings

	Number of responses by question									
	Q3	Q4	Q5	Q6	Q7	Q8	Q9	Q11	Q12	Total
Benefits of self-management										
Flexibility of services	12	12								24
Choice	12	12								24
Control	12	12								24
Efficiency managing people and costs	12	12								24
Choice and control	11	11								22
Flexibility and control	6	6								12
Working with non-NDIS registered providers	4	4								8
Flexibility and choice of services	4	4								8
Choice, flexibility and control	3	3								6
Barriers to self-management										
Time consuming			15	7	13	4				39
NDIA or LAC inconsistencies			11	24	3	2				40
Finding/dealing with service providers			10	5	4					19
Easy access to information			9						3	12
Managing responsibilities			9							9
Navigating administration tasks			8	21	9			3	7	48
Planning and decision making			8	7						15
Lack of NDIS support for parents/carers			7	5						12
Bureaucracy/Red Tape			5	4						9
Planning for the next review			2							2
Lack of information				31	19	12		4		66

	Number of responses by question									
	Q3	Q4	Q5	Q6	Q7	Q8	Q9	Q11	Q12	Total
Budget/record keeping					26	9				35
Technology skills					9			2	8	19
Outages and slow portal						5				5
Software issues						5				5
Set up of service data calendar is not user friendly						3				3
Human resource (HR) requirements							27	5	5	37
Recruitment assistance							15	6	4	25
Training support workers							4			4
Knowledge about what is available for self-managers							4	8		**12**
Information on employment							2			**2**
Management skills								9	9	**18**
Knowledge from other service users								7	8	**15**
Self-management training/workshop resources								6	15	**21**
Interpersonal skills								6	5	**11**
Knowledge about what is involved with self-managing								6	6	**12**
Access local databases about service providers									6	**6**
Flexible funding for self-managers to use where needed									4	**4**
Support for self-managers									3	**3**
Self-management guide / template for participants									3	**3**
Everything							7			**7**
Nothing			9	7	29	19	20	17	3	**104**
Other	11	11	2	10	6	2	5	11	9	**67**
Total	**87**	**87**	**95**	**121**	**118**	**61**	**84**	**90**	**98**	

Notes: Column titles are the question numbers in the survey. Each cell is the number of respondents who reported the theme. See the glossary at the end of this report for definitions of key themes.

Question 1: Please select a statement that reflects your current situation:

Answer choice	Responses	
I am currently self-managing NDIS supports	80.00%	72
I am considering self-managing NDIS supports	11.11%	10
I am self-managing part of an NDIS support package	3.33%	3
I was but I am no longer self-managing NDIS supports	5.56%	5
Total answers		**90**

Question 2: Please select a statement that is true of you:

	Responses	
I am a person with disability	8.89%	8
I am a family member of a person with disability	88.89%	80
I am a supporter of a person with disability	2.22%	2
Other (please specify)	0.00%	0
Total answers		**90**

Question 3: Why do you self-manage or want to self-manage NDIS supports?

Key Themes	Responses
Flexibility of services	12
Choice	12
Control	12
Efficiency with managing people and costs	12
Choice and Control	11
Other	11
Flexibility and control	6
Working with non-NDIS registered providers	4
Flexibility and choice of services	4
Choice, Flexibility and Control	3
No answer	3
Total answers	**87**

Solutions	Responses
"Resourcing Inclusive Communities is developing a one-day workshop and a series of webinars to help people get started with self-managing their disability supports through the NDIS".	1
Suggestions	
"A simpler system for processing invoices needs to be developed as well as better IT system separate to the old Centrelink system".	1

Question 4: What do you think are the positive factors of self-managing NDIS supports?

Key Themes	Responses
Flexibility of services	12
Choice	12
Control	12
Efficiency with managing people and costs	12
Choice and Control	11
Other	11
Flexibility and control	6
Flexibility and choice of services	4
Working with non-NDIS registered providers	4
Choice, Flexibility and Control	3
No answer	2
Total answers	**88**

Question 5: What are the most difficult things about self-managing NDIS supports?

Key Themes	Responses
Time consuming	15
NDIA or LAC inconsistencies	11
Finding/dealing with service providers	10
Finding information	9
Managing responsibilities	9
Nothing	9
Navigating administration tasks	8
Planning and decision making	8
Lack of NDIS support for parents/carers	7
Bureaucracy/Red Tape	5
Planning for the next review	2
Other	2
No answer	4
Total answers	**86**

Solutions	Responses
Employ a plan manager	1

Question 6: What do you think are the barriers within the system that make it difficult to self-manage NDIS supports?

Key Themes	Responses
Lack of Information	31
NDIA or LAC inconsistences	24
Navigating administration tasks	21
Other	10
Time consuming	7
Planning and decision making	7
Nothing	7
Finding/dealing with service providers	5
Lack of NDIS support for parents/carers	5
Bureaucracy/Red Tape	4
No answer	4
Total answers	**86**

Suggestions	Responses
"Would like to see more participants [of NDIS] directly employ [staff]".	1
"It would be great if you could set up the details of your supports in the system and categorise them as either capacity building or core supports and simply select them from a drop down menu when submitting a request for payment".	1
Need simple online training when first registering	1

Question 7: What challenges you about managing the support budget or keeping financial records?

Key Themes	Responses
Nothing	29
Budget/record keeping	26
Lack of Information	19
Time consuming	13
Navigating administration tasks	9
Technology skills	9
Other	6
Finding/dealing with service providers	4
NDIA or LAC inconsistences	3
No answer	3
Total answers	**87**

Solutions	Responses
Set up an Excel spreadsheet for spending and wages	5
Third party support e.g. support coordinator, plan manager, admin/book keeper	3
Setting up systems e.g. cashbook, recruitment master, filing system	2
Keeping hard copies of records	2
Keeping digital copies of records	2
My Place portal is helpful to find out where money is needed, where money is going well and rejected claims from providers	1
"I have a float in my budget… I can pay bills as they arrive but claim from NDIS once a fortnight".	1
Total answers	**16**

Suggestions	Responses
Need a set of guidelines and instructions for self-managing	3
Hire a bookkeeper	2
Learn skills to set up spreadsheets	2
Invoice service providers in advance	1
Allocate self-managers an agreed amount of money to be spent wherever they feel is needed and allow them to receive additional money by justifying with receipts.	1
Receive administration support	1
NDIA could enable debit/credit payment options for core funding	1
"Would like to be able to download paid supports so I can manipulate in my own spreadsheet instead of cutting and pasting from the portal".	1
"Training and support [for budget and recording keeping]".	1
Total answers	**13**

Question 8: What difficulties do you have when using the NDIS Portal?

Key Themes	Responses
Nothing	19
Lack of Information available	12
Unclear budget/record display	9
Outages and slow portal	5
Software issues	5
Using portal is time consuming	4
Setup of service date calendar is not user friendly	3
NDIA or LAC inconsistencies	2
Other	2
No answer	6
Total answers	**84**

Solutions	Responses
Employing someone to help	1
Contact LACs and ask for advice	1
"I go into the NDIS portal, have the payment requests and then I print off my purchase report every month and then I go into my plan".	1
Total answers	**3**

Suggestions	Responses
The portal could show the amount left in the account.	2
Update Payments requests to appear from most recent to oldest in the portal.	1
More information on where funding is spent	1

"Have a drop-down tab [in portal]".	1
"I act on behalf of my son and I do not have any diagnosed disability; Given this, it would be simpler if I was taken straight to my sons "MyPlace" to submit a payment request".	1
Total answers	**8**

Question 9: What would you like to know more about to help with recruiting, training and managing your own staff?

Key Themes	Responses
HR requirements	27
Nothing	20
Recruitment assistance	15
Everything	7
Other	5
Training Support Workers	4
Knowledge about what is available for self-managers	4
Information on employment	2
No answer	12
Total answers	**78**

Solutions	Responses
'Hireup' online network	2
Teaching service providers how to recruit/train staff	1
Mental health first aid course for support staff	1
Total answers	**3**

Suggestions	Responses
Access to a local self-manager support group	5
Training/recruitment support	4
"An accounts program specific for Self-Management of NDIS funding instead of having to use "business accounting programs i.e. MYOB".	1
Recruit service providers through 'Hireup', an online network platform.	1

Teach the NDIS about self-managing	1
HR support	1
Total answers	**9**

Question 10: Do you think you need help with planning how to utilise supports to create a meaningful daily life?

	Responses	
Yes	46.59%	41
No	53.41%	47
No answer		2
Total answers		**88**

Question 11: What skills, knowledge or training would you like to have to help you begin to self-manage or get better at it?

Key Themes/suggestions	Responses
Nothing	17
Other	11
Management skills	9
Knowledge about what is available for self-managers	8
Knowledge from other self-managers	7
Self-management training/workshops	6
Recruitment assistance	6
Interpersonal skills	6
Knowledge about what is involved with self-management	6
Knowledge of HR requirements	5
Clearer understanding of NDIS terminology and descriptions	4
Help with navigating portal	3
Technology skills	2
No answer	11
Total answers	**79**

Solutions	Responses
"Workshop sessions offered at Aspire [Disability support service]".	1
Total answers	**1**

Question 12: What other supports, resources or training do you think could be provided to enable more people to self-manage NDIS supports or improve their experience of it?

Key Themes/suggestions	Responses
Training/workshop on self-management	15
Management skills	9
Other	9
Technology skills	8
Knowledge from other service users	8
Support with navigating administration tasks	7
Knowledge about what is involved with self-management	6
Access to local databases about service providers	6
Support developing interpersonal skills	5
Knowledge of HR requirements	5
Recruitment assistance	4
Flexible funding for self-managers to use where needed	4
Support for self-managers	3
Easy access to information	3
Self-management guide/template	3
Nothing	3
No answer	18
Total answers	**72**

Solutions	Responses
"Workshops where you can discuss providers in different areas, sharing experiences, new NDIS rules on charges etc."	1

"I have made an app that collects the [information] I need and automatically puts it onto a spreadsheet…"	1
Total answers	**2**

Question 13: Would you be interested to take part in a one-day workshop or webinar series held by Resourcing Inclusive Communities about self– managing supports?

	Responses	
Yes	82.35%	70
No	17.65%	15
No answer		5
Total answers		**85**

Question 14: Please share any other comments you have on this issue:

Key Themes	Responses
Other	10
Cynical about NDIS	6
NDIS needs to be more accessible for people	5
NDIS is doing a good job	5
Self-managing is easy	4
Hard to self-manage with multiple commitments	4
Unsatisfactory planning reviews	4
Great survey	4
More training and workshops are needed	3
Nothing	3
NDIA or LAC inconsistency	2
Need information about how to avoid mistakes	2
Need clearer information	2
No answer	48
Total answers	**42**

Solutions	Responses
Self-management peer support group	1
Suggestion	
"Workshops in Armidale"	1

Appendix: Glossary and explanation of key themes

Key Themes: Common ideas found from the survey respondents answers to questions.

Responses: The participants answer to the survey question.

Solutions: What the survey respondents are doing to overcome barriers with self-management.

Suggestions: What the survey respondents would like to do to overcome barriers with self-management.

Key themes	Responses that were grouped under the theme
Flexibility	Flexibility of services, freedom to employ, use funding where respondent want, negotiate pricing.
Choice	Freedom to choose services, Independent decision making, manage allocated budget.
Control	Control over services, support, billing, spending plan and reviewing budgets, no reliance on third parties
Efficiency with managing people and costs	Funding is granted, saves money, stretches money further, directly employ and sight invoices
Working with non-NDIS registered providers	Access support from non-registered NDIS providers, private providers.
Time consuming	Time constraints, commitments.
NDIA or LAC inconsistences	National Disability Insurance Agency (NDIA) causing difficulties, Local Area Coordinators (LAC) inconsistencies, constantly changing decisions.
Finding/dealing with service providers	Finding quality services, accessing service providers, hiring support workers, waiting for invoices.
Managing responsibilities	Managing multiple responsibilities at once, keeping up to date and on track with tasks.

Navigating administration tasks	Navigating NDIS portal, vague descriptions in the portal, setting up systems to monitor budget and funds, teach service providers how to invoice, filling out paperwork.
Planning and decision making	Using funds wisely, claiming correct supports, who is responsible for decision making.
Lack of NDIS support for parents/carers	Under supported, concerns who will care for people with disabilities after their death, stress in old age, finding service is difficult.
Bureaucracy/Red Tape	Interference of LAC challenging decisions, NDIS changing requirements to self-management, wanting control over payment requests.
Planning for the next review	Appropriate evidence to support the review for the next plan, difficulties getting support at review time.
Lack of information	Cannot find information, confused, requires a clearer understanding of NDIS terminology and descriptions.
Budget/record keeping	Claiming from correct bucket of money, spending budget appropriately, maintaining financial records, lack of financial and record keeping training. Unclear budget/record display, Portal does not show how much balance is left in each category, outdated payment request section, inconsistent budget page and payment request section.
Technology skills	Computer skills, spreadsheets, emails, uploading documents, IT skills, excel, navigating the portal.
Outages and slow portal	Problems with outages, problems during transitions between plans, slow, when portal is down self-managers cannot pay staff.
Software issues	MyGov security does not allow two people to share reporting activities, rejection status and coding is similar, you have to go out and back into the portal to upload documents, do not always have internet access.
Set up of service data calendar is not user friendly	Cannot scroll or move pop-up calendar as it does not appear completely, the service date calendar function in the claims area is not helpful.

Human Resource (HR) requirements	Tax, super, insurance, legal requirements, credentials, rights and obligations, Human resource skills.
Recruitment assistance	Support with recruiting, qualification and experience requirements, Hireup online network program.
Training support workers	How to train staff to support people with disabilities, courses to offer staff.
Knowledge about what is available for self-managers	What is available in local areas, online resources, setting up companies, how to find recommendations, creative ways to use NDIS funding for core support funds, more information available to participants so that they know what is possible/available, insight into the price catalogue.
Information on employment	clearer information about how and where you can employ your own support workers.
Management skills	People management, budgeting, pay and claim, accounting skills, business management.
Knowledge from other service users	Sharing experiences with others, hear stories from other families about how their Participants are utilising their NDIS plans, support groups.
Self-management training/workshop resources	Training sessions, workshops, introductory seminars.
Interpersonal skills	Assertiveness, confidence, self-advocacy.
Knowledge about what is involved with self-managing	What details are involved in Self-Management, step by step of how to do it, creative ways to get the best out of self-management, what is required to bring to a planning meeting. Information on different models of self-management, how to make decisions about funding, examples of successful self-management in a variety of situations and disabilities.
Access local databases about service providers	Could include list of service providers, activities, programs, sporting and recreational groups, different models of self – management.
Flexible funding for self-managers to use where needed	Use NDIS funds on other services, allowance for IT, funding for management of supports and assistance.

Support for self-managers	Support for Carers who Self Manage on behalf of their participant, support self-managers with notetaking resources during workshops, provide more information to carers on community supports and resources or training.
Easy access to information	More easily accessible and simply worded documentation, easier to find history of claims submitted.
Self-management guide / template for participants	More detailed self-management guide given to participants, a master template for financial management and mini business plan.
Everything	Everything
Nothing	Nil, n/a, nothing, not sure
Other	Other responses which were not common across the data or did not answer the question.