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DONNA:

Have you ever had that experience where you are away from work for a couple of days and you come back to find that you have been nominated to do something that you know nothing about? Wednesday night at 10 PM, I had an email from my divisional manager to say "Guess what? You have been chosen!" So I put this presentation in that context. I am fairly new at Ability Options and I have been there for seven months and the self managed programs at Ability Options have been running for four years. Essentially, in doing some preparation for this presentation, I was trying to find some articles around what are the implications for the workforce, generally, in terms of individualised funding, or personalisation as they call it in the UK. And there is not a whole lot out there, I have got to say to you, around implications for the workforce. There is some anecdotal evidence around increasing the casualisation of the workforce, there are some concerns about deskilling, disability support workers, extending to other training issues and also in a report in 2007 in the UK, it talks about the high rate of turnover of staff in individualised funding packages. So in that context I will talk about Ability Options experience. And it is going to be a very brief glimpse into our programs and the workforce at Ability Options that are not direct service providers or direct workers associated in a centre at Ability Options. We are quite new, four years running self managed programs in terms of other states and countries, we are at the beginning of our journey. In NSW however we are at the forefront of looking at self managed programs. So wherever you come from, please take this presentation also in the context of that experience.

I wanted to give you briefly an overview of the self managed programs at Ability Options. We have four programs, the first is 'Early Start, My Plan, My Choice'. It is a pilot program that's been running for two years, it's an early childhood intervention program. So children 0-6, prior to school, come into our program. We have had 20 families last year and we have 20 this year. The families get a package around \$8,000 to spend over a calendar year.

Our community participation, self managed program has been running for four years. It started in about 2007, a pilot of two years. It is post school. So kids leaving school, 18-25, it is the old post school options program, I guess. It is not centre-based, it is self managed. Packages that people receive range from between about \$22,000 to about \$56,000. It is a recurrent funding package and to be used for community participation. To find valued roles in the community, the move from school to adulthood, for education and skill development.

The 'Life Choices' package, I believe it is still under pilot. I have yet to determine that. There are different answers each time I ask this. 'Life Choices' is again a self managed package. The ages for 'Life Choices' is 26 to about 55. Presently we get referred - people are referred to us by case workers in ADIC. The packages range from about \$12,000 to \$26,000 that people have to spend. And the last program we run is 'Active Ageing'. Again, it is 56 or 55, I think, through to about 64. We don't know what happens for people after 64 but we presume that 'Active Ageing' program continues.

Essentially, Ability Options is a financial intermediary. We are the banker. We receive some money. The packages that families or individuals receive, we take an administration fee which covers the financial, legal and administrative costs of supporting people in these packages. Generally across the four packages, the administration fee is 12%. Except for 'Early Start', which is 10%. The key features of Ability Options self managed programs, like any other individual funding package, it gives control to people with disabilities and their families. Individuals are able to tailor their own program with the assistance of identified significant others like family members and together they articulate a vision, they develop some goals for the program and then they develop a personalised plan that's flexible and it is as creative as they are really.

Each participant in our program, an allocated individual consultant is given to each participant. This consultant assists in developing the individual plan based on person-founded principles if needed. They

provide one-on-one mentoring and guidance to set up the program if needed. They ensure the program fits within the funding guidelines. They also review and maintain their program and they connect - this is really important in terms of workforce - they connect individuals to other parts of our organisation, so to HR Services or to Accounts. We also run seminar programs as part of our self managed programs. These - they provide interactive training on self management, on HR, on lots of issues for families and individuals, they provide networking opportunities for people and are run quarterly in Sydney and in regional areas.

It is really important to have financial transparency within our program, basically people are given monthly statements, we send out monthly statements that are in line with their budgets that are prepared with consultants at the set-up of the program. We also provide HR support. So this is where we start to get into some of the workforce issues. Our HR department assists individuals with self managed packages to recruit their workers, recruit people to support them in their programs. So the kind of support that HR would be engaged in could be in advertising, both writing and posting, involved in the interview processes, involved in the screening processes, police checks, reference checks, doing the paperwork and offering advice on HR issues, including issues to do with termination.

So that's the background of Ability Options self managed programs. Where does it sit in terms of the rest of the organisation? We have been providing services to people with disabilities for over 30 years in NSW. Apart from self managed programs, we offer employment programs, accommodation and respite services, and we run a wholesale nursery. Looking at those figures, you can see that the workforce in our self-managed programs make up 34% of our overall workforce in our organisation.

We have 165 individual programs in our self-managed program, or 165 participants, in contrast we provide services to over 2,500 people. On average, out of the 165 individual packages, 90 of those individuals would employ staff and they average 2.2 staff members each. The figure that you will probably find supportive of some of the anecdotal evidence, 94% of the employees employed in our self-managed programs are casual employees. There are 12 out of 198 self-managed employees who are actually permanent part-time, where families have chosen to employ permanent part-time people. In terms of the overall individual funding packages, 64.5% of an individual's funding package is generally spent on employing staff. So it's a strong commitment to employment of staff to assist people with disabilities to achieve that.

I put up workforce age profile and unlike Elaine's workplace, we have people in the self-managed program who are employed who range from 15 through to over 65. You can see that there is a good distribution across the ages and the numbers sit where you would expect them to sit in terms of employing support for people with disabilities. Unlike the attendant care packages in NSW, family members can be employed in our self-managed program and while this is the case, the number of family members currently employed by individuals in their self-managed programs remains very low.

The turnover rate. What's the turnover rate for the employees in self-managed? Quite a surprising rate. It is almost half the industry average, currently it sits at about 8.6% in the self-managed program. There are obvious positives arising out of this. So stable workforce, committed workforce, reduced recruitment and training costs. When we look at some of the potential reasons for the retention rate of staff, it makes a lot of sense. Staff in our self-managed packages are more often recruited by the person or their family in a more personalised process. It is one-on-one. More often than not, staff are recruited from the individual's own networks or associates. So they are known to each other prior to entering into the employment relationship. Staff are also recruited to assist an individual to meet specific goals so the job role is more defined. It's not a master of all trades, it is kind of a master of one specific area generally. Staff are working with one individual, one person. Their loyalties and commitments develop much more quickly than if they were working in an organisational situation. There is potential for less occupational stress in a self-managed program and people are often engaged to support people with

disabilities in their individual programs because of their own personal interests and passions. For instance, some people might want to learn the guitar, so you find someone who is passionate about music and is able to teach someone to play the guitar.

There is anecdotal evidence in our program at present that people stay on in their job because of satisfaction and they are making a difference to an individual's life.

Workplace injuries has always coupled up as a point of concern in most organisations. If you look at the graph and if you take into consideration that there is 34% of our workforce in Ability Options are employed in the self managed program, this is an extraordinary statistic in terms of workers compensation and workers injury. In the four years of running the four programs, there has been one workers compensation claim in our self-managed program. And it is quite extraordinary given the range of roles undertaken by staff with a diversity of individuals, whose support needs vary from moderate to complex and challenging. This state highlights the positive outcome involved in two parties working in partnership together. The skill management consultants work in partnerships with parents and families to set up a very solid working plan of support that details clear interventions that keep everyone safe. It brings together the commitment of relationships that family members or individual advocates have with the person with sound organisational structure to achieve a valued and desired outcome.

In the early days of the program, consultants provide clear information to those managing HR issues, they also provide information on OH&S and risk management protocols. Our consultants act as trouble shooters between HR and families as they are needed. We have a little interview, or several interviews happening over the last few weeks with families and individuals. We asked them what they thought about workforce and what were their main concerns about the workforce for them in individual programs and there were four main things that emerged.

They talked about recruitment and their main concern was that when recruiting support staff or people to support them in their activities, that interest, talents and strengths of the support person are matched to those of the person with the disability. Makes a lot of sense but sometimes we forget the basics. Families in the UK, I think the report was that 7% of families with individualised funding invested in training four support workers and that is an ongoing concern and one of the big issues in the move to individualised funding. I have to say that every family and every individual with a disability that we spoke to, training was a big priority for them. And families in particular were insistent that staff were trained and that they were trained specifically in areas to do with the person with the disability.

Again, it makes sense. Families and individuals want to remain safe so they want people to be trained in a manner that will keep them safe in doing the activities that they want to do to achieve a better life.

Interestingly, Elaine said the backgrounds of staff in your organisation, there wasn't such diversity. Our families and individuals with disabilities said they wanted to ensure that support staff come from a variety of backgrounds to ensure that they expand experience of the person with a disability. They were really insistent about this. It has to be a diversity of people.

And here is a big one. Families and individuals said they prefer casual employees because they fit in when and where the person needs them. We talked to the support workers employed in our self managed programs. I need to say that the families or the individuals manage the support workers but legally the support workers are employed by Ability Options. It gets a bit messy but that's how it works. We are the legal employer but the families manage, supervise and often recruit the staff. The support workers, it seems that we conducted a voice survey amongst all of AO and it was very clear that employees in our self managed programs had greater identification with the participant and their family than with Ability Options, they are employed, managed in consultation with

the individual much more than they are with AO and it makes sense they will be connected and with the family much more than the individual a clear orientation to the person being supported.

Now we can look at these issues from a negative perspective and adjourn to conclusions about what this means for our workforce and organisation. Or we can look at it a little differently and somewhat positively by seeing it as an opportunity to explore what this means in terms of our evolution as a service provider in an emerging and changing disability paradigm. Where the focus is the person, not the organisation. And in reality, even though there wasn't a great identification with the organisation, there is a strong connection between Ability Options and the staff in the self managed program which are forged by our employment processes, payroll, reimbursements, the connection between our consultants and the families or the workers. But a place of the organisation where it should be in the background. Essentially a service provider should be unobtrusive but effective in the lives of people with disability. It is not the focus. But it ensures that the programs are successful for people with disability. To me, the fact that people's lives are changing for the better and individuals are reaching towards self determination fits nicely into Ability Options mission and that is to provide people with disabilities better opportunities that will enable them to enhance their lifestyles and achieve their goals.

What sort of training do we give to self managed workers, workers out there working with individuals, essentially we train the trainers, we are putting our self managed consultants through core elements of a training diploma and they train families in core modules around self managing, MR, OH&S and employee relationships.

The consultants then training the families, the families and consultants train the workers, and then the participants and families send the workers to specific training as necessary, epilepsy training, guided incident response, manual lifting; that sort of thing. Through our seminar program, we provide training on lots of issues and we are sure that every family has a reference folder which has in it protocols, check lists, procedures that families get staff to sign off on. Everybody signs off on it basically. Future directions. While we currently have in place some avenues and means of supporting staff engaged in the self managed program, the professional development of this group of employees is a work in progress.

We are going to continue to reflect with you and introduce new new methods of support and training. Online learning, peer support arrangements, self managed staff forums and the use of technology, Skype, video conferencing, those sorts of things. We are currently in the process of developing an intranet, providing online resources such as the policies and procedures to individuals, their families and to staff.

Essentially, our experience of employing and working with individuals and self managed programs, self directed funding, and employing staff has been positive. People's lives have changed for the better because of the individualised funding and the choice that they have. We have seen that participants and families are open to investing in training for their staff. I don't have any concrete evidence of how many of our families are actually trained people. There is a low percentage of workplace injuries and disputes. There is a variety of staff being employed, expanding the overall skills within the organisation and staff turnover rate in self managed programs is lower than the industry average. I have to say that our learning as an organisation over the past four years has been driven by the self managed participants and their families. They help clarify our role as the intermediary as they become more certain of their own direction. At times, what they have had to say to us has been really hard to hear. It challenges the traditional role of us as a service provider but it forces us to expand our vision. I see that partnership is vital. It is vital for success. And a partnership is between the participants, the families, the staff members employed and Ability Options as a service provider or intermediary. Listening is vital for partnerships.

Yesterday, Damien Griffiths talked about listening with a quiet mind. Listening with a quiet mind creates a space for us to hear one another. So the future for us in Ability Options and self managed programs working with families is exciting and challenging. Thank you.

(APPLAUSE)

KERRY:

Thank you very much, Donna. Now does anyone have any questions for Donna? The microphone is coming.

QUESTION FROM FLOOR:

Suzanne from Independence Australia. I just wonder who pays for the training and if it is the client, what happens when the client gets someone trained specifically in epilepsy and then the carer leaves? So then they have to train someone new in that. Are they getting their money's worth? That's what I'm trying to find out.

DONNA:

Currently, families have paid for different types of training but that's a really good question and it's one of the questions that we are in the middle of considering, I guess in the future. We are trying to look at ways of - I guess sharing the cost or finding funding as an organisation to pay for the cost of training. But I guess it is the same issue for organisations isn't it, investing in training and staff move on.

QUESTION FROM FLOOR:

(Inaudible)

DONNA:

Yes, they do. And I guess sometimes at our seminar programs, we invite experts and different people in with different expertise in the field to come and present at seminar programs, and families who want that kind of training or information would come to our seminar programs. But it's a question that - it is an issue we are continuing to explore but it is a really good question.

QUESTION FROM FLOOR:

You mentioned you take only 10% for the package or programs and 1% for the other. Now how do the consultants get paid? That doesn't seem to be a great percentage that you are taking for organisational business.

DONNA:

The financial sustainability of these programs is again another question for exploration for the organisation. The consultants are paid out of the 12%.

– END OF TRANSCRIPT.

