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PROC-4807: Disability Expert Advice Report

Version: 2

Date: May 2025

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Summary of Disability Expert Advice

Requirement		Tender 2: Melbourne University	
Ages		Suitable for ages 16+ and all adult NDIS participants.	
Disability groups		Potential to address many disability groups' needs but requires further development for psychosocial disabilities.	
Culturally appropriate		Recommendation for culturally sensitive assessors and training. Concerns about power dynamic that could be exacerbated by assessment length.	
Recognises diversity LGBTIQASB+		Concerns about optional inclusions in training. Mandatory inclusion recommended.	
Trauma informed		Aims to minimise distress with strength-based focus and allows alternative sources of information.	
Available in English		Available in English	

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Requirement		Tender 2: Melbourne University	
Information from appropriate sources		Collects information from appropriate sources but the performance-based aspect is unclear.	
Contexts relevant to the NDIS		Recognised that the tool could be administered in multiple contexts and environments relevant to the NDIS.	
Assessor accreditation and training		Support for experienced AHP with trauma informed approaches. Disability knowledge and experience important.	
Additional materials		Important to match an assessor with appropriate experience to the needs, disability type of the participant.	
Other operational support		Supports frequency and intensity scoring scales but raised concerns about translating identified support needs into funding.	

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Introduction

Further to the Evaluation Plan for the Support Needs Assessment Tool (PROC-4807), the Evaluation Committee has sought advice from the Disability Expert Advice Panel in reference to requirements within components one (under “Suitable for NDIS Cohorts” and “Supports a Positive Participant Experience”) and two of the tender. The advisors were also asked to answer, “What would you like the Evaluation Panel to investigate in more detail to understand which tools provide a good participant experience?” for each tender.

The Disability Expert Advice Panel was formed from responses to an Expressions of Interest request sent to Disability Representative Carer Organisations on Friday 7th March 2025. Submissions were reviewed with reference to the following criteria:

1. A person with disability
2. Relevant knowledge of the needs and experiences of people with disability
3. Demonstrated experience working in a collaborative and consultative manner with diverse stakeholders

Panel member selection was reviewed to ensure diversity of age, geographical location, disability type and knowledge content areas.

Approach

The following process has been undertaken to collect, collate and confirm information from the Disability Expert Advice Panel:

- 23 April 2025: Introductory meeting, overview of tools and evaluation criteria
- 24 April 2025: De-identified tender information provided to the panel.
- 28 April 2025: Workshop to discuss the tender responses and draft advice.
- 30 April 2025: A review/consensus meeting on the draft report content.
- 5 May 2025: Individual workshop with a person with intellectual disability was held.
- 5 May 2025: First report version sent to the Evaluation Committee.
- 7 May 2025: De-identified tender information provided to the panel
- 12 May: Panel reconvened to consider Tender 3 and draft advice. An individual workshop with a person with intellectual disability was also held.
- 14 May: Individual consensus meeting with person with intellectual disability
- 15 May: A review/consensus meeting on the draft report content.
- 15 May: Updated report sent to the Evaluation Committee

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Tenders

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Tender 2: University of Melbourne

s45 - material disclosed in confidence, s47C - deliberative processes, s47G - business information



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Expert advice to support evaluation of the component one technical requirements

Version: 1

Date: May 2025

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1. Overview of component 1 requirements

The following table was included in the Request for Tender Package provided to tenderers. It provides an overview of the four component 1 requirements, and the types of indicators/evidence that would be expected in a submission.

Requirements

The assessment tool(s) should meet the set of requirements outlined under the following four headings. The assessment tool(s) should:

1.1 Be suitable for NDIS purposes:

Requirement	Indicators/Evidence
1. The tool(s) primarily assess disability support needs The tool(s) primarily assesses the concept 'support needs' and does not primarily assess other concepts such as functioning, severity of impairment, quality of life, or non-disability support needs (e.g. carer support needs, or supports only related to other areas of need such as health or housing).	- Measures attributes of disability-related support needs of people with disability (rather than concepts such as function, impairment or quality of life), and - Measures attributes of support needs such as type, frequency, and intensity, and - Scales should be ordinal or continuous and have at least three levels.
2. The tool(s) assess need in relation to NDIS supports The list of disability-related supports funded by the NDIS is available on the NDIS website . The support needs assessment tool should assess the pertinence of these supports to the person with disability.	Scales or domains demonstrate the coverage of relevant support type(s).
3. The tool(s) assess needs across a broad range of support need areas The solution assesses needs across a range of life areas in which a person may have disability-related supports. For example, it assesses needs across the activity and participation areas described in the International Classification of Functioning, Disability and Health (ICF), including	Domain structure and content demonstrate coverage of each support need area.

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Requirement	Indicators/Evidence
disability-related health needs and behavioural support needs).	
4. The tool(s) are appropriately structured The structure of the tool(s), including the domains and associated items is well-validated, supported by a strong theoretical/conceptual basis with empirical evidence.	- Description of relevant and contemporary theoretical underpinning of the structure of the tool(s), and/or - Studies exploring the structural validity and/or internal consistency of the tool(s) found satisfactory results (as defined by recognised standards for the interpretation of psychometric results) in relevant cohorts.
5. The outputs of the tool(s) support appropriate budgeting decisions in respect to NDIS Supports The data derived from the assessment tool(s) include scores for each domain and/or support need area in sufficient detail to inform the budgetary requirements of the participant.	Outputs are provided for each domain of the tool(s) (i.e. does not only provide one overall score).
6. The tool(s) are consistent with a contemporary model of disability Conceptually founded or consistent with a model of disability such as the International Classification of Functioning, Disability and Health (ICF), Canadian Occupational Performance Model, or the Disability Creation Process Model.	- Evidence of the use of relevant models in the development of the tool(s), and/or - Satisfactory description of how the tool(s) are consistent with one or more contemporary model of disability.
7. The tool(s) are able to produce consistent outputs Demonstrated sufficient reliability (including inter-rater, inter-respondent, test-retest and intra-rater reliability).	Research studies to assess the tool(s)' reliability found satisfactory results (as defined by recognised standards for the interpretation of psychometric results) in relevant cohorts.
8. Evidence of tool(s)' ability to predict support needs Evidence to indicate the assessment tool can accurately predict support needs, as demonstrated through its practical	Research studies which statistically explored the tool(s)' predictive validity found satisfactory results (as defined by recognised standards for the interpretation of psychometric results) in relevant cohorts, and/or

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Requirement	Indicators/Evidence
application in another relevant context and/or statistical evidence within a research context.	Previous examples which demonstrate the tool(s)' ability to be used to predict support needs in another relevant context.

1.2 Be suitable for NDIS cohorts:

1. The tool(s) are appropriate for relevant ages The solution has been developed for, or successfully tested with, people with disability aged 16+ to reflect the range of age cohorts accessing the NDIS.	- Appropriateness for relevant ages demonstrated through the Initial design or subsequent revisions of the tool(s) (e.g. consideration of domains, questions, response options), and/or - Appropriateness for relevant ages demonstrated through subsequent testing of the tool(s) (e.g. satisfactory results or feedback).
2. The tool(s) are appropriate for disability groups relevant to the NDIS The solution has been developed for, or tested with, people with disabilities relevant to the NDIS's participant cohorts. These include people with neurodevelopmental conditions, physical disability, neurological conditions, degenerative conditions, and psychosocial disability.	- Appropriate for (tested or developed with) disability groups accessing the NDIS, and/or - Demonstrated ability to tailor the assessment for different disability groups (e.g. semi-structured interview).
3. The tool(s) can be administered in a culturally appropriate way Tool's content and administration requirements includes and supports sensitivity and respect towards cultural differences, including any practices, translations, and representations are suitable for a diverse range of participants, including Australian First Nations Peoples. This includes a demonstrated awareness of how various ethnic, racial, and linguistic groups differ from one another and recognising the significance of their cultural elements.	- Does not contain concepts, practices or language that are culturally insensitive or inappropriate, and/or - Tested and validated with a range of cultural groups (including Australian First Nations Peoples), and/or - Multiple language versions available.

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4. The tool(s) can be administered in a way that recognises the diversity of members of the LGBTIQASB+ Communities The tool(s) account for the diversity of relationships (including family structures, such as chosen family) and uses gender-conscious language (as defined here: <u>Inclusive Language Playbook: Writing for LGBTQ+ Communities</u>) that recognises the diversity of gender.	Does not contain concepts, practices or language that do not recognise the diversity of members of LGBTIQASB+ Communities.
5. The tool(s) can be delivered in a way that is trauma informed Able to be administered in a trauma-informed way (either through inherent properties that are trauma-informed, or a lack of inappropriate properties).	Does not contain concepts, practices or language that are inconsistent with trauma informed practice.
6. The tool(s) are available in English The tool(s) are available in English, with minimal colloquialisms or terminology that would be unfamiliar to an Australian audience.	English version available (may have been validated in another language and no significant changes have been made).

1.3 Support a positive participant experience:

1. The tool(s) collect information from appropriate sources The tool(s) allows, but not require, self-reporting by the participant. It should also include the ability for information to be incorporated from multiple sources (e.g. carers, information from treating professionals).	- Description of sources of information able to be used by the tool(s) as described in the administration manual/instructions, and/or - Appropriate information sources demonstrated through initial design or subsequent testing.
2. The tool(s) can be administered in contexts relevant to the NDIS	Description of contexts suitable for administering the tool(s) as described in the administration manual/instructions, and/or

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The tool(s) is able to be administered in a range of environments (e.g. NDIS offices, the participant's home etc.), and allows, but does not require, in-person assessment (e.g. permits assessments via video call).	Appropriate administration contexts demonstrated through initial design or subsequent testing.
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1.4 Suitable for NDIS business requirements:

1. Assessor workforce The tool(s) are able to be administered by a multi-skilled workforce with differing levels of professional qualification and disability experience.	• Description of requirements for assessor skills, training or qualifications as described in the administration manual/instructions, and/or • Appropriate assessor skills, training, or qualifications demonstrated through subsequent testing.
2. Administration time required The average time taken to administer the tool(s) is reasonable, in that it enables collection of sufficient information to understand a participant's holistic disability support needs.	• Description of expected face to face administration time as described in the administration manual/instructions, and/or • Description of expected preparation, scoring and report writing time as described in the administration manual/instructions, and/or • Evidence of administration time in research studies or other similar cohorts.
3. The solution utilises questionnaire or interview information collection methods The tool(s) should use questionnaire or interview information collection methods, rather than relying on performance-based methods. Ability to administer the tool(s) using semi-structured interview methods is beneficial.	• Description of appropriate information collection methods as described in the administration manual/instructions, and/or. • Appropriate information collection methods as demonstrated in subsequent testing.



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PROPOSAL TO UNDERTAKE A PROCUREMENT OVER \$400,000

PROC-4807 – FOR THE PROVISION OF SUPPORT NEEDS ASSESSMENT TOOL(S) TO SUPPORT NDIS REFORM INITIATIVES

1. Purpose

1.1. To seek your approval to conduct an approach to market (ATM) for:

Table 1: Approach to Market Overview

Services	The provision of support needs assessment tool(s), related operational support services and a system integration solution
Decision Reference	Not Applicable
Record location	GM-AAD-PROCUREMENT-BRANCH - PROC-4807 - Procurement of Needs Assessment Tool(s) to Support NDIA Reform Initiatives - All Documents
Procurement category	General goods and services
Expected contract value (GST inclusive)	\$10-\$30 million (GST inclusive)
Expected services commencement	April/May 2025
Expected services expiry	April 2030
Initial term	5 years
Extensions	Up to 5 years
Procurement Manager's details	s47F - personal privacy

2. Background and requirements

Assessment and Budgeting Initiative

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- 2.1. The Policy, Evidence and Practice Leadership Division is leading the NDIA's Assessment and Budgeting Initiative. This initiative is responsible for developing legislative instruments to give effect to new framework planning.
- 2.2. Under new framework planning, participants will undergo a structured needs assessment to assess their disability support needs, for the purpose of generating flexible budgets and/or identifying stated supports.
- 2.3. The assessment approach must use a range of off-the-shelf needs assessment tools which are capable of being administered in a strengths-based and trauma informed way and which are reflective of a contemporary understanding of disability.
- 2.4. This procurement will lead to the selection of off-the-shelf needs assessments which will be incorporated into legislative instruments which govern the assessment process for adult participants (>16 years old).
- 2.5. This procurement will also seek a range of operationalisation support services, including a flexible training and accreditation solution for the NDIA's future support needs assessor workforce.
- 2.6. This procurement will also seek a solution for integrating the selected support needs assessment tool(s) into NDIA operations, including the ICT environment.
- 2.7. After selection of a supplier, the NDIA will seek to enter into a commercial arrangement for a period of five years, with the option for an extension of up to five year.
- 2.8. There are three approaches to market activities being undertaken by the NDIA as part of the Assessment and Budgeting Initiative:
 - a) Request for Tender – Support needs assessment tools for adults (this procurement) with the following three components: Assessment tool, operationalisation support, system integration software
 - b) Request for Information – Assessment tools for children, to inform further procurement activities in 2025
 - c) Request for Information – Targeted assessment modules (e.g. for assistive technology, home modifications and disability-related health supports), to inform further procurement activities in 2025

3. AAI Exemption

- 3.1. This procurement will be compliant with the Accountable Authority Instructions (AAIs), and therefore no exemption is required.

4. Method of procurement

- 4.1. It is proposed that an open approach to market be undertaken, with this procurement publicly advertised on the Commonwealth's Tendering website AusTender (www.tenders.gov.au).

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OFFICIAL**5. Value for Money**

5.1. This procurement is considered an effective and efficient use of NDIA resources as it:

- a) will encourage competition and be non-discriminatory as it is an open tender which all potential suppliers can engage in whether domestic or international
- b) will use public resources in an efficient, effective, economical and ethical manner that is consistent with the policies of the Commonwealth and Agency,
- c) will facilitate accountable and transparent decision making as it will enable interested parties to follow how the successful supplier was approached and selected
- d) encourages appropriate engagement with risk as it requires a high degree of procurement and probity support
- e) is commensurate with the scale and scope of the business requirement, and
- f) will use the Evaluation Plan to determine how value for money could be achieved through an assessment of the demonstrated technical capabilities, financial costs, and risks associated with each of the submissions.

6. Risks

- 6.1. A risk assessment has been undertaken for this procurement activity in accordance with the requirements of the NDIA Procurement Policy and the [Agency's risk management framework](#).
- 6.2. The overarching risk associated with this procurement has been assessed as high value and complex/strategic for the following reasons:
- a) The goods being sourced may require customisation and supplier innovation may be required
 - b) The goods are highly critical to the NDIA and core operations
 - c) The procurement relates to matters that are of high-level government, media or political interest
 - d) There are significant interdependencies with other projects
 - e) The value of the procurement is estimated at between \$10-\$30 million.
 - f) The non cost value of the procurement is very high
 - g) The purchase of the goods/services directly aligns with and promotes the priorities and objectives of the NDIA and the government.
- 6.3. A copy of the full risk assessment can be found in **Attachment D** to this document.

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OFFICIAL**7. Estimated Budget**

- 7.1. The estimated total cost of the procurement, inclusive of all potential extension options being used, is between \$10,000,000 and \$30,000,000 (GST inclusive).

Forward year commitment

- 7.2. A forward-year commitment is required for this procurement. There are a range of uncertainties in calculating the overall costs of this procurement. An estimate of the current and forward year committed funds required, including all potential extension options, are detailed below.
- 7.3. By signing this Proposal to undertake a Procurement, the Financial Delegate is declaring that they have sufficient unallocated funds available in the financial years specified.

Table 2: Example Forward Year Cost Projections (by Financial Year)

2024 to 2025 (GST inclusive)	2025 to 2026 (GST inclusive)	2026 to 2027 (GST inclusive)	2027 to 2028 (GST inclusive)	2028 to 2029 (GST inclusive)	2029 to 2030 (GST inclusive)	Total including option to extend (GST inclusive)
\$2.5 million	\$2.5 million	\$2.5 million	\$2.5 million	\$2.5 million	\$2.5 million	\$30 million

Engagement of independent advisers to assist with the procurement

- 7.4. This procurement is part of a program of procurements under the Assessment and Budgeting Initiative. In light of the complexities and strategic significance of this program, the following resources have been engaged for these activities:
- a) An independent probity adviser contracted through Legal Services
 - b) External legal services contracted through Legal Services, and
 - c) External procurement specialists.
- 7.5. Separate procurement processes have been undertaken for each of these independent advisers, and approval sought from the appropriate Financial Delegate.

Account details including Cost Centre

- 7.6. The below account details apply to this procurement:

Table 3: Account Details

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Cost Centre	GL Accounts
90714	42405 (Consultancy contract expenses excluding property) ICT Software Training Final GL Accounts will be nominated in the Approval to Enter into an Arrangement

8. Proposed timeline

- 8.1. The following timeline is proposed. The timeline may need to be adjusted to reflect confirmed changes in the timing of various stages of the evaluation process.

Table 4: Proposed Timeline

Activity	Indicative Date
Approach to market release	05 February 2025
Approach to market close	21 March 2025
Evaluation of submissions	21 March – 20 April 2025
Contract negotiation/finalisation	21 April – 15 May 2025
Contract commencement	15 May 2025

9. The Stakeholders

- 9.1. The key stakeholders for this procurement activity are:

Table 5: Stakeholders

Stakeholder / Stakeholder Group	Stakeholder Perspective	Our objective	Key messages	Methodology
Office of the CEO	Achievement of a NDIA objective	CEO to have knowledge that an ATM is occurring, including risks or issues	NDIA will be approaching the market in Q4 2024/Q1 2025 Results of the ATM including benefits	Timely briefs to the CEO Brief to CEO on the outcomes
Assessment and	Is the initiative lead	Initiative Lead to lead this	NDIA will be approaching the	Procurement Manager

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Stakeholder / Stakeholder Group	Stakeholder Perspective	Our objective	Key messages	Methodology
Budgeting Initiative	responsible for this procurement. Require an awareness and be kept up to date on the progress, issues, and future steps	procurement activity	market in Q4 2024/Q1 2025 The Initiative Lead will need to be kept aware of the status of the procurement, risks, and issues.	provide weekly updates to the Initiative Lead Initiative Lead to endorse key documentation before Financial Delegate review.
Procurement Branch	Will be supporting procurement activities	Communicate, align, and coordinate activities across the teams	NDIA will be approaching the market in Q4 2024/Q1 2025 Probity conditions apply	Consultative meetings, updates to Initiative Lead
Legal Services	Will ensure procurement and contracting approach is done within Agency risk tolerances			
Procurement Adviser (Procurement Branch)	Will be seeking confirmation that the procurement complies with the NDIA Procurement Policy and Probity Protocol. If there are complaints, will be responsible for managing them.	Ensure that this procurement complies with the NDIA Procurement Policy and Probity Protocol.	A procurement activity is being undertaken, and Procurement Adviser will be provided with drafts of the Request Documentation, Evaluation Plan, etc for review. That the procurement activity did comply with the NDIA Procurement Policy and	Consultative meetings Regular email updates Providing draft documentation to the Procurement Adviser

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Stakeholder / Stakeholder Group	Stakeholder Perspective	Our objective	Key messages	Methodology
			Probity Protocol.	
Potential providers	Increase in market share. NDIA as a 'trophy client'	Awareness of the procurement, issues and needs. Manage expectations	The NDIA has sought industry and specialist advice on the services. The NDIA is seeking to put in place a new arrangement. The successful tenderer will be required to deliver value for money and a high standard of services	Consultative meetings AusTender

10. Key Documents

10.1. Further to your agreement to this Proposal to undertake a Procurement, the following key documents will be prepared for your approval:

- a) Approach to Market Document - Request for Tender
- b) Additional Terms spreadsheet (software requirements)
- c) Draft contract for services
- d) Risk Assessment

10.2. Following the completion of the evaluation process, an Approval to enter into an Agreement, evaluation report, and a contract including the performance management framework will be prepared for your approval as the Financial Delegate.

11. Advice relating to the procurement process

11.1. Policy, Evidence and Practice Leadership Division has consulted with Agency Budget and Financial Controls Branch to confirm that there are sufficient unallocated funds available within the cost centre.

11.2. Additionally, Policy, Evidence and Practice Leadership Division has consulted with probity advisors Clayton Utz and commercial law advisors Maddocks Lawyers as well as NDIA's Procurement Branch, Legal Services Branch, Chief Information Officer Division and Service Delivery Group.

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12.1. No stakeholders have sought to direct aspects or outcomes of this procurement activity.

13. Compliance with relevant NDIA policies and directives

13.1. As required under the NDIA Procurement Policy (external), Evidence and Practice Leadership Branch has consulted with Procurement Branch during the completion of this document. The Procurement Advisers were [s47F- personal privacy](#) and [s47F- personal privacy](#).

13.2. As required by the NDIA Procurement Policy, Evidence and Practice Leadership Branch has consulted with the ICT Business Engagement Team (OCIO) on the proposed procurement activity.

13.3. This Proposal to undertake a Procurement has been prepared in accordance with the NDIA Procurement Policy and NDIA [Accountable Authority Instructions and Financial Authorisations \(external\)](#).

13.4. In compliance with the NDIA Procurement Policy, any Procurement Connected Policies that apply to this procurement and the proposed approach for managing them are in Attachment A.

13.5. In addition, this Proposal to undertake a Procurement is in accordance with the [NDIA Probity Protocol \(external\)](#) which includes the obligation for all Officers involved in a procurement process to maintain confidentiality and to declare any conflict of interest – actual, potential, or perceived – at the start of the process, to update it as necessary during the procurement, and that the declaration be recorded and retained as an important part of the procurement documentation.

13.6. No conflicts of interest were identified in the preparation of this Proposal to undertake a Procurement.

Table 6: Procurement Manager signature

Name	s47F - personal privacy
Position Title	
Signature	
Date	31 January 2025

14. Further consultations and endorsements

[s47F - personal privacy](#)

14.1. I have read this Proposal to undertake a Procurement:

- a) I support the proposed approach to market in this Proposal to undertake a Procurement,

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- b) I confirm that there are sufficient unallocated funds available within the cost centre, and
- c) I confirm that I have no known conflicts of interest in providing this endorsement, and I understand my confidentiality obligations.

Table 7: Procurement Owner signature

Name	s47F - personal privacy
Position Title	
Decision	Endorsed / Conditionally endorsed as detailed below / Not endorsed as detailed below
Decision comment	[Insert decision comment]
Signature	
Date	[insert date XX Month 20XX]

s47F - personal privacy

14.2. I have read this Proposal to undertake a Procurement and I:

- a) am satisfied that the procurement methodology is in accordance with the policies of the Commonwealth and the Agency, and
- b) confirm that I have no known conflicts of interest in providing this approval, and I understand my confidentiality obligations.

Table 8: s47F - personal privacy

Name	s47F - personal privacy
Position Title	
Decision	[Choose one of the following: Approved / Conditional approval as detailed below / Not approved as detailed below]
Decision comment	[Insert decision comment]
Signature	
Date	[insert date XX Month 20XX]

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14.3. The following additional key stakeholders:

- a) have reviewed and support this Proposal to undertake a Procurement, and
- b) in signing, have confirmed that they have no known conflicts of interest in providing their endorsement and that they understand their confidentiality obligations.

Table 3: Business Sponsor signature

Name	s47F - personal privacy
Position Title	
Decision	Endorsed / Conditionally endorsed as detailed below / Not endorsed as detailed below
Decision comment	[Insert decision comment]
Signature	
Date	[insert date XX Month 20XX]

15. Financial Delegate Approval

15.1. I have read this Proposal to undertake a Procurement and I:

- a) **approve** the proposed approach to the market for the provision of support needs assessment tool(s) and related training and operational support services on the terms set out in this Proposal to undertake a Procurement,
- b) **approve** the method of procurement identified in section 4 of this Proposal to undertake a Procurement,
- c) **approve** the risk assessment undertaken together with the proposed mitigations detailed in Attachment B to this Proposal to undertake a Procurement,
- d) am satisfied that there is a genuine need to procure these goods/services,
- e) confirm that there are sufficient unallocated funds available within the cost centre, and
- f) confirm that this procurement will make efficient, effective, ethical, and economical use of public money.

Table 4: Financial Delegate decision

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Decision	[Choose one of the following: Approved / Conditional approval as detailed below / Not approved as detailed below]
Decision comment	[Insert decision comment]

15.2. In making this decision, I confirm that:

- a) this decision is within my financial delegations in accordance with the NDIA [Accountable Authority Instructions and Financial Authorisations \(external\)](#),
- b) this decision is in accordance with the policies of the Commonwealth and the NDIA including the CPRs, NDIA Procurement Policy and the NDIA Probity Protocol, and
- c) I have no known conflicts of interest in providing this decision, and I understand my confidentiality obligations.

Table 5: Financial Delegate signature

Name	s47F- personal privacy
Position Title	
Signature	
Date	[insert date XX Month 20XX]

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15.3. The following policies will be addressed as part of this procurement:

- a) Modern Slavery Act 2018
- b) Workplace Gender Equality
- c) Commonwealth Child Safe Framework (CCSF)
- d) Workplace Gender Equality (WGE)
- e) Commonwealth Child Safe Framework (CCSF)
- f) Privacy Act 1988 (Cth) – A PIA is being developed in collaboration with the Privacy Team which [insert results of the PIA assessment]. The full PIA is at Attachment XX.
- g) Disability Action Plan obligation (The Agency has committed to investigating whether a business that exists primarily to provide employment or support to people living with a disability has the capability to fulfil its needs before making any approach to market at or above the relevant procurement threshold)
- h) Indigenous Procurement Policy (IPP)
- i) Shadow Economy Policy
- j) Payment Times Procurement Connected Policy

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Detailed Risk Register

Please refer to the Risk Action Plan attached for this procurement.

This document was released under the Freedom of Information Act 1982 by the National Disability Insurance Agency.

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APPROVAL TO ENTER INTO AN AGREEMENT

PROC-4807–FOR THE PROVISION OF NEEDS ASSESSMENT TOOLS TO SUPPORT NDIS REFORM INITIATIVES

1. Purpose

- 1.1. Your approval is required to adopt the recommendations in the Negotiation Report (**Attachment A**) relating to the Approach to Market (ATM) **PROC-4807**– for the provision of Support Needs Assessment Tool(s) to support NDIS reform initiatives.
- 1.2. In accordance with the [NDIA Accountable Authority Instructions and Financial Authorisations](#), your approval, as the Financial Delegate, is required to award a contract to:

Table 1: Proposed Agreement Overview

Supplier:	University of Melbourne (ESSentials Vendor number: 1009702)
Services:	The provision of support needs assessment tool(s) related operational services and a system integration solution
Decision Reference:	EC25-000320 – Proposal to undertake a Procurement EC25-002555 – Approval to Enter into Negotiations
Record location:	PROC-4807
Procurement category:	General goods and services
Value (initial term):	Total agreement value for the initial term: \$28,855,537 (GST inclusive)
Total value (if all contract extensions are exercised):	Maximum value of the arrangement: s47G - business information (GST inclusive). Additional funding will be required if the parties agree to contract extensions in 2030. Approval will be sought from the Financial Delegate before any extension options are exercised.
Applicable panel:	N/A

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Commencement date:	20 August 2025 or on execution by the NDIA Financial Delegate
Expiry date:	5 years from the Commencement date.
Initial term:	5 years
Extensions:	Up to 5 years
Contract Manager's details:	s47F - personal privacy

2. Procurement process overview

- 2.1. The CEO approved the Proposal to undertake a Procurement on 04 February 2025 in PDMS (EC25-000320).
- 2.2. The Request for Tender was released through AusTender on 05 February 2025 with a Closing Time of 1400 on 28 March 2025.

2.3. s47G - business information

Details are included in the Evaluation Report included in **Attachment A** in PDMS – EC25-002555.

- 2.4. The evaluation process was completed on 17 June 2025, which recommended that the NDIA enter into negotiations with the University of Melbourne to improve value for money outcomes and reduce risk.
- 2.5. You signed the Negotiation Directive to support this activity on 30 June 2025 (EC25-002555).
- 2.6. Negotiations were undertaken over the period early July to early August 2025, with all matters in the Negotiation Directive satisfactorily resolved.
- 2.7. The Negotiation Report which provides the final value for money assessment, risk rating and the recommended outcomes for this procurement process is at **Attachment A**.

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OFFICIAL**Risk rating**

2.8. Following negotiations, the overall risk rating for entering into an agreement with Melbourne University is medium. The full risk assessment, together with the proposed mitigations, is included in the Negotiation Report in **Attachment A**.

2.9. s42 - legal professional privilege, s47G - business information

2.10.

Value for Money

2.11. As detailed in the Negotiation Report, this procurement outcome is considered to represent value for money to the Commonwealth as:

a) s47G - business information

b) The Tenderer's support needs assessment tool is the best solution available of those Tenderers that passed initial screening to the technical evaluation to meet the NDIA's reform objectives;

c) Through negotiations, the NDIA and the Tenderer resolved the NDIA's issues with the Tenderer's submission, relating to the services to be delivered. The services are detailed in the refined Statement of Requirements;

d) s47G - business information the tool is far more suitable to the NDIS context than other tools offered, and the proposed personnel have significantly more relevant experience related to assessing support needs than other Tenderers, which contributed to value for money;

e) s47G - business information

f) While the final agreed pricing is approximately 5% (\$1.5m) higher than that proposed by the University of Melbourne in its tender submission, this

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differential is due to offer clarification and the increased scope of workforce training and support required by the Agency (\$2.9m more than originally tendered for). Other proposed services (relating to stakeholder engagement and operationalisation support) were reduced in scope, with associated pricing for those services also reduced as a result (\$1.4m less than originally tendered for).

- g) The procurement will use public resources in an efficient, effective, economical and ethical manner that is consistent with the policies of the Commonwealth and Agency;
- h) the proposed solution will facilitate accountable and transparent decision making, including through the delivery of Workstream 3, outlined in the Statement of Requirements
- i) the proposed solution / proposed approach encourages appropriate engagement with risk;
- j) the price is commensurate with the scale and scope of the business requirement, and;
- k) The Evaluation Committee and Negotiation Team used the Evaluation Plan to determine how value for money could be achieved through an assessment of the demonstrated technical capabilities, financial costs, and risks associated with each of the submissions.

2.12. This Approval to enter into an Agreement does not involve payment in advance of goods or services being received (prepayment) under the [Finance Policies](#).

3. AAI Exemption

3.1. This procurement was compliant with the AAI, and therefore no exemption was required.

4. Financial Management Compliance System (FMCS) Breach

4.1. Not applicable.

5. Budget

Initial term of the arrangement

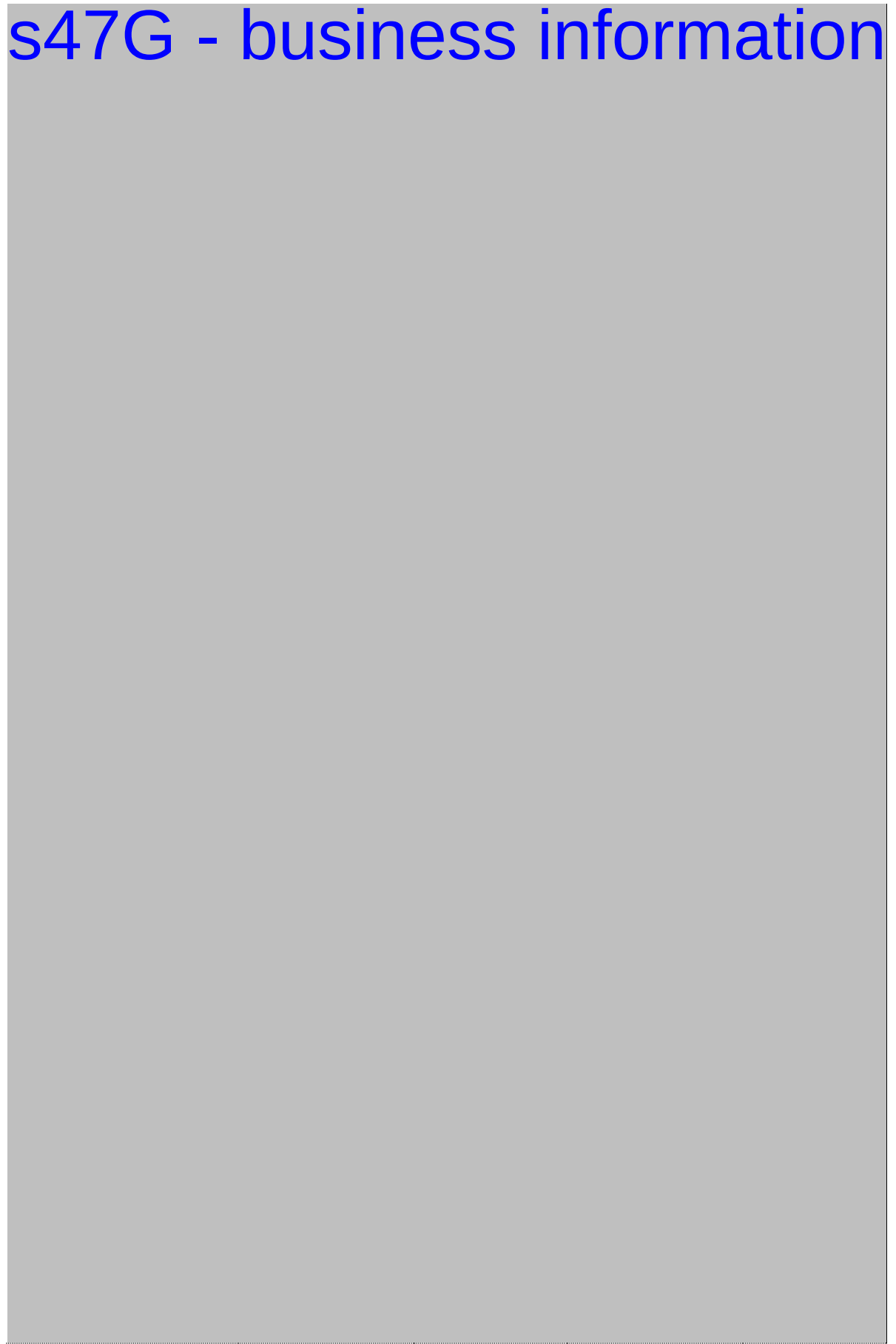
5.1. The value of the initial term of the proposed arrangement is \$28,855,537 (GST inclusive), inclusive of travel expenses and other contingencies, as identified in **Table 2: Fixed price amount for the initial term.**

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Table 2: Fixed price amount for the initial term

s47G - business information



This document was released under the Freedom of Information Act 1982 by the National Disability Insurance Agency.

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s47G - business information

- ### Maximum value of the arrangement

- ## Forward year commitment

- Table 3: Forward Year Cost Projections – initial term (by Financial Year)**

s47G - business information

OFFICIAL**Table 5: Forward Year Cost Projections – contract extensions (by Financial Year)**

s47G - business information

5.7. Total including all possible extensions: s47G - business information

Account details including Cost Centre

5.8. The below account details apply to this procurement:

Table 6: Account Details

Cost Centre	GL Account	Product Category
90714	42530 – Contractors – Non IT	Business Admin Services

Admin fee for the Panel

5.9. Not applicable.

6. Approving commitments of Agency money

6.1. Not applicable.

7. Advice relating to the procurement process

- 7.1. The Procurement Manager has consulted with Procurement Branch during the completion of this document. The Procurement Advisor was s47F - personal privacy.
- 7.2. Clayton Utz were engaged as the probity adviser as part of this procurement activity, and their written sign off on the evaluation process and conduct at negotiations is at **Attachment C**.
- 7.3. Maddocks provided legal advice as part of this procurement activity, and its legal sign off is at **Attachment D**. Agency Legal Services Branch was also consulted during the procurement process.
- 7.4. The Procurement Manager has consulted with s47F - personal privacy, Budget Management, Strategy and Support Branch to confirm that, following CEO support provided on 13 August 2025, and pending Resourcing Committee approval, there will be sufficient funds available within the cost centre for the payment milestones outlined in Schedule F of the contract (**Attachment B**), including the initial payment of s47G - business information for the tool.

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- 7.5. Additionally, the Policy and Practice Leadership Division consulted the following individuals and select members of their teams to develop the Statement of Requirements for the contract:

s47F - personal privacy

8. Deviations from the probity and legal advice given

- 8.1. The evaluation process and this Approval to Enter into an Agreement comply with the probity and legal advice provided, subject to any exceptions stated in the relevant sign-offs from those advisors.

9. Parties external to the procurement process seeking to influence the outcome

- 9.1. No stakeholders have sought to direct aspects or outcomes of this procurement activity.

10. Compliance with relevant NDIA policies and directives

- 10.1. As required under the NDIA Procurement Policy, s47F- personal privacy has consulted with Procurement Branch during the completion of this document. The Procurement Adviser was s47F - personal privacy and s47F - personal privacy.
- 10.2. As required under the [NDIA Procurement Policy](#), I confirm that I have undertaken the Procurement Fundamentals LEAP module.
- 10.3. This Approval to enter into an Agreement has been prepared in accordance with the [NDIA Procurement Policy](#), NDIA [Accountable Authority Instructions and Financial Authorisations](#), and the [NDIA Probity Protocol](#) that requires all Officers to declare conflicts of interest.
- 10.4. One conflict of interest was identified through this procurement process that required recusal from the procurement process:
- a) s47F- personal privacy
recused s47F- personal priva from any involvement in the procurement due to a declared personal friendship with a person who works at the University of Melbourne. This recusal took place as soon as s47F - persona became aware that the University of Melbourne was likely to

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submit a tender, and s47F - personal privacy had no involvement in the evaluation process once the procurement was closed. The Evaluation Committee determined that the declared conflict of interest did not affect the procurement process, and no further action was required.

- 10.5. All other declared conflicts of interest were deemed to be insignificant with no impact on the procurement process, and no further action was required. These were managed in accordance with advice from the Probity Adviser and are formally documented in the COI Declarations and Probity Issues Raised Register.
- 10.6. No other conflicts of interest were identified in the preparation of this Approval to enter into an Agreement, the Evaluation Report or the Negotiation Report.

Name	s47F - personal privacy
Position Title	
Signature	
Date	14 August 2025

11. Further consultations and endorsements

Evaluation Chair/ Negotiation Chair/ Procurement Owner Endorsement

11.1. I have read this Approval to enter into an Agreement and Evaluation Report:

- I endorse the procurement process undertaken and the recommendations in the Negotiation Report,
- I confirm that there are sufficient unallocated funds available within the cost centre,
- As required under the [NDIA Procurement Policy](#), I confirm that I have undertaken the Procurement Fundamentals LEAP module, and
- I confirm that I have no known conflicts of interest in providing this endorsement, and I understand my confidentiality obligations.

Name	s47F - personal privacy
Position Title	

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Decision	Endorsed
Decision comment	Endorsed
Signature	s47F - personal privacy
Date	14 August 2025

s47F - personal privacy

11.2. I have read this Approval to enter into an Agreement and I:

- a) am satisfied that the procurement methodology is in accordance with the policies of the Commonwealth and the Agency.
- b) confirm that I have no known conflicts of interest in providing this approval, and I understand my confidentiality obligations.

Name	s47F - personal privacy
Position Title	
Decision	Approved
Comment	Nil
Signature	s47F - personal privacy
Date	14 August 2025

12. Financial Delegate Approval

12.1. I have read this Approval to enter into an Agreement and the Negotiation Report and I:

- a) **approve** the recommendations in the Negotiation Report and this Approval to enter into an Agreement,
- b) **approve** entering into an agreement with Melbourne University in accordance with the terms in Section 1 of this document, and
- c) **approve** the risk assessment undertaken together with the proposed mitigations detailed in the Negotiation Report.

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12.2. In making this decision, I confirm:

- d) I note the Legal advice on the limited liability cap and provide approval to enter into an agreement in accordance with section 3.8 of the NDIA Accountable Authority Instructions (AAIs) and Financial Authorisations,
- a) confirm this procurement will make efficient, effective, ethical, and economical use of public money,
- b) this decision is within my financial delegations in accordance with the NDIA [Accountable Authority Instructions and Financial Authorisations](#),
- c) this decision is in accordance with the policies of the Commonwealth and the NDIA including the CPRs, NDIA Procurement Policy and the NDIA Probity Protocol, and
- d) I have no known conflicts of interest in providing this decision, and I understand my confidentiality obligations.

Name	s47F - personal privacy
Position Title	
Decision	Approved
Decision comment	I support and endorse the recommendations made by the panel and negotiating team. Contract value and associated terms, including in the schedules, are all approved. Well done to all involved in this complex process.
Signature	s47F - personal privacy
Date	14 August 2025

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OFFICIAL**Attachment A – Negotiation Report**

File name: FOR INFORMATION – PROC-4807 – NEGOTIATION REPORT

Attachment B – Contract (Marked Up)

File name: FOR INFORMATION - PROC-4807 - Attachment B - Contract (Marked Up Version)

File name: FOR INFORMATION - PROC-4807 - Attachment B - Contract (Marked Up Version) – Schedule C – Statement of Requirements

Attachment C – Probity Adviser Sign Off

File name: FOR INFORMATION – PROC-4807- Attachment C – Probity Sign Off Letter

Attachment D – Commercial Law Adviser Sign Off

File name: FOR INFORMATION – PROC-4807- Attachment D – Commercial Law Advisor Final Legal Sign-Off

Attachment E – Liability Risk Assessment

File name: FOR INFORMATION – PROC-4807- Attachment E – Liability Risk Assessment

Attachment F – Summary of Contract Departures

File name: FOR INFORMATION – PROC-4807- Attachment F - Contract Departures

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I-CAN v6 Workshop 1

Cohort Focus: Person with cognitive disability and/or communication difficulties

Domain Focus: Self Care / Communication

[ndis.gov.au](https://www.ndis.gov.au) | 4 December 2025

Acknowledgement of Country

Before we begin, I would like to acknowledge the Traditional Owners and Custodians of the Country on which we meet today, and their continuing connection to land, sea, and community. I pay my respects to their Elders, past present and emerging.

I would like to extend that acknowledgement and respect to any Aboriginal and Torres Strait Islander peoples here today.

Accessibility



Auslan interpreters will be spotlighted



Live Captions are available



There will be questions and answers at the end



Raise your hand if you have any questions



Easy Read resources will be linked



An accessible recording will be made available

Housekeeping

- Keep yourself on mute unless speaking
- Raise hand if you wish to speak
- Cameras, turn them on when speaking and introduce yourself.
- Phones, put on silent, take calls if an emergency
- Should you have any connection issues, log out and rejoin meeting
- We will have a 10-minute break halfway through the workshop
- Look after yourself, write 'be right back' (BRB) in the chat.



Agenda

1. Welcome and objectives
2. I-CAN fundamentals
3. I-CAN statements and scoring
4. Assessment preparation
5. Case Study Introduction - Cognitive Disability and Communication Support Needs
 - Pre-populating information
 - Strategies for working with non-verbal individuals or those using Augmentative and Alternative communication (AAC)
 - Using visual aids and simplified language effectively
 - Including family members and other key informants
 - Interview practice, I-CAN statements and scoring
6. What's Next
7. Questions and Answers

Learning Objectives

By the end of this session, participants will be able to:

- Explain I-CAN fundamentals
- Develop skills in writing strengths-based I-CAN statements and be able to score accurately
- Prepare effectively for assessments using best-practice guidelines.
- Analyse case study scenarios involving cognitive disability and communication support needs.
- Apply strategies for engaging non-verbal individuals or those using AAC.
- Demonstrate the use of visual aids and simplified language.
- Organise assessments to include family members and key informants.

Welcome and Introductions

- Introductions
- Overview of session goals and relevance to assessment and accreditation.
- Pre-workshop documents
 - Case Study: Olivia Jones - One-Page Profile and OT Functional Assessment Report
 - I-CAN v6 Scoring Manual
 - I-CAN v6 Self Assessment Checklist



I-CAN Fundamentals

- I-CAN Structure
 - Introductory Information (including Reason for Assessment, About Me, Current Life Situation)
 - Support Needs Assessment -12 Domains (each domain has 4 sub-domains except Physical Health which has 10)
 - Assessment Observations & Recommendations
- The 'I-CAN' formula
 - (name) **can** (do what) with **(this type of support)**

I-CAN Scoring Steps



1. DESCRIBE



2. IDENTIFY



3. SCORE

Describe I-CAN Statements

Using the 'I-CAN' formula:

- John can take his regular medication when his support staff put his pills out with a glass of water with his breakfast and dinner.
- Sandy can participate in shopping when she has her visual menu planner. Sandy matches the pictures on her planner to the items in the store at Coles and will place them in the trolley. Sandy will ask her support worker for assistance if she is unable to reach the item on the shelf. Sandy can purchase the items using her debit card with prompting support from her support worker.
- Keith can take the clean laundry to his bedroom when staff put the clean clothes on Keith's trolley and let him know that its time to put the clean laundry away.

I-CAN Scoring

Toileting

Harriet can manage her toileting needs with 1:1 support.

- Is this an I-CAN statement?
- How would you score the frequency?
- How would you score the type of support?

Activity: I-CAN Statement

You have 5 minutes to write your best I-CAN statement/s for Sally based on the below information taken from her Functional Assessment Report:

For dressing tasks, Sally typically waits for staff direction, indicating a need for external prompting and guidance. She has the capacity to complete dressing tasks whilst seated. With prompting, she is able to choose her clothing.

Ongoing supervision and prompting are required to ensure the appropriateness of her clothing choices based on the weather, the occasion, and cleanliness. This need for guidance also reflects potential impairments in judgment and understanding of social norms and environmental cues.

Sally will independently put on her pyjamas without prompting, suggesting some level of functional independence in familiar and less demanding contexts.

Assessment Preparation

Key Steps:

- Obtain consent
- Establish who are the key informants that need to be involved in the assessment
- Provide information to the participant about the purpose and process of the I-CAN assessment
- Gather personal and contextual details (identify sensitive topics)
- Gather relevant background information and reports
- Pre-populate sections of the assessment report with information obtained (ensure details are fact-checked during the assessment)

Importance of Preparation

Why preparation matters:

- Ensures adequate information is gathered and accurate scoring
- Builds trust and rapport with the participant
- Supports a smooth, person-centred assessment process

Impact of not preparing:

- Insufficient information gathered – leading to incorrect scoring and support recommendations
- Participant distress – confusion, frustration, or disengagement
- Missed goals – failure to capture aspirations and needs

Case Study: Cognitive Disability and Communication Support Needs

Olivia is a 58-year-old woman with intellectual disability, Pica, and dysphagia. She lives in shared supported accommodation with eight other residents. Olivia is non-verbal and communicates through gestures, vocalisations, and body language. She enjoys music, walking in the garden, sitting in the sun, puzzles, and arts and crafts.

Activity: Pre-populating Information

Using Olivia's One Page Profile and Occupational Therapy Functional Assessment Report:

- Write a person-centred, strength-based paragraph about Olivia for the About Me section of the I-CAN
- Identify which sections of the I-CAN you could pre-populate information in using the background information?
- Group discussion – Share 'About Me' examples with the group

What is Augmentative and Alternative Communication (AAC)?

AAC refers to methods and tools that support communication for people with speech or language difficulties.

- **Augmentative** – Adds to spoken language
- **Alternative** – Replaces spoken language

AAC strategies include:

- **Unaided** methods like gestures and facial expressions,
- **Aided** methods such as communication books or high-tech devices like speech generating devices, tablets with specialised apps.

Strategies for Non-verbal Individuals and AAC

- Always address the person first, even if responses come via AAC or support person.
- Confirm understanding by repeating back what you interpret.
- Use visual supports (pictures, symbols, communication boards).
- Allow extra time for responses.
- Ask yes/no questions if appropriate, but balance with open-ended prompts.
- Collaborate with support workers familiar with AAC device settings and to clarify responses if needed
- Check if the person uses low-tech AAC (e.g., picture cards) or high-tech AAC (speech-generating devices).
- Avoid rushing - respect the person's communication pace.

Examples of Adapted Open-Ended Questions

“What activities do you enjoy?”

Show pictures of activities (e.g., walking, music, puzzles) and let the person point or gesture.

“What would you like to do more often?”

Use a choice board or AAC device with options like “go outside,” “listen to music,” “visit family.”

“How do you like to spend your day?”

Present a visual schedule and ask the person to indicate preferred parts.

“What helps you feel comfortable?”

Use yes/no cards or symbols for things like “quiet space,” “music,” “favorite chair.”

“What is important to you?”

Offer images of family, friends, hobbies, and let the person select or gesture.



Using Visual Aids and Simplified Language

Why is this important?

- Enhances Understanding
- Promotes participation
- Ensures Accuracy
- Supports Person-centred Practice
- Reduces Distress and Risk

Involving Family and Key Informants in Assessment

Why It's Important:

- Provides accurate, holistic information about the person's needs and preferences.
- Ensures person-centred planning when the participant is non-verbal or uses AAC.
- Helps identify goals, routines, and sensitive topics that may not be evident during the assessment.

How to Involve Them:

- Invite family and key informants to attend the assessment in person.
- If they cannot attend:
 - Link them via Teams or other video platforms during the session.
 - Contact them prior or after the assessment for input and clarification.

Interview Considerations

Thinking about the case study, Olivia:

- How would you set up the environment?
- How would you start the assessment?
- What open-ended questions could you adapt for non-verbal communication?
- How would you involve her support workers while keeping Olivia at the center?

Activity – Interview Practice / I-CAN Statements

- Work in groups of 3-4 to practice interviewing:
 - Person 1: Olivia (participant) and her service coordinator, Sophie
 - Person 2: Assessor
 - Person 3-4: Recorder
- Use open and closed questions to gather information about Olivia's self care or communication supports
 - Draft 2–3 I-CAN statements for Olivia using the information obtained
 - Focus one or two subdomains in the self care or communication domain
- Share your statements with the group
- Discuss challenges and strategies

I-CAN Scoring Steps



1. DESCRIBE



2. IDENTIFY



2. SCORE

Identify and Score I-CAN Statements

Ava can self-feed using a teaspoon, modified bowl and anti-slip mat with her family and support workers following the mealtime management plan to ensure her feeding safety. This includes ensuring that the foods are of a level 5 texture, and that Ava is correctly positioned, alert throughout the meal, and provide prompting to eat slowly.

Activity – Scoring I-CAN Statements

- Choose one of your I-CAN statements your group wrote for Olivia
- Focus on either:
 - Self care subdomain, or
 - Communication subdomain
- Use the I-CAN v6 Scoring Manual – use as a reference for scoring
- Score Olivia's support needs based on that statement

What's Next

- I-CAN Assessment and Accreditation process
- Important resources
 - I-CAN v6 Scoring Manual
 - I-CAN v6 Sample report
 - I-CAN v6 Self Assessment Checklist

Questions and Answers



ASK YOUR QUESTIONS



SHARE YOUR INSIGHTS



DISCUSS ANY
CHALLENGES



I-CAN v6 Workshop 2

Cohort Focus: Person with physical disability

Domain Focus: Mobility / Physical Health

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Acknowledgement of Country

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- Look after yourself, write 'be right back' (BRB) in the chat.



Agenda

1. Welcome and objectives
2. Key component of the I-CAN
3. I-CAN Statements and Scoring
4. How to describe supports for people with progressive or fluctuating disabilities
5. Case Study Introduction - Person with physical disability
 - Practice writing I-CAN statement
 - Practice sessions around scoring I-CAN statements
6. Considerations for completing an I-CAN via telehealth
7. Questions and Answers

Learning Objectives

By the end of this session, participants will be able to:

- Explain the key components and purpose of the I-CAN
- Develop skills in writing strengths-based I-CAN statements
- Apply the scoring system accurately across domains
- Analyse a case study involving physical disability to determine appropriate support needs
- Accurately document support needs in the I-CAN report for people with progressive or fluctuating disabilities
- Understand the key strategies for completing I-CAN assessments via telehealth

Welcome and Introductions

- Introductions
- Pre-workshop documents
 - Case Study: Tom Thomas – About Me, I-CAN Scoring Activity
 - I-CAN v6 Scoring Manual
 - I-CAN v6 Scoring System
 - Allied Health Professions Australia - Telehealth Guide for Allied Health Professionals & Checklists for Clients and Clinicians

The Core of the I-CAN

- The success of the I-CAN relies on the use of the strengths-based statements.
- The 'I-CAN formula' is key for producing strong, clear, strength-based statements.
- As your confidence grows, the structure will become more natural, and you may not need to use the formula word-for-word – but the same principles still guide your writing.

I-CAN Formula re-cap

(name) can (do what) with (this type of support)

For example:

John can take his regular medication when his support staff put his pills out with a glass of water with his breakfast and dinner.

Describe - I-CAN statements

Using the 'I-CAN' formula:

- Simon **can** make a hot drink when the tipping kettle has been filled to hold 1.5 cups of water by a carer and the items Simon needs are left in a position that Simon can reach.
- Omar **can** take his dog for a walk when he a carer puts the dog on the lead and hands the lead to Omar. He can manage when the carer accompanies Omar and assists Omar to care for his dog when out in the community, and takes the dog off the lead and places him in the backyard on their return.
- Lily **can** shower every morning in her accessible bathroom, when she is seated in her shower commode chair, all the items she needs are positioned within reach and when a carer washes the areas of her body that she is unable to reach.

I-CAN Scoring Steps



1. DESCRIBE



2. IDENTIFY



2. SCORE

Scoring: Frequency of Supports

Frequency of Support



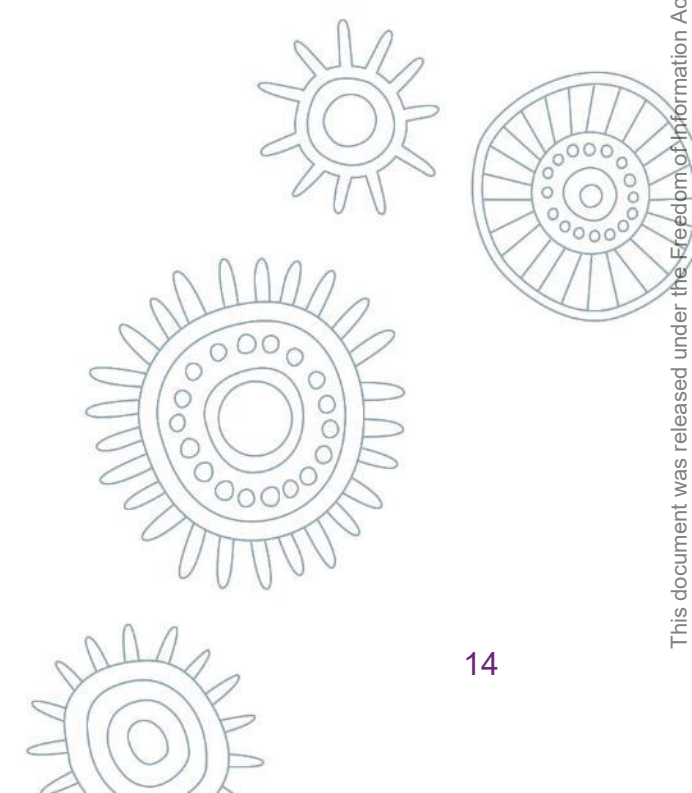
0	Never	No support is required
1	Occasionally	Less than once per week
2	Weekly	1-6 times per week
3	Daily	1-3 times per day
4	Frequently	4 or more times per day
5	Continuously	Consistently throughout the day

Scoring: type of support

	0	Not Applicable	The described support need has been scored elsewhere in the I-CAN, or the domain is not relevant at the time of assessment.
	0	Independent	The person does not need any support.
	1	Managed Independence	This support need is managed through the independent use of aids or equipment e.g. wheelchair, hearing aids, glasses, communication device or a simple strategy such as independently using a checklist or phone reminders.
	2	Minor	The person may need brief or minor support from another person, for example simple first aid, giving a brief prompt or word of reassurance, minor setup or occasional supervision or mentoring, monitoring for signs of discomfort, or brief physical assistance for a minor aspect of the task.
	3	Moderate	The person may need a series of prompts or instructions, reassurance or emotional support or more regular supervision, interpreting or clarifying communication for an unfamiliar communication partner, or physical assistance for some aspects of the task.
	4	Extensive	The person needs extensive support for the majority of or for the entire task, such as hand over hand support, extensive emotional support, intensive communication support including speaking on behalf of the person, input or assessment by health care professional, or close supervision/monitoring. Alternatively, this task is completed wholly for the person, for example external financial management or guardianship.
	5	Pervasive	The person needs the direct simultaneous support of two or more people, such as a 2:1 hoist transfer or 2:1 response to behaviours of concern such as administering PRN.

I-CAN Scoring- things to remember

- Score the highest cumulative support
- Duplicate scoring
- Never/not applicable
- Scoring of goals – making sure the goal has a support need to score



Activity 1 – Scoring I-CAN statements and goals

- Review and score the 6 I-CAN statements and goals on the next 2 slides
- Use the I-CAN v6 Scoring Manual – use as a reference for scoring
 - What is the Frequency of Support?
 - What is the Type of Support?
- You have 10 minutes and then we will review as a group

I-CAN Scoring

Score the following I-CAN statements:

1. Transfers & Positioning: Emma can transfer between her bed and her wheelchair, and between her wheelchair and the toilet, and her wheelchair and her tilt tub water chair, with the support of two support workers and a hoist. Emma transfers at least 6 times a day.
2. Transfers & Positioning: Sam can manage all transfers with the use of rails, arm rests. He can transfer on/off his bed, shower chair, utility chair, toilet, lift recline chair and into/out of a vehicle.
3. Walking & Moving: Pete can use his wheelchair to move around the home environment, using his feet to self-propel. He can access the community 4 times per week when staff propel his wheelchair.



I-CAN Scoring

Score the following I-CAN goals:

4. Community, social & civic life: Tom to be able to use his iPad to activate his TV and choose what to watch. Tom to be assessed by an Occupational Therapist to review his technology options to control his TV.

5. Mobility Goal: Mia will work with her physiotherapist each week to improve her safe mobility and community access by increasing her lower limb strength, enhancing balance, and reducing her risk of falls.

6. Physical Health Goal: Olivia would like to maintain good hydration and nutrition to support her skin integrity and assist with her pressure injury management. Olivia to be assessed by a dietitian every 6 months, with a personalised Nutrition Plan developed and implemented by Olivia and her support workers.



Fluctuating or progressive conditions

- Describe what changes, how often, and how long support needs fluctuate.
- Note episodic patterns (days/weeks/months) in the subdomain.
- Outline all supports used during different phases.
- Estimate how much of the year each support is required.
- Score based on the highest cumulative support need.
- Document short-term higher support needs in the description.
- For progressive conditions, note recent changes and expected future needs.

Fluctuating condition – Example I-CAN Statement

Dave can mobilise safely with his 4 wheeled walker with regular supervision to ensure his safety. During winter and times of illness, his mobility may temporarily reduce, and he can mobilise with support using an attendant-propelled wheelchair. These episodic periods typically last for approximately 1-2 months, after which Dave is usually able to return to his baseline mobility once his health improves or the weather becomes warmer.

Progressive conditions – Example I-CAN Statement

Sam can manage soft, minced foods and thickened fluids safely with supervision and support from his carers, who assist with pacing, safe-swallow strategies, and monitoring for signs of fatigue. During periods of deterioration, Sam can maintain his intake with increased support, including spoon-feeding, additional time, closer supervision, and assistance to reduce aspiration risk, as well as supplements to support his nutritional needs. These episodes are occurring more frequently, 2-3 times per week, and his Speech Pathologist, Jenny Smith, has indicated that he is likely to require more intensive support over time, including possible transition to alternative feeding methods.

Case study: Physical Disability Support Needs

Tom is a 53-year-old man with a spinal cord injury at level C6/7 result in quadriplegia and other health related conditions. He lives in Sydney with his wife, Maisie, and their dog, Buddy. Tom has two adult children. Daniel, who lives in Newcastle, and Sophie, who lives in Launceston, and he maintains regular contact with both.

Tom enjoys a range of community activities, including going to the movies, doing the grocery shopping, and socialising with friends and family. He is an avid sports fan, following the Sydney Swans in the AFL and the Cronulla Sharks in the NRL. On Sunday mornings, he likes to listen to Macca on the radio and often tunes into The Conversation Hour during the week.

Activity 2 – I-CAN Statement

You have 5 minutes to re-write this into an I-CAN statement using the I-CAN formula:

Tom is unable to eat independently due to reduced hand function and fatigue. He requires lightweight cutlery and can only drink from straw. Carers need to place the cutlery and his thermal insulated mug in his hand as he can't do this independently.

Once completed, feel free to post in the Teams chat function or you can you feedback to the group.

Activity 3 – I-CAN Scoring

- Work in groups of 5-6 people to score the subdomains for Tom:
 - Groups 1-2: Mobility Domain
 - Groups 3-4: Community, Social & Civic Life Domain
 - Groups 5-6: Physical Health Domain
- These domains were provided in the pre-workshop materials
- Use the I-CAN v6 Scoring Manual – use as a reference for scoring
- You have 15 minutes to score and report back to the group

Telehealth assessments

Key considerations:

- How to engage with your participant via telehealth
- Ensure your participant has the technology and appropriate supports for the assessment
- Check your technology prior to assessment, and have a plan if technology fails
- Allow for breaks and have regular check-ins.

Questions and Answers



ASK YOUR QUESTIONS



SHARE YOUR INSIGHTS



DISCUSS ANY
CHALLENGES



I-CAN v6 Workshop 3

Cohort Focus: Person with psychosocial disability

Domain Focus: Domestic Life / Behaviours of Concern /
Mental and Emotional Health

[ndis.gov.au](https://www.ndis.gov.au) |

Acknowledgement of Country

Before we begin, I would like to acknowledge the Traditional Owners and Custodians of the Country on which we meet today, and their continuing connection to land, sea, and community. I pay my respects to their Elders, past present and emerging.

I would like to extend that acknowledgement and respect to any Aboriginal and Torres Strait Islander peoples here today.

Accessibility



There will be questions and answers at the end



Raise your hand if you have any questions



Live Captions are available



An accessible recording will be made available

Housekeeping

- Keep yourself on mute unless speaking
- Raise hand if you wish to speak
- Cameras, turn them on when speaking and introduce yourself.
- Phones, put on silent, take calls if an emergency
- Should you have any connection issues, log out and rejoin meeting
- We will have a 10-minute break halfway through the workshop
- Look after yourself, write 'be right back' (BRB) in the chat.



Agenda

1. Welcome and objectives
2. I-CAN Re-cap and Scoring
3. How to document behaviours of concern or mental health support needs
4. Case Study Introduction - Person with psychosocial disability
 - Review About Me and I-CAN statement
 - Review scoring of I-CAN statements
5. Managing discrepancies in reported support needs
6. Identify and document risk factors sensitivity
7. Assessing with trauma informed lens
8. Questions and Answers

Learning Objectives

By the end of this session, participants will be able to:

- Describe the purpose and structure of the I-CAN support needs assessment.
- Document behaviours of concern and mental health support needs using person-centred language.
- Write and score I-CAN statements accurately through case-based practice with a psychosocial disability example.
- Recognise and manage discrepancies in reported support needs across sources.
- Identify and record relevant risk factors with appropriate sensitivity.
- Apply trauma-informed principles when assessing support needs.

Welcome and Introductions

- Introductions
- Pre-Workshop documents
 - I-CAN Workshop 3 – Pre-Workshop Activities
 - I-CAN v6 Scoring Manual
 - I-CAN v6 Scoring System
 - Trauma Informed Practice resources

I-CAN Re-cap

- The success of writing a good I-CAN report is dependent on the accurate and consistent use of strengths-based statements.
- The 'I-CAN formula' provides a clear structure to produce clear, concise, strength-based statements.
- With increasing confidence, the writing style will feel more natural. The formula may not be used exactly as written, but its foundational principals will still inform the development of each statement.

I-CAN Formula

(name) can **(do what)** with **(this type of support)**

For example:

Sarah can **prepare her lunch** independently when **ingredients are set out on the bench** and her support worker provides **step-by-step verbal prompts**.

I-CAN Steps



1. DESCRIBE



2. IDENTIFY



2. SCORE

Describe – I-CAN Statements

Using the 'I-CAN' formula:

- Simon **can** manage feelings of anxiety when a support person provides a calm, predictable environment, checks in using simple prompts, and prompts Simon use his pre-taught breathing strategy. Simon can maintain engagement in daily activities when he is offered reassurance and the space to regulate at his own pace.
- Omar **can** participate in community activities four times per week, when a support person prepares him with clear expectations and accompanies him. He can manage distress-related behaviours (e.g., pacing, raised voice) when the support person provides reassurance and guidance to move to less busy environments, stays close, and assists him to transition safely back home when he becomes overwhelmed.

I-CAN Statements

Using the 'I-CAN' formula:

- Lily **can** complete her morning routine each day when a support person provides gentle prompts, prepares the environment, and helps her initiate each step. She is able to shower when she feels emotionally supported and when the carer provides encouragement, maintains her privacy, and assists her to continue when low mood or fatigue impacts her motivation.

Case study: Psychosocial Disability Support Needs

Nicola is a young woman currently living in a refuge after a period of significant instability at home. Before entering the refuge, she experienced frequent hospital admissions following suicide attempts, many of which occurred after arguments with her parents.

Nicola enjoys watching TV shows like 'The Summer I Turned Pretty' and 'Gossip Girl'. She has plans to do a 'euro summer holiday' once all her friends have saved up enough money. Nicola is now approaching the end of high school. She feels excited about finishing and the possibilities ahead, but she is also anxious about losing the structure and consistency school has provided during a very difficult period in her life.

Despite these challenges, Nicola is a fiercely loyal and determined young woman. She enjoys spending time with her friends, listening to music, and exploring the outdoors. She has been diagnosed with Major Depressive Disorder and Panic Disorder, both of which impact her daily functioning and her ability to manage stress and changes in routine.



Activity 1 – Review the About Me description

- Open the About Me description you completed in the pre-workshop activity.
- Review your description:
 - Is it person-centred?
 - Does it describe the person in a strengths-based way?
 - Does it outline what they like doing or an important quality about them?
 - Does it avoid describing disability or medical conditions?
- You're welcome to share your description in the Teams chat.
- An example of how it could be written will be posted in the Teams chat.

Activity 2 – Review the I-CAN Statement

Cleaning & Domestic Tasks:

Nicola struggles to keep her house clean and needs daily reminders because she doesn't maintain basic cleanliness on her own, especially when she is depressed. She usually lets dishes pile up overnight and can only manage to clean them in the morning if she happens to have enough energy. Nicola doesn't have good routines and becomes easily overwhelmed by simple household tasks. She also doesn't think she can manage hanging clothes on the line or remembering to take them down when she is unwell and uses the dryer instead.

Activity 2 – Review the I-CAN Statement

- Open the I-CAN statement you completed in the pre-workshop activity.
 - Does your I-CAN statement use the I-CAN formula?
 - Does it describe the frequency the support is provided?
 - Does it describe what type of support is provided e.g. supervision, verbal prompting, physical assistance?
- You're welcome to share your I-CAN statement in the Teams chat.
- An example of how it could be written will be posted in the Teams chat.

Scoring: Frequency of Support

Frequency of Support



0	Never	No support is required
1	Occasionally	Less than once per week
2	Weekly	1-6 times per week
3	Daily	1-3 times per day
4	Frequently	4 or more times per day
5	Continuously	Consistently throughout the day

Scoring: Type of support

	0	Not Applicable	The described support need has been scored elsewhere in the I-CAN, or the domain is not relevant at the time of assessment.
	0	Independent	The person does not need any support.
	1	Managed Independence	This support need is managed through the independent use of aids or equipment e.g. wheelchair, hearing aids, glasses, communication device or a simple strategy such as independently using a checklist or phone reminders.
	2	Minor	The person may need brief or minor support from another person, for example simple first aid, giving a brief prompt or word of reassurance, minor setup or occasional supervision or mentoring, monitoring for signs of discomfort, or brief physical assistance for a minor aspect of the task.
	3	Moderate	The person may need a series of prompts or instructions, reassurance or emotional support or more regular supervision, interpreting or clarifying communication for an unfamiliar communication partner, or physical assistance for some aspects of the task.
	4	Extensive	The person needs extensive support for the majority of or for the entire task, such as hand over hand support, extensive emotional support, intensive communication support including speaking on behalf of the person, input or assessment by health care professional, or close supervision/monitoring. Alternatively, this task is completed wholly for the person, for example external financial management or guardianship.
	5	Pervasive	The person needs the direct simultaneous support of two or more people, such as a 2:1 hoist transfer or 2:1 response to behaviours of concern such as administering PRN.

I-CAN Scoring - Things to Remember

- Identify all the supports & score the highest cumulative support
- Be care not to duplicate scoring
- When to leave domains blank or use Independent or Not applicable
- When writing goals, make sure the goal has a support need to score
- Remember to score the support being provided not the frequency of the activity / task is completed.

Activity 3 – Review I-CAN Scoring

- Open the I-CAN Scoring task you completed in the pre-workshop activities.
 - What is the Frequency of Support?
 - What is the Type of Support?
- You're welcome to share your scoring for each I-CAN Statement in the Teams chat.
- The scoring for each I-CAN Statement will be posted in the Teams chat.
- We will now review and discuss the scoring for each I-CAN Statement.



I-CAN Scoring

1. **Cooking:** Isla can prepare simple meals in the evening when a support person sets out ingredients, offers step-by-step guidance, and reminds her to use her coping strategies if she becomes anxious or overwhelmed. She can complete tasks with reassurance and clear structure.
2. **Shopping:** Maria can complete a short shopping trip twice a week when a support person helps her plan the list, accompanies her, and provides reassurance and grounding cues when she starts to feel overwhelmed. She can remain engaged when transitions are slow and predictable.
3. **Cleaning:** Ella can complete dishes and light tidying tasks when supports are aligned with her higher-energy periods in the morning. She manages more independently when the task is short, structured, and supported with gentle reminders to help her overcome low motivation linked to her depressive symptoms.



I-CAN Scoring

4. Community, social & civic life: Owen can participate in community activities 3 times per week when accompanied by a support person who helps him recognise risk and provides gentle prompts. He can manage impulsive running, shouting, or property interference when transitions are gradual and when he is given clear expectations and opportunities to take breaks.

5. Disruptive or Offensive Behaviour: Sofia can interact safely with others when she receives frequent monitoring and extensive emotional support throughout the day to recognise early physical signs of panic, escalating fear and emerging aggression. She requires staff to maintain distance and use trauma-informed de-escalation strategies, as outlined in her Positive Behaviour Support Plan, during periods of escalation. Sofia needs frequent prompting and calm reassurance, especially during transitions or unexpected changes. She re-establishes safety more effectively when provided with extensive support and protected space to regain control.

Documenting Behaviours of Concern & Mental Health Needs

Use respectful, neutral, non-judgemental language

- Focus on what supports the person needs, not what they “fail” to do.
- Describe observable behaviours, not interpretations.
- Reference the person’s Positive Behaviour Support Plan
- Highlight existing strengths, coping strategies, preferences, and what works well.
- Link the behaviour to what support enables safety, wellbeing, and participation.

Example:

Instead of “*Sam becomes aggressive when overwhelmed*” →

“Sam communicates distress through raised voice and pacing when sensory input is high.

He benefits from quiet environments and predictable routines.”

Managing Discrepancies

Acknowledge and explore differences

- Recognise variation between self-report, carer report and clinician report.
- Ask clarifying questions (e.g. “Talk me through how you do that task?”).
- Document discrepancies factually (e.g., “carer reports... participant reports...”).

Use a balanced, transparent approach

- Consider context: environment, time of day, existing supports.
- Note patterns across sources rather than determining who is “right”.
- Recognise lived experience while considering cognitive/psychosocial factors.
- If disagreement remains, record both perspectives and score the higher support need.
- Set goals to review or reassess areas of uncertainty.

Examples of Documenting Discrepancies

- David reported he can walk safely indoors without assistance. His support worker, Cindy, reported that David walks safely with supervision and minor guidance to manage his falls risk and balance changes, particularly when he becomes fatigued in the late afternoon.
- Ava reported that she can manage her daily routine independently when she is feeling well and able to stay focused. Her support worker, Jacob, reported that Ava completes her routine with prompting and encouragement, with more frequent prompting on days when her mood is low or when she is feeling overwhelmed.

Identifying & Documenting Risk Factors

Approach risk with care, clarity, and dignity

- Use neutral, non-blaming language.
- Describe risk indicators and context (not labels like “non-compliant,” “dangerous”).
- Document what increases risk (triggers, situations, environmental stressors).
- Document what reduces risk (strategies, supports, relationships, environments).
- Avoid unnecessary detail that may stigmatise, retraumatise, or reduce dignity.

Focus on safety & support needs

- Clearly link risks to required supports, not deficits.
- Highlight protective factors: strengths, routines, trusted people, coping strategies.

Example of Documenting Risk

Mary reported that she enjoys going out independently to visit local cafes and shops twice a week and feels confident navigating familiar routes. Her support worker, Taylor, reported that Mary engages well in community activities when she has support to plan her outings and scheduled check-ins, particularly on days when she is experiencing heightened anxiety or when environments are busy. Recent incident reports outline several occasions where Mary became distressed while alone in the community and a member of the public has driven her home. Based on this information, the behaviour support clinician has recommended a review of Mary's Positive Behaviour Support Plan and to limit her independent outings to her local café only, which is a quiet environment where she is well-known by staff. It is recommended that she has support when accessing other community settings to provide distant supervision and reassurance, if required.

Trauma Informed Assessment: Key Principles

Create Safety - Calm, predictable environment; explain what to expect.

Build Trust - Clear purpose, transparency, choice.

Use Strength-Based Language - Respectful, accessible communication.

Recognise Trauma Responses - Behaviours may reflect trauma, not “non-compliance.”

Adapt to Disability Needs - Adjust pacing, communication, and support.

Questions and Answers



ASK YOUR QUESTIONS



SHARE YOUR INSIGHTS



DISCUSS ANY CHALLENGES

We Welcome Your Feedback

Please complete the survey

