Transcript

National Disability Insurance Agency

National Disability Insurance Scheme (NDIS)  
Self-management webinar

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**Presented by:**

**Matt Wright**

Branch Manager, Engagement and Inclusion, NDIA

**Welcome to Country:**

Cheyne Halloran

**Panellists:**

Sam Bennett  
General Manager, Advisors and Research Division, NDIA

Marita Walker  
Strategic Advisor, Self Management, NDIA

**Kristie McCarthy**NDIS Participant

**Jan Kruger**Parent of NDIS Participant

[*Opening visual of slide with text saying ‘National Disability Insurance Scheme (NDIS)’, ‘Self-management webinar’, ‘ndis’, ‘Delivered by the National Disability Insurance Agency’*]

[*The visuals during this webinar are of the presenter and panellists seated on stage, speaking with reference to the content of a PowerPoint presentation being played on a large background screen, and an Auslan interpreter doing sign language in the top left of the screen*]

**Matt Wright:**

Hello, and welcome to the National Disability Insurance Agency’s self-management webinar. I’m Matt Wright. I’m the Branch Manager of National Engagement, Strategy and Support. I’m deaf and using technology to be part of today’s proceedings.

I’d like to extend a warm welcome to you all, and hope that you will join us by submitting online questions and comments. Shortly you’ll meet our expert panel, but first I would like to introduce Cheyne Halloran to do the Welcome to Country. Thank you Cheyne.

**Cheyne Halloran:**

Thank you.

On behalf of my Elders I say [0:00:48 Aboriginal language being spoken]. Hello and welcome. Today we are all here on Ngunnawal country. Firstly I acknowledge my ancestors and my Elders, the Ngunnawal people, in particular the United Ngunnawal Elders Council who are the traditional custodians of the region encompassing Canberra, the ACT and surrounds.

The United Ngunnawal Elders Council are made up of representatives of the core families of the Ngunnawal people and actively work to preserve Ngunnawal culture and heritage. They endeavour to ensure that Ngunnawal and other Aboriginal people living here on Ngunnawal land will have access and opportunity to important things like education, health, housing and access to services and advocacy for those who don’t always have the means or experience to do so for themselves.

Our ancestors invited and welcomed our tribal neighbours to what is now known as Canberra to trade and participate in ceremonies, including sustaining law, culture and the sharing of knowledge.

The Ngunnawal people pay our respects to our traditional neighbours, the Gundungurra to the north east, the Walgalu to the south, the Wiradjuri to the west, the Yuin to the east and the Ngarigo to the south-east. We know that Welcome to Country is an ancient Aboriginal protocol that ensures that once welcomed your spirit is protected whilst on another’s land.

We call on our ancestors to protect your spirits whilst you are here on Ngunnawal country.

In the community that I was raised, like many our solutions brokers and knowledge base have typically been our Elders. We approach and discuss our toughest issues with them, not because they claim to have the answer for every problem, but because they help guide us to a place of clarity.

On behalf of my Ngunnawal Elders, again I welcome you to Ngunnawal country. Thank you.

**Matt Wright:**

Thank you Cheyne. It’s also great to have two Auslan interpreters here today ensuring that many people from my community will not miss out. Thank you.

So let’s get the discussion started. We’re very fortunate to have Dr Sam Bennett, the General Manager of Advisors and Research at the National Disability Insurance Agency. Sam was the head of integrated personal commissioning at the National Health Services in England, and Sam led *Think Local, Act Personal*, in which 55 people with disability organisations and government collaborated to write the rules on self-management in the UK.

Also on our panel is Marita Walker, Branch Manager, Scheme Innovation at the NDIA. Marita has a long history in the disability sector, and prior to coming to the NDIA Marita was the CEO of Aviva, an organisation that worked with people with disability who had individualised funding.

We also have two people who know about self-management from firsthand experience; Kristie McCarthy, an NDIS participant who self-manages her funds, and Jan Kruger, the mother of Jack, a 16 year old NDIS participant, and they are self-managing.

Welcome all. Sam, I’d like to start with you.

**Sam Bennett:**

Thanks Matt.

**Matt Wright:**

Critics say that self-management has never been done before, and the bottom line is that people with disability just can’t be trusted managing large amounts of money.

**Sam Bennett:**

Well first up I just want to say that of course people with disability can be trusted. The NDIS is all about enabling people with a disability, families, carers, to have more choice and control over the important things in their lives and over the important decisions around the services and supports that they need to be able to meet the goals in their plans.

And it won’t be for everybody, but we know that an increasing number of participants – it goes up every quarter – are making the choice to self-manage their NDIS funding. And they’re doing that because of the extra flexibility that it affords them. They’re doing that because of the wider range of options that it opens up. And they’re doing that because it puts them in control of their own destiny. And far from being a new idea and something whacky, if you look across the world really at major disability reforms that have happened in a number of countries over the last several decades, you’ll find that self-management, often by another name but very much the same concept, has been at the heart of many of those changes.

And the system I’m most familiar with from my career until very recently is in England where we’ve had a model of self-management enshrined in legislation since the early 1990s. It has its roots in the independent living movement and government’s recognition of the social model of disability. And over a number of years subsequently, many more people have been taking up that opportunity. So we now have in England upwards of 40 percent of people with disability of working age that are self-managing their funds. Many more people, children, young people, people with mental health problems also are benefiting from that model as well.

And our own independent advisory council has been central in bringing that experience to our attention and to exhorting us as an agency to aim higher in terms of our approach to self-management under the NDIS. It’s a very simple premise that people with disability with the right support, as the experts in their own lives, can make great, well-informed, creative, cost-effective decisions about the use of resources. It’s quite hard to match through some more conventional service solutions, and there’s lots of evidence to back that up in terms of when implemented well, self-management leads to good outcomes for people.

So you don’t have to take my word for that, because we’ve got some real experts on the panel today that can bring that to life better than I ever could.

**Matt Wright:**

And you’re right about the independent advisory council leading this process, and they are critical disability leaders from across the country aren’t they Sam?

**Sam Bennett:**

They are indeed, and they put some advice up to the Board of the NDIA in the summer of last year – it will be available I believe on our website shortly – which was lots of advice around how we need to work as a scheme and as an agency to put people in the driving seat through our approaches to self-management.

**Matt Wright:**

Terrific. Now that’s the overseas experience. Marita, we’re not in the UK here, and this kind of radical thinking just wouldn’t work here right?

**Marita Walker:**

Well it already has, and in most jurisdictions across the country there’s been some program or some opportunity that those people who’ve agitated hard have had experience of, again, not necessarily called self-management, but of having direct control of the funds that their disability supports require. And they’ve been developing their options and working out how to do it.

In WA where I come from, we’ve had individualised funding for decades, and that has enabled people to be aware of what their resources are and to have the option of choosing to work with an agency in partnership and taking a significant amount of responsibility, as much as they want, to have direct control of their funds, to go as far as directly employing participants, directly employing people to provide their support. And so I have seen that work in a very powerful and positive way to enable and promote and have great outcomes and people living ordinary lives.

**Matt Wright:**

Terrific. Now Kristie I’d like to bring you into the conversation here. You previously had to book your services through a service provider, and now you do it yourself. Can you tell us about the difference?

**Kristie McCarthy:**

It’s an absolutely huge difference. So as much as my service providers gave me quite good service, it just wasn’t always as flexible as I needed. Sometimes there would be critical times where they just didn’t have staff, and when I directly employed my own staff, I could have those conversations with my staff to say ‘Look, can I have someone on Friday night?’ ‘Look, I’m really busy Friday night. Everyone seems to be a bit busy Friday night’. But we can have that conversation and say ‘Maybe if I shower a little bit earlier or do this’ – we make those sort of arrangements, and it just works out so much better, and rarely do I have gaps in my services. It’s such a great way to do it.

**Matt Wright:**

That’s fabulous. And what are some of the things that you are doing now that you’re self-managing?

**Kristie McCarthy:**

So in my life I am a very, very busy person. I go to university. I’m currently studying food and nutrition. And I do that distance, but I need support workers to be able to actually take me to Wagga when I have residential school. I’ve also started a business with two colleagues who also have a disability, and we are helping other people to self-manage their funds, just empowering their lives as well. And my support workers help me with that. They help take me to work. I wouldn’t have those sort of opportunities otherwise.

I also play wheelchair sports. Well, I’m a semi-retired soccer player, but I don’t think I’ll ever really fully retire. I’m on the board of directors for both the Australian and New South Wales leagues, and have as much as an active social life as possible when I find time. I just don’t have a lot of time left between those things, but very busy. Yeah.

**Matt Wright:**

And Kristie, you’ve been on a couple of cruises as well?

**Kristie McCarthy:**

Of course. Yes. Yes, I have. I have been on a couple of cruises. December last year was a really great cruise. I went to New Zealand, and my support worker who I have with me today, she was able to assist me. She came on the cruise with me and helped me with things like getting out of bed, just taking me up to the bar, helping me have a drink. And it was fantastic. Such an amazing opportunity. Yeah. But I’m a loyalty cruise person. This is probably I think about my sixth cruise now, so I’m a return. P&O, would you like to - - -

**Matt Wright:**

Great. Thank you. Jan, I’d like to bring you into the conversation and talk about your son Jack as well. Jan, people often start a conversation with you about your son’s needs or a deficit, but it’s really the wrong place to start isn’t it? Tell us about your son.

**Jan Kruger:**

I think it’s been welcomed that we can actually start talking about our sons’ and daughters’ strengths rather than starting with deficits where we almost get conditioned. When Jack was born, we were almost conditioned to only look at all the things that were wrong with him and what we needed to fix. But we never sort of took that up. And Jack is one of my four children. So my husband and I have three girls and Jack. And he’s a vivacious young man. He’s got the same aspirations as his sisters, and he’s now currently looking for paid employment at the age of 16. He’s a downhill skier, he’s a soccer player, he’s a soccer referee on the weekends, which is a paid gig. He’s loving that. Cash in hand.

He's very warm and welcoming and quite determined to live an ordinary life, and then that’s where the support comes in. So he’s got the same aspirations around work, living in his own home, probably with some uni students when he leaves home, getting married, having children.

**Matt Wright:**

Terrific. So we might just go to a quick video about Jack.

[Start video playback]

**Jack:**

Hi. My name’s Jack. I’m 16. I ride my bike. I like soccer. I do soccer reffing. Yeah, I learnt soccer skills with Alfonzo. I’ve learnt skills with Julia, new skills to get a job. My boss’ name is Zeb. I help him. I help people.

I have a lawn-mowing business with my cousin.

The future? Be a businessman.

Have my own home.

[End video playback]

**Matt Wright:**

Fabulous. Jan, can you tell us how self-management has helped with some of those wonderful things that you outlined before that you’ve done?

**Jan Kruger:**

Yeah. Look, Jack didn’t actually access any services prior to the NDIS, because what they were offering often would take Jack out of his community or away from the family. So we really welcomed the NDIS and being able to self-manage the funding, because it enabled us to have more control over who the people were that were going to be in his life in a paid capacity, when they were going to be in his life and how. So it’s been really great to be able to build that relationship with support staff that we’ve then been able to directly employ, and he’s achieved some amazing goals because we’ve had that really clear vision of what he wanted to achieve, and the NDIS is just part of that equation.

**Matt Wright:**

And you were talking with me earlier about the fact that Jack was really interested in soccer and he was having a little bit of a struggle in the skills component, so you brought in Alfonzo, a soccer coach, and he helped Jack to pick up some of those skills. And so would it be right to say that you’ve employed people at the right time to bring the skill that Jack’s needed just for that moment?

**Jan Kruger:**

Yep. Look, we really wanted a sports coach that could enable Jack to learn how to ride a bike, even though his father taught him. But it was the practice that was needed, and so he would often practice going to the gym – so it was always with a purpose – to soccer training, to the local shops. And with the soccer coaching, Alfonzo wasn’t there all the time, but we noticed in training Jack would pull himself away from the group at certain times of the training session. So we were a bit perplexed by this, and it would have been easy to assume that maybe he just doesn’t want to play soccer anymore, but it wasn’t that. It was that it was a particular time and it was the skills session.

So we found out from the coach what skills were going to be performed in the upcoming training, and Alfonzo would practice that with Jack at home. So then when Jack went to training he was the demonstrator, and it managed to keep him engaged with the whole training. So it was really lovely to be able to have Alfonzo in our life to be able to do that with Jack, so it was a fabulous outcome.

**Matt Wright:**

Terrific. Alright. We might now go to some questions from our online audience.

Alright. We’re now going to move on. Marita, I think our audience will want to know how do I do this? What are the steps that I need to take to self-manage my NDIS funds?

**Marita Walker:**

Okay. Well I’m very pleased to announce that we have a new resource that will enable you to get a good amount of the information that you will need to undertake self-management. So our self-management guide is now available on the NDIS website, and you can download it and then the sorts of things that are in it are about what are the benefits of self-management and how do I go about it, what support can I have to do that, what are the ways in which I can engage my supports or purchase my supports, how do I need to think about those supports in terms of the goals that I have in my plan and how they’ll be achieved, and how do I make a payment request through the myGov portal for that funding to be made available so that I can pay for those supports that I’ve purchased?

And what are my responsibilities as a self-manager? And they will vary, depending on whether you opt to be an employer or whether you purchase from other sorts of suppliers.

So there’s a wide range of useful information in the guide, and I encourage people to have a look at that from the website, and also to note that there will be hard copies of the guide that will be available from NDIA regional offices, from partners in the community, or if you call the Contact Centre and request a copy, then a guide can be mailed out to you. So we acknowledge that this is information that has been very long awaited, eagerly awaited, and so we’re very pleased to acknowledge that it’s now here.

But we also don’t want to give the impression that this will answer all your questions, and in fact many of the best answers and best guidance and best coaching that you might have about how to start self-management or how to make good decisions about how to achieve your goals, Kristie and Jan on our panel, they represent peer support and organisations that are available in most places in Australia if you look around. And so I want to encourage people to think about asking others who are doing it already, as they are going to be a really, really rich and valuable source of advice about self-management.

**Matt Wright:**

Thank you. We might just come back to our online questions. So the first question comes in from Michelle.

*Q: What are the benchmarks used to determine approval for self-management?*

Marita, I might go back to you on that question.

**Marita Walker:**

Okay. So there is some specification in our legislation about there being a decision made for approval, as Michelle’s indicated. So first of all that is part of the process of having a discussion and developing your plan. So the specific things that mean that you won’t be able to self-manage are if there is a current insolvency question. That you are currently insolvent is an automatic no. Generally people whose income is managed in some other way through a public trust or the equivalent in other jurisdictions – it may have different names – then that is generally seen as an unreasonable risk.

But there are other sorts of circumstances that will be discussed with you at the time of developing your plan that may mean that there might be a risk recognised and then some supports put in place to ensure that that risk can be mitigated to be able to give approval to self-management. So it is part of the plan, and in the guide there is some further information about that.

**Matt Wright:**

So it’s fair to say that most people would qualify. We might go to our next question.

This comes from Maree.

*Q: We have a very positive experience with the NDIS so far for our 18 year old son in our first plan which is coming to an end this month, and we’ve found self-management has been great. I’ve heard there is pressure to move people away from self-management. Is that true or just a rumour? I hope it’s just a rumour.*

Sam?

**Sam Bennett:**

And very happy to refute that Maree and to say that absolutely we’re not looking to move people away from self-management. The NDIA remains committed to ensuring that self-management can be a viable, a positive and a safe choice for as many participants as want to make that. And as I alluded to in my opening remarks, we’ve seen the number of people that are taking that choice up is rising sort of every quarter.

And the benefits are significant, so absolutely I think there’s a rumour there that we need to squash. There’s no substance to that.

**Matt Wright:**

Great. Thank you Sam. Yeah. I think there would be a lot of people with disability in families out there saying ‘How do I get started?’ So Kristie first and then Jan, could you just give us a little bit of an explanation about how you got it going?

**Kristie McCarthy:**

Well I was lucky enough to have a little bit of experience pre-NDIS. I was self-managing my funds through the state funding that I had, so I did have a little bit of experience. The process was a little bit different, not as much hourly reporting, where with my old system it was a lot about hourly reporting. But this one I have my budget, I basically allocate what I need. So when I went on my cruise, I of course had to allocate a lot more of my budget to my supports while I was on the cruise. But then I’ve just allocated my supports throughout the year, and it’s just going on, getting a payment request. I directly employ my staff as well, so that’s a little bit different. I don’t mind service providers. I think they’re the backbone of the industry. But I prefer my way. But that might not work for everyone, and I understand that.

**Matt Wright:**

And that’s not always been an easy process. Sometimes you’ve had to get advice on tricky staff management issues.

**Kristie McCarthy:**

Absolutely. I have had some incidents with some staff, and yeah, it’s difficult sometimes firing someone that’s not appropriate. I had some good advice, and if I didn’t have these people to give me advice in my life it would have been a lot more difficult. But it’s just about having those communication skills, and being able to have those conversations when someone’s not doing something properly for you, to be able to tell them ‘That’s not how I like it being done’. Ultimately you’re the boss. You get to call the shots. So it’s not as difficult as people think.

**Matt Wright:**

Terrific. And Jan, what were the first couple of steps for you?

**Jan Kruger:**

I’ve got to cast my memory back, because it was a few years ago now. But we were quite nervous about it, because it was quite unknown. We hadn’t self-managed any funding before. But we have run a business, so I sort of thought you know, surely we can do this. There wasn’t a lot of information out there, but we thought we’d give it a go.

So it was a bit of process stuff around having a myGov account so you can access the portal online, setting up a bank account for Jack so then the funding can be transferred into his account so then we can pay his support workers or other things that we’ve purchased. So it did feel a little bit overwhelming at first, but we just went step by step. And it was quite a bit of work, but my husband and I shared that role in getting set up, and I think that’s what takes the time. Once you’re set up and you familiarise yourself with the portal and you’ve got your system set up in keeping invoices and receipts, then it’s sort of smooth sailing from there.

I mean yes, you get a few challenges along the way, but I think you would get that in any way that you use your funding, whether it’s agency managed or self-managed or plan managed.

**Kristie McCarthy:**

Can I just say as well, as much as it’s a process, once it’s set up it takes me approximately half an hour a fortnight to run my process. It’s not a huge burden out of my life. Once it’s set up, it’s just smooth running.

**Sam Bennett:**

Can I just say Matt I find that so encouraging. And Marita was referring to this earlier, but really the most powerful way of learning how to self-manage is from people that are doing it. And you’ve just made it sound so simple and straightforward, albeit with some hurdles along the way. But you’ve overcome those clearly.

**Kristie McCarthy:**

Our best resources are our peers. They’re the ones that have taught me the most.

**Jan Kruger:**

Absolutely. And just going back to that question before around self-managing, I think sometimes you may come across a planner that might have their own personal opinion whether self-managing is easy or not. So my advice would be just to stand strong, that this is something that you feel like you want to try and have a go at. And I know that the NDIA are supportive of it, so give it a go.

**Sam Bennett:**

Another way into that is that you can partially self-manage as well as fully self-manage. So I think as a stepping stone towards full self-management or as just a decision in its own right, there are ways that you can test the water I think and get more confident about it that will lead to that outcome eventually.

**Marita Walker:**

One of the most common components where people dip their toe in the water is their community participation, so things that they’re going to try out in the community. It’s great to do that with someone who shares that interest, not whichever support worker happens to be rostered that day.

**Kristie McCarthy:**

Somebody that’s your age and has the same interests. Absolutely.

**Matt Wright:**

And Jan, on community participation, I was reflecting on your story before and you’ve done some amazing things with Jack in terms of the soccer and setting him up for work experience and jobs and the drama and other things that he’s done. But I wanted to make the point that parent guilt can be a big thing in disability, because even when parents have high aspirations, sometimes their children’s milestones can look very different. And I can imagine a lot of parents watching this and thinking ‘I’m already very tired from the additional therapies and supports and fighting against discrimination that I have to overcome’. So where can families start with this community inclusion and this approach that you’ve taken?

**Jan Kruger:**

And I totally get that, and I think that some people have been through some really wounding experiences. But I think the best way to counteract that is really start dreaming big and have a big vision for your family member regardless of what other people might think, and then to start taking one small step at a time in achieving one thing. So your son or daughter may not be in a regular school, but you can be doing something outside of the school system that might work towards them being a valued member of their community. So it could be joining a local club and getting a support worker that has that shared interest to help them get in the door and meet some people.

So I think it’s just about just taking it one step at a time, but by having a clear vision that gives you hope. And I think that that’s what we need to hold on to.

**Matt Wright:**

Fabulous. Thank you. And don’t forget that you can all join the conversation through questions for our panel using Live Chat. And we’ll now go to a number of the questions that have been submitted by our online audience.

So Thai Tenille has asked the question:

*Q: Is self-managing just basically like paying bills online, or is it far more complex?*

I might hand this over to Sam.

**Sam Bennett:**

I don’t think it needs to be complicated. I think perhaps sometimes we’ve made it more complicated than it needs to be, and the information we’ve made available for people up until this point hasn’t perhaps helped that. Talking to Jan before this, this is exactly how you described it actually in terms of saying that if you can do internet banking, then it’s not dissimilar.

I suppose it will be different for every individual. It depends on what sort of package you’re self-managing. If you’re employing your own staff, then clearly there are some additional things that need to be taken into account, and that’s not all straightforward, but there’s lots of support and information to make that easier.

So, yeah, I think the portal is very much like paying bills online. There are other aspects I think.

**Kristie McCarthy:**

Yeah. It basically is. I always say to people if you are successfully paying your mobile phone bill, you’ve got this. You’ll be able to do it. So you basically have an invoice, and that invoice has got to be paid. So to get the money for that you have to go on to the portal and make a payment request, and the money will be directed into your account. And then once that money is there, you can just pay that invoice. It’s pretty much as simple as that.

**Sam Bennett:**

I wonder if one of the difficult bits is less the complexity of it and more the sort of images of possibility, how you understand what different things you could do.

**Kristie McCarthy:**

Yeah. It’s all about knowing what reasonable and necessary is I guess. So there’s that component to it.

**Sam Bennett:**

Did you struggle to find the sorts of supports that you felt would work for you?

**Kristie McCarthy:**

Well, as I said, I do actually directly employ my support workers. So yeah, there are those little added complexities. It’s just basically going into your online accounting, running a pay run for the amount of hours that your support workers are with you, and again once you know how much it is, making a payment request and then being able to pay your employees. But yeah, it’s really not that much more.

**Matt Wright:**

Great. We might just go to our next question. Bronte asks:

*Q: How long did it take you to set up the best supports for Jack? We have two sons with ASD – which is autism spectrum disorder – and it takes ages (most of the plan period) to get the fit right.*

**Jan Kruger:**

Yeah. I mean when we first got Jack’s first plan, it took us a little while to get the courage and the knowhow to look for the right person. I think where we’ve found success is being really clear on what was the goal that we were trying to achieve for Jack and who would be the right fit for that. So we weren’t just getting one person to do everything. So Alfonzo was Jack’s sports coach, and we really wanted to work on his soccer skills, bike riding and becoming a gym member.

So, with that Bronte, we actually advertised. We sort of thought about okay, it’s a sports person, so where are we likely to find someone that’s got a passion or an interest in sport? So we looked at the university that was close by, we found out which building they were running physiotherapy or sports science degrees, so we put the posters up there. And we didn’t actually mention the fact that Jack had a disability. We just kept it very simple and just advertised for someone that was going to be a mentor in helping – he was 12 then – a 12 year old achieve some goals around bike riding and soccer skills.

And then we had a bit of a process where we could weed people out. So they would email us, we would send them an information pack, and that’s where we introduced that Jack happened to have a disability in amongst all these other attributes. And that sort of weeded a few people out. Interestingly the person that applied for it and who we met Alfonzo through, got that information pack, thought ‘I don’t think this job’s for me, but I think I know someone who would be interested,’ and that was Alfonzo. And he’s been with Jack for three years now.

And with Julia, she was actually a family friend, but she just had a really lovely rapport with Jack so we approached her. So there’s lots of different ways you can go about finding the right fit, but I get your pain, that it is getting that shared interest. And we actually weren’t looking for anyone with disability experience. In fact we were looking for the opposite, because we didn’t want them to come with preconceived ideas.

**Matt Wright:**

Jan, Bronte makes a really good point in terms of that relationship is critical, and you do want people to work with your son who are going to inspire your son to be part of the community and have that really strong relationship from start to finish.

**Kristie McCarthy:**

Can I just add something? The fact that she was able to do this not having to use a registered provider, that is a huge benefit of self-managing. You’re not restricted by registered providers. You can choose whoever you like. Yeah, it’s a fantastic way.

**Jan Kruger:**

And the relationships are core. Alfonzo has now got a full time job, but he’s still in Jack’s life in a freely given way. He’s joined Jack’s circle of support. And he’s just got engaged, and he’s inviting Jack to his wedding next year. So it goes to show that when you can self-manage the funding and build a really good relationship with supports, it comes back in other ways and they stick with you.

So I guess that would be my advice Bronte, is I know it can be tricky finding the right person, but think about what goals for each of your sons are you aiming for and look in the right place. So if we were looking for like a referee coach to mentor Jack, we would go to his local club, his local soccer club, because that would make sense.

**Matt Wright:**

Fabulous. We might go to our next question. Bianca asks:

*Q: There is a great deal of confusion about how to change from agency managed or plan managed to self-managed. Please clarify this for participants who already have a plan.*

So I might give this to Marita.

**Marita Walker:**

Yes. So the easiest point at which to do this is at your annual review. So plan duration has got a bit of variation. Some people have a shorter period than 12 months, and a small proportion of people will have a longer plan. But at the review is the simplest time to say that you would like to change the mix of management or to change your whole plan in terms of the management strategy.

Now it is possible to do that during the period of your plan, and that in more recent times has just become much easier than it was. It did previously require a full plan review, and that was slow and difficult. But now it is possible to change your type of plan management through what’s called a light touch review. So it’s a process of asking for a plan review but being very specific that it’s only about changing the method of management, and that in fairly recent times has become a quicker and easier thing to do.

**Matt Wright:**

Great. Thanks Marita. Next question. Amanda asks:

*Q: Can we employ a family member, say like the child’s uncle, to be used as a support worker as the child would trust him?*

Marita, I might ask you this one.

**Marita Walker:**

Yes. The employment of family members is an important question, and really appreciate Amanda that you’ve raised it. So our legislation is really clear that employment of family members is not something that we encourage, and that’s because relationships with family are really important for all of us, and to be a mother or a father or a brother or a sister, to be a grandmother or to be an uncle is really a connection to community that we all value as a freely given relationship. So employment of family members is not something that is allowed.

**Matt Wright:**

I could imagine that would lead to lots of complexity. So if you were in a situation where you had to performance manage a family member or withdraw services and the family was desperate for the income, that wold create lots of issues.

**Marita Walker:**

I should just make one addition to my definite answer. There are exceptional circumstances, and they require a justification and a transition plan about how that will be not continued in the longer term. So there are some circumstances because of the situation and the circumstances perhaps of the family and the location in the community where it is a short term transition arrangement that can occur.

But in terms of for children and having people support them who trust them, it does raise another question, which is that’s a really important issue to think about, and it is one of the responsibilities of self-managers that as you look for people you do need to make good, safe decisions about the people that you are engaging to support your family member.

**Matt Wright:**

Great. Thank you. We might go to our next question.

Catherine asks:

*Q: While waiting to change to self-manage, can you still employ your own support workers?*

Alright. I might throw this one to Sam.

**Marita Walker:**

I can do that.

**Sam Bennett:**

You go on Marita.

**Marita Walker:**

So the short answer is no, because you won’t be able to set up the myGov arrangements to be able to pay the people that you’ve employed.

**Jan Kruger:**

But start looking. Start before you get to that.

**Matt Wright:**

We might go to our next question.

Chantelle asks:

*Q: My planner has told me I cannot go on holidays with a carer despite it being in my goals. I self-manage my staff. Do NDIS pay for carer’s fee for the cruise? I’m not asking for my ticket, just the carer so I don’t have to pay double every time I want to go on holiday.*

**Kristie McCarthy:**

So this is a tricky one. This is an absolute tricky one. We weren’t able to pay for our ticket, but we made an arrangement with our support worker. So we had an amount that we would pay them while they were away, and they had time off while they were away as well if they chose to do that. It’s just an arrangement that you make with your support worker. Depending on whether they pay the ticket, you pay the ticket is just an arrangement between them and how much you choose to pay them out of your budget.

**Matt Wright:**

So the main thing here is you’re paying for the support for them on the cruise.

**Kristie McCarthy:**

Yes. But not the ticket. Yep.

**Matt Wright:**

Fabulous.

**Marita Walker:**

So this is really where the decision making and choice and control that you have of the funds that you’ve been allocated. So that is you take the role of making those choices and decisions and managing the budget. So you noted Kristie that you managed your budget over a year, and it means you’re spending more.

**Kristie McCarthy:**

All used in one. Yeah.

**Marita Walker:**

And that’s your goal. It’s not about somebody else deciding that you have a holiday or that you must – there’s no requirement for you to spend your funds on an even 12 month basis, but you make that decision within the budget that your plan allocates.

**Matt Wright:**

Great. We might go to the next question.

Petta asks:

*Q: If I self-manage for my children, is there any services that must be registered with the NDIS, or can I use any services that I choose? I’m in a remote area, and there’s limited registered providers.*

Alright. I might go to Marita and then I think - - -

**Marita Walker:**

I’ll do a short answer. Self-management means you can use a range of providers that do not need to be registered.

**Matt Wright:**

And I think you were making that point before Kristie as well.

**Kristie McCarthry:**

Yeah. Absolutely.

**Jan Kruger:**

Can I just say something? I used to live in rural New South Wales, and I often think about the situation Jack would be in if we were still living there. And I think that’s the beauty of self-managing, and particularly directly employing people. Because I have heard of families splitting up so then they can move to an area where there are services, but the beauty of self-managing and directly employing staff means that you can stay in your own community and still be embedded in participating in roles in the community. So I think it’s a great opportunity for remote areas.

**Matt Wright:**

And I think we’ve touched on this, but just to make it clear Marita, if you are self-managing you can use both registered and unregistered providers?

**Marita Walker:**

Yep.

**Matt Wright:**

Yep. Terrific. Alright. We might go to our next question.

The next person has asked:

*Q: I self-manage for my 19 year old son. Why is there an amount allocated in his plan for support coordination when I do all this for him? I have been hesitant to employ further services for our son worrying that it will not be approved by the NDIS if an audit is done later on. Is my concern real?*

Marita?

**Marita Walker:**

Okay. There’s two separate questions there. It’s interesting. It can go either way in terms of having support coordination when you self-manage. Some people actually find that quite helpful, because it can assist you with thinking about possibilities.

**Kristie McCarthy:**

Especially when you start.

**Marita Walker:**

So some people would welcome it and then find that they don’t need it next time round. And in your situation it sounds like you have it but you’re not using it. So there’s no requirement for you to use it, and you can say at the next review that that’s not something that you require next time. So that will be fine. Nobody will insist that you have it.

So moving on to the next question.

**Matt Wright:**

Jan, I just wanted to - - -

**Marita Walker:**

No. The second part of that question.

**Kristie McCarthy:**

It’s back on the screen.

**Matt Wright:**

Okay. Sorry Marita.

**Marita Walker:**

So in terms of further services, really just within a plan period you have the funding that you have, and so you need to just think through is that a support that I can clearly identify how it’s achieving the goals in the plan for my son. And that’s all you need to worry about.

**Matt Wright:**

Terrific. Great. Jan, you brought up the concept before of circles of support. I think it would be fabulous for families to understand a little bit about what that means and your experience with circles of support.

**Jan Kruger:**

Jack has a circle of support. So they’re people that we’ve invited to help Jack achieve his goals. It sort of sits outside of the NDIS. It’s people in his life that are there in a freely given way. And actually they’re really trying to understand the NDIS. God forbid if anything happens to my husband and I, they actually want to be across it so then they can continue to support Jack to achieve his goals.

But we just had a gathering on the weekend, and there’s a big focus on Jack achieving employment goals. So we’re trying to use all of their networks to try and find that paid role for Jack, but as well as getting some work experience. So basically it’s a group of people that we’ve invited to be part of Jack’s life and to help Jack realise his goals. And we make sure that Jack’s very much at the heart of that.

**Matt Wright:**

Great. Thank you. We might go to the next question. Jeliza asks:

*Q: I know you can’t engage family members as paid support, but can you engage friends?*

Marita?

**Marita Walker:**

The short answer is yes, if they are the right person to achieve the support for your family member. But keep in mind that a friendship relation is reciprocal and freely given, and when you start to engage a friend to provide support, it can be complicated. Kristie might want to add.

**Kristie McCarthy:**

Yeah. Absolutely it can bring complications, but if it’s the right fit, if you’ve got friends that – my particular situation is they were carers first and became friends, and then are no longer as much carers. But same thing. It can bring complexity to the relationship, but communication, working through those sort of complexities.

**Matt Wright:**

Terrific. Sam, how did the UK deal with these issues of friends and family members receiving paid support?

**Sam Bennett:**

So very similar system actually in respect that the ability to employ family members is precluded under the legislation, but there are some exceptional circumstances where it’s allowed. And in terms of friends, it’s the same answer I think. It’s an individual decision and there’s nothing that precludes it, but you’ve got to think carefully about how you’re going to maintain those important relationships.

**Kristie McCarthy:**

I probably wouldn’t hire a friend that is already an established friend, because it’s such a great relationship. I don’t want to put any added complication.

**Matt Wright:**

Terrific. Fabulous. Next question.

Ruth asks:

*Q: Does the participant need an ABN or set up a business in order to self-manage? And insurance and liability issues, how are those managed?*

Marita?

**Marita Walker:**

I’ll do the short answer and then ask the other panel members. No. If you decide to directly employ staff, you do have the responsibilities of an employer and they are described under legislation, some of which is state legislation, some of which is Commonwealth. And you do need to be compliant with that. But I’ll hand over to Jan and Kristie.

**Jan Kruger:**

Do you want to go Kristie?

**Kristie McCarthy:**

Yeah, sure. So if you’re only using other people, so if you’re getting services from say a registered provider or any other person that has their own ABN, no, you don’t need an ABN. But in my case, because I do directly employ, I do need an ABN and I do need insurances, like WorkCover insurances. But again, it is all about looking at – the different government organisations will provide advice on how to run a business, but it doesn’t have to be like that. If you choose only to purchase your services, then you don’t need an ABN.

**Jan Kruger:**

So we actually have – because we’re the employer, it’s not a business, but we have to have a WPN, just to another level. But that’s all you need. And then you just need to get advice. So it’s simply ringing your insurance company and explaining what the insurance is for, and they’ll talk you through it. And yes, you’ll need to get the worker’s comp and public liability and have those responsibilities. But it’s a WPN, so it’s a withholding payment number, because you’re not actually – it’s just withholding tax for that purpose. So it’s not a business where you’re making money.

**Matt Wright:**

Alright. We might go to our next question.

Swati has asked:

*Q: What is the audit process of self-managers?*

So we might ask Kristie. What is the audit process that you have to - - -

**Kristie McCarthy:**

So basically it’s all about keeping your receipts and having good documentation as to what your services are being used for. And you can send them to the NDIA or just wait until they ask you for an audit. But really it’s just keeping receipts. Basic stuff. Yeah.

**Sam Bennett:**

And I think the important thing there is keeping the receipts and being able to link the receipts to the goals that are in your plan. The process by which we do the audit is probably one that we’re still learning and evolving over time, but self-managers will – and the guide talks about this, that you can be called as part of an audit process, and the expectation would be that you provide those receipts as to the expenditure that you’ve made.

**Jan Kruger:**

And I do know a few families that have been audited, and it hasn’t been – I think it feels very nerve-wracking to think that you might be audited, but provided you’ve kept everything, they might be just asking to look at a few different transactions, not the whole three years. I mean that may change, but families and individuals haven’t found it as an arduous process.

**Marita Walker:**

I will just add that we’re thinking that at the time of plan review there will be a review of your strategies and your purchasing. So that’s a bit separate to audit, but just flag that it’s important to know that the strategies you’ve used, the things you’ve purchased, have actually assisted in the achievement of your goals, and that will become a more prominent part of review.

**Matt Wright:**

Sam, in the UK was there a number of things or strategies put in place to make people with disability and their families feel more comfortable with the process of self-management, and what were those things?

**Sam Bennett:**

I think any process where money is going directly to participants needs to have some controls around it so that participants feel safe in that and to protect the scheme as well. Back in the UK context, I think over a period of time we developed strategies through which we did that. One was related to the frequency of payments. So I think in the NDIS at the moment the funding is there from the outset for the duration of the plan, whereas we staggered payments by and large, and didn’t preclude the ability to have upfront payments for pieces of equipment or one off expenditure, but ongoing expenditure was managed through some frequency of payments.

And then as Marita alluded to in terms of the review process, that’s the key point I think in terms of being able to look at whether the plans that people have put in place and the things that have been purchased are helping to meet their goal. And if they’re not, there’s a conversation around what’s been learnt and what other things might be tried. But I think a focus on that element within reviews is a really sort of sensible thing to include in the system.

**Matt Wright:**

Great. Thank you. Okay. We’ve got time for just one last question. Jane asks:

*Q: Can the NDIS pay for the facilitator for a circle of support?*

Okay. I might throw this to Jan.

**Jan Kruger:**

We don’t actually pay our facilitator, but it was something that I think is really important and that the NDIA should be investing in this, because it’s actually investing in the development of freely given relationships in a person’s life, particularly if they’re quite isolated. I think it definitely could be something that you could use potentially. If that’s one of your goals, you could use some of your core funding.

**Matt Wright:**

Alright. So that’s about all we’ve got time for. I’d like to ask Sam what’s next from here for the NDIA and self-management?

**Sam Bennett:**

Thanks Matt. I mean I’ve learnt a lot just during the course of the discussion, particularly from Kristie and Jan and Jack’s story today. I think we’ve got work still to do. This is a journey for us. The scheme is still young, and our systems and processes around self-management need to mature, so we’ve got work to do on that. We’ve got work to do to continue to listen to people like Jan and Kristie about their experience, from people that aspire to self-manage so that we can look at the sorts of things that would help them to make that decision.

But I see no reason why we can’t aspire to the NDIS setting a gold standard for self-management and for many more thousands of people to benefit from that choice under the NDIS. We’re making some changes through the pathway enhancements that we’re currently implementing, and I think the publication of the guide I hope is an important milestone on that road as well.

But for that to happen I’d encourage the participants that have been watching today’s webinar to check out that guide, have a conversation with your local area coordinator, locate someone in your community, a peer, to discuss what self-management has been like for them, and take that first step.

**Matt Wright:**

Alright. So that’s all we have time for. I’d really like to thank our panellists for contributing to the discussion today, and I’d like to thank you all for contributing your online questions and comments. And we look forward to you joining us at the next NDIS webinar. Goodbye.

[*Closing visual of slide with text saying ‘National Disability Insurance Scheme (NDIS)’, ‘Self-management webinar’, ‘ndis’, ‘Delivered by the National Disability Insurance Agency’*]

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