



# Communications and Engagement Plan

## Scheme Reform and Independent Assessment

### Purpose

On 4 May 2021 the Agency committed to the *Joint Standing Committee on the inquiry into NDIS independent assessment* that we would explain to the Committee the Agency's practical steps and new communications strategy to ensure improved consultation about Scheme Reforms, including independent assessment.

This commitment recognised that while the Agency's previous independent access, planning and Early Childhood Early Intervention consultations resulted in 769 submissions, the community and sector were greatly concerned that the Agency consulted about *implementation* of independent assessment, whereas the community and the sector sought input into some key *design elements* of the reforms.

This *Scheme Reform and Independent Assessment Communications and Engagement plan* outlines the new strategy and practical steps to better implement consultation about Scheme Reforms, including input into improving the design of key features of the independent assessment process.

It is an integrated strategy to:

- **Reset the communications and engagement approach** to Scheme Reform to support the Minister's consultative approach and enable consideration of potential refinements or improvements to the independent assessment process/ Consultation will be primarily undertaken through the Independent Advisory Council (the Council) led workshops and State and Territory disability advisory councils.
- **Clearly explain and evidence** the inequities in the current planning and decision-making processes and the cost pressures and growth trajectory the NDIS faces.
- **Create a month-by-month integrated engagement and activity schedule** wrapped around Ministerial round tables to support progression towards Disability Reform Minister's Meeting (DRMM) on 6 August 2021.
- **Undertake targeted engagement** with key stakeholders to design agreed elements of access and planning processes including independent assessments which inform participant and sector understanding of the need to ensure consistent and fair decision-making, enable the benefits of plan flexibility and increased choice and control and secure the Scheme's longevity and affordability.

# Current state

## Key concerns with independent assessment – consultation papers

The Agency has reviewed the submissions to the recent consultation process and has outlined 8 themes which will inform the Council-led consultation process.

### Agency themes for consultation

	Area	Example issues for consideration
<b>Independent Assessment Focus themes for consultation</b>	1. Exemptions and alternatives to the process where required	<ul style="list-style-type: none"> <li>How to gather consistent, structured data to inform decision-making if               <ul style="list-style-type: none"> <li>IA is likely to cause harm</li> <li>Individual does not have a support person to help complete the IA</li> <li>Others?</li> </ul> </li> </ul>
	2. Choice of assessor and how appointments are booked	<ul style="list-style-type: none"> <li>Process taken to select the assessor used to complete the IA</li> <li>Method and approach to appointment booking and management</li> </ul>
	3. The conduct and experience of the assessor	<ul style="list-style-type: none"> <li>Expectations on conduct (Service Charter engagement principles)</li> <li>Ensuring assessors understand functional capacity needs of individual</li> <li>Improving how to communicate process and outcomes from the IA process</li> </ul>
	4. Use of pre-existing participant information	<ul style="list-style-type: none"> <li>What information could be provided to the assessor (before, during, after the assessment)</li> </ul>
	5. Checks, inputs, and reviews before the assessment is used for decision-making	<ul style="list-style-type: none"> <li>How could an individual review, and provide input to an IA (at what level of detail, in what format)</li> </ul>
	6. Ongoing oversight, evaluation, and improvement of assessment tools and systems	<ul style="list-style-type: none"> <li>Ongoing governance and review of IA approach (via IAC)</li> <li>Evaluation approach of use of IA and decision-making outcomes</li> <li>Pathway to create a simpler, bespoke NDIA tool (with more experience)</li> <li>Engagement with disability sector to improve communication tools/training</li> </ul>
<b>Additional Planning themes</b>	7. How funds are managed in a plan	<ul style="list-style-type: none"> <li>How much funding would be available to a participant in their plan ("interval") (1 month, 1 quarter, etc)</li> <li>How would this funding roll-over between intervals, or between plans</li> <li>How pre-payment, bulk purchasing, or long-term commitments work</li> </ul>
	8. Plan adjustments in unique circumstances	<ul style="list-style-type: none"> <li>Life stages – what are they, and what happens</li> <li>Urgent situations – emergency, use of entire plan</li> <li>Rapidly deteriorating and life limiting conditions</li> </ul>

## Stakeholder and sector sentiment

People with disability and the sector have demonstrated strong, orchestrated opposition to Scheme Reforms, particularly independent assessments, arguing either that we should not progress or that they should not be mandatory. There are ongoing risks if the Agency is not seen to have made changes in response to concerns raised in the consultation.

Sentiment has decreased with some stakeholders moving from neutral to negative as further details of the reforms have been released or with increasing dissatisfaction of scope of consultation.

In addition to these areas the Agency identified through the ongoing engagement process, there are 3 key participant and sector concerns at national sector, state and territory and community level.

We need to carefully consider and where possible align the Agency and the community and sector view of key concerns to ensure policy adjustments as well as communication and engagement address these concerns.

### 1. Evaluation of the second independent assessment Pilot – evidence of outcomes of independent assessment

- Request for an evaluation of the end-to-end process including Personalised Budget outcomes
- Evaluation undertaken independently and publicly available
- Data and assumptions underpinning personalised budget model

### 2. Quality Assurance of independent assessments – trust in process

- How can additional information be provided before, during and after an independent assessment has been completed for delegates to consider prior to draft budget
- Accessible review mechanism to ensure people can seek amendments if summary of independent assessment does not provide an accurate outline of their function, environmental and social circumstances (prior to approved plan)
- Selection of assessor to align to impact of disability (best fit)

### **3. Expanded assessments and tools – to minimise genuine exemptions**

- Choice of free independent assessments, or
- Option for people to engage their own allied health practitioner to conduct the assessment
- Additional fit-for-purpose tools to enable people with complex needs or circumstances, people without formal support and people from diverse communities to have confidence in independent assessment capture of accurate information about their circumstances

## **Ministerial pause of independent assessment legislative process**

Upon taking up her portfolio for the NDIS in April 2021, Minister Reynolds announced a pause of the independent assessment legislative process to enable the Government to review feedback from the independent assessment second pilot, currently underway. The Minister also committed to a series of roundtables to understand concerns expressed by participants, community, providers and the sector.

The Minister, the NDIA and the Department of Social Services (DSS) are also meeting with state and territory governments. Minister Reynolds clarified that independent assessment “in some form” will be implemented to address Scheme sustainability and concerns about the consistency and equity of decision making, and to enable plan flexibility and increased choice and control for participants.

To progress Scheme Reform legislation, improve sector and community sentiment around independent assessments and rebuild trust in the NDIS, the Agency must set the direction and approach for additional, multi-level engagement in the timeframe from now until the next DRMM on 6 August. This will focus on consultation to explore potential improvements and refinements to Scheme Reforms, including independent assessments in response to key issues of concern.

The primary mechanism for consultation will be through independently facilitated workshops, led by the Council with invited sector members and with further consultation with State and Territory disability advisory councils.

Council will advise the NDIA Board on agreed improvements and refinements to proposed Scheme Reforms generated from the Council-led workshops, supported by community and sector members.

The Board will provide the final proposed elements for Scheme Reform to the Minister, to enable bilateral discussion and to inform consideration by the DRMM. Following DRMM, DSS will release a communique on the outcomes of the meeting. The next steps for draft legislation about independent assessment and Scheme Reform will need to be considered by the Minister including the timing of public consultation. The Agency will support the lead up and during the public consultation process for the legislation.

## **Scope**

### **Future state – where we want to get to by end July 2021**

- Design and deliver an integrated approach between the Minister, DSS and NDIA to inform stakeholders and respond to issues already raised, then set an agenda for targeted consultation and engagement
- Demonstrate how feedback from access, planning and ECEI consultation conducted recently has been incorporated into current reform design and implementation
- Consult further on design adjustment through Independent Advisory Council – led consultation and engagement. Seeking additional feedback from the sector to inform policy and administrative adjustments and implementation approach on specific components of Scheme Reform.
- The purpose of the consultation and engagement is to:
  - Clearly demonstrate why Scheme Reforms are required to gain community/sector acceptance

- Confirm which aspects of Scheme Reforms, including independent assessment may be considered for refinement or improvement within a targeted consultation framework
- Agreement and recommendations of refinements or improvements to access and planning reforms reached with key sector representatives and the Council, supported by participants, the community, providers and broader sector representatives.
- As per their statutory role the Council advises the NDIA Board of agreed recommendations for refinements or improvements proposed to Scheme Reform.
- NDIA Board considers Council advice and shares with the Minister to inform DRMM consideration on 6 August
- DRMM issues communique outlining next steps which may include endorsing key elements to enhance the NDIS reform legislation and sets the timeframe for the legislation process to begin.

## **Communications and engagement plan road map to future state**

- Set out an integrated communication and engagement plan to support further consultation with selected Sector stakeholders, States and Territory government disability ministers and disability advisory councils and allied health peak bodies.
- Clearly communicate to the disability sector and people with disability before, during and after the Independent Advisory Council workshops on the topics and outcomes under further consultation.
- Create opportunities to identify and build support for solutions to the concerns about Scheme Reforms with the following prominent activities:
  - Publish participant-focused Personalised Budgets Paper
  - Publish projected Scheme costs data in the Quarterly Reports and summary of underlying assumptions
  - Publically position the next phase of consultation through the Council-led 2 day workshop to consult and agree on potential adjustments to Scheme reforms, with follow-up workshops as required
  - Publish an evaluation of the second independent assessment Pilot, noting sector expectations of expanded end to end process and independent evaluation
- Ensure strategic communication and engagement alignment between Minister Reynolds office, DSS and NDIA to allow consistent external messaging and to enable the Minister to present to DRMM in 6 August on the results of these further consultations along with the outcomes of the independent assessment second pilot.
- Support jurisdictions to inform their respective Disability Advisory Councils about Scheme Reform and Independent Assessment consultation process and engage with their constituents to increase awareness of consultation process and outcomes, assisted by NDIA community engagement teams as required
- Support sector, community and provider information and awareness activities
- Support communication and engagement activities to progress the commencement of the legislative process.
- Track and share sentiment:
  - National peak organisation and jurisdictional Stakeholder Sentiment through fortnightly updates,
  - Media sentiment through real time tracking and monthly sentiment
  - Community sentiment through monthly updates.

# Risk matrix

Risk	Mitigation
Sector representatives at IA Council workshop and/or Council members collectively or individually refuse to accept proposed Scheme Reform adjustments and issue advisory media statements	<ul style="list-style-type: none"> <li>• Ensure that Scheme Reform negotiables align with key sector concerns</li> <li>• Summarise discussion and agreed outcomes and accurately capture areas requiring further development to reach agreed outcome</li> <li>• Recommend that IA Council issue communique advising purpose of workshops and next steps, to maintain sector awareness</li> </ul>
Non-IA Council workshop sector representatives feel “outside the tent” and disrupt/create noise around IA discussion process which increases community and political anxiety	<ul style="list-style-type: none"> <li>• Key messages explain why IA Council attendees invited</li> <li>• Recommend that IA Council issue communiques pre and post workshops, promoted via NDIA social and media and with targeted S&amp;T/peaks engagement to maintain Agency commitment to improved consultation</li> <li>• Intensified SEM engagement using agreed and consistent key messages delivered by Agency or Ministerial representatives</li> </ul>
IA Council members’ concerns about independent assessment and Scheme reform are not allayed or are exacerbated	<ul style="list-style-type: none"> <li>• Ensure that Scheme Reform negotiables align with key sector concerns</li> </ul>
Participant and family community networks do not understand / accept the outcomes of the IA Council-led workshops	<ul style="list-style-type: none"> <li>• Key messages explain why Council attendees invited</li> <li>• Pre and post Council IA workshops communiques issued and promoted via social and via targeted S&amp;T/peaks engagement</li> <li>• Recommend that IA Council issue communiques pre and post workshops, promoted via NDIA channels and with S&amp;T/peak engagement to maintain commitment to improved consultation.</li> <li>• Communiques to clearly outline issues, topics discussed, agreed outcomes, outstanding issues and next steps</li> </ul>
Providers including allied health professional associations do not understand / accept the outcomes of the IA Council-led workshops	<ul style="list-style-type: none"> <li>• Key messages explain why Council attendees invited</li> <li>• Targeted SEM engagement of AH peak bodies, associations and influential individuals</li> <li>• Pre and post Council IA workshops communiques issued and promoted via social and via targeted S&amp;T/peaks engagement</li> <li>• Recommend that Council issue communiques pre and post workshops, promoted via NDIA channels and with S&amp;T/peak engagement to maintain commitment to improved consultation.</li> <li>• Communiques to clearly outline issues, topics discussed, agreed outcomes, outstanding issues and next steps</li> </ul>
The disability sector and community mobilises an integrated campaign opposing independent assessment, targeting the Senate, disability ministers and federal MPs and Senators	<ul style="list-style-type: none"> <li>• Intensive and targeted SEM engagement</li> <li>• Key messages used in broadcast communications and community, sector and provider engagement to explain: <ul style="list-style-type: none"> <li>• Why reforms are required to ensure an affordable Scheme</li> <li>• Negotiated refinements endorsed by Council and sector representatives</li> </ul> </li> <li>• Clear and accessible quality assurance process</li> <li>• Proactive media activities including NDIA media spokespeople</li> <li>• Correct misinformation in media</li> </ul>

## Phases of Scheme Reform Communication and Engagement

Date	Ministerial Phase	NDIA Phase
February – March	N/A	<p><b>You Said – CONSULT</b></p> <ul style="list-style-type: none"> <li>• NDIA release post consultation summary reports which outline key issues participants and the sector identified in the consultation process</li> </ul>
May – Mid June	<p><b>Listening and Forming View</b></p> <ul style="list-style-type: none"> <li>• Roundtables</li> <li>• Initial DRMM</li> </ul> <p><b>Explaining the problem</b></p> <ul style="list-style-type: none"> <li>• Budget announcement</li> <li>• JSC appearances</li> <li>• Targeted sector, community and participant engagement</li> </ul>	<p><b>We heard – CONSULT</b></p> <ul style="list-style-type: none"> <li>• Information release on personalised budgets and affordability aligned to key milestones of Senate Estimates</li> <li>• Comprehensive stakeholder engagement via SEM to confirm key issues of concern and potential discussion topics at Council led workshops, individual SEM meetings and sector forums</li> <li>• Initial two day workshop and additional follow-up workshops led by Council with invited influential sector representatives:               <ul style="list-style-type: none"> <li>○ Mary Sayers, Children and Young People with Disability Australia</li> <li>○ Liz Callaghan, Carers Australia</li> <li>○ Catherine McAlpine, Inclusion Australia</li> <li>○ Robbi Williams, JFA Purple Orange</li> <li>○ Janet Meagher, Former IAC member</li> <li>○ Jim Simpson, NSW Council for Intellectual Disability</li> <li>○ Scott Avery, Indigenous disability academic and advocate</li> <li>○ Katherine Annear, Autistic Self Advocacy Network of Australia and New Zealand</li> <li>○ Leanne Pearman, Western Australian Individualised Services</li> <li>○ John Walsh AM, former NDIA Board member, former Principal Member IIA Council and former Associate Commissioner to the Productivity Commission Inquiry into long-term care and support for people with disability, 2011</li> </ul> </li> <li>• Ongoing Council-led workshops, possibly with sub-sets of sector representatives, to work on detail recommendations for Scheme Reform improvements or refinements</li> <li>• Final Council-led workshop to finalise recommendations to NDIA Board</li> <li>• Ongoing targeted 1:1 engagement with national peak bodies to review opportunities to find compromise on an individual basis with national peak bodies feeding into Council-led workshops</li> </ul>

Mid June – Mid July	<b>Testing New Ideas and Rebranding</b>	<p><b>We heard – SHARE</b></p> <ul style="list-style-type: none"> <li>• Publish evaluation of evaluation report second pilot in early July. This will include learnings from the pilot and things we will do differently as a result.</li> <li>• Share information about Council-led consultations via NDIA/DSS S&amp;T meetings and advisory councils</li> <li>• Cascade engagement to inform state and territory sub-peaks, professional associations, community and sector organisations, participant and family networks and providers</li> <li>• Multi-mode provision of a clear and comprehensive outline of the constraints with the current NDIS system aligned to equity, decision making and affordability concerns and future operation of the NDIS and the requirement for reform</li> <li>• Inform other advisory and governance groups</li> <li>• DSS/NDIA to ensure state and territories have a detailed understanding of trajectory and options for the Scheme as well as embargoed copies of key information prior to release</li> </ul>
Mid-July – Mid-August	<b>Decisions on Way Forward</b>	<p><b>We did – SHARE</b></p> <ul style="list-style-type: none"> <li>• Share information from the evaluation of the independent assessment pilot</li> <li>• Share outcomes from the Council-led consultation plus options to respond to feedback including:</li> <li>• Case studies and journey maps for new and existing participants (+ and – 7)</li> <li>• DSS/NDIA to ensure state and territories understand trajectory and options for the Scheme</li> <li>• Share how the outcomes from previous and Council-led consultation are being incorporated into design and implementation approach.</li> <li>• DRMM communique</li> </ul>
Mid-August – Mid-September	<b>Consult on Legislation</b>	<p><b>We did – CONSULT</b></p> <ul style="list-style-type: none"> <li>• DSS and NDIA to collaborate on engagement and consultation to support legislation exposure draft consultation</li> </ul>
September	<b>Introduce Legislation</b>	Support DSS-led draft legislative consultation

## Stakeholder analysis

Stakeholder	Communication and Engagement needs	Outcomes (Intended result and actions)	Led by
State and Territory Disability Ministers	NDIA Government Relations and DSS	<ul style="list-style-type: none"> <li>• Secure S&amp;T ministerial support for changes</li> <li>• Seek additional feedback to inform policy and administrative adjustments and implementation approach on specific components of Scheme Reform</li> <li>• Confirm S&amp;T-led engagement activities with Disability Advisory Councils</li> </ul>	Ross Carlton and Paul Dobson
Sector representatives invited to Council workshop	NDIA Policy Research and Advice and Scheme Reform Communication and Engagement	<ul style="list-style-type: none"> <li>• Seek additional feedback to inform policy and administrative adjustments and implementation approach on specific components of Scheme Reform</li> </ul>	Think Place Leah van Poppel (IA Council) Sam Bennett /Jamie Lowe
Allied Health Practitioners	NDIA Research and Advice and Provider Engagement	<ul style="list-style-type: none"> <li>• Kept informed of integrated approach to Scheme reform consultation reset</li> <li>• Informed of IA Council-led workshop discussions and outcomes</li> </ul>	Trent Tolra Stephen Broadfoot / Suzi McLeod
Participants and their families	NDIA Scheme Reform Communications and Engagement and Community Engagement and Communications	<ul style="list-style-type: none"> <li>• Kept informed of integrated approach to Scheme reform consultation reset</li> <li>• Informed of IA Council-led workshop discussions and outcomes</li> <li>• Aware of S&amp;T DAC updates</li> </ul>	Fiona Anderson Kath Harris Simon Hill (PRG)
National representative Organisations and State-based sub peaks and peer organisations	Community Engagement and Communications	<ul style="list-style-type: none"> <li>• Kept informed of integrated approach to Scheme reform consultation reset</li> <li>• Informed of IA Council-led workshop discussions and outcomes</li> <li>• Aware of S&amp;T Disability Advisory Council updates</li> <li>• Aware of NDIS social media and website updates</li> </ul>	Kath Harris
NDIA Provider Engagement	PE and SRCE to collaborate - similar to CEC	<ul style="list-style-type: none"> <li>• Kept informed of integrated approach to Scheme reform consultation reset</li> <li>• Informed of IA Council-led workshop discussions and outcomes</li> <li>• Aware of S&amp;T DAC updates</li> <li>• Aware of NDIS social and website updates</li> </ul>	Stephen Broadfoot



Stakeholder	Communication and Engagement needs	Outcomes (Intended result and actions)	Led by
Media	Media and Marketing Branch	<ul style="list-style-type: none"> <li>Keep informed through proactive engagement</li> <li>Correct information where required</li> </ul>	Shannon Rees

## Key messages

### Ministerial reset

- The Minister for the NDIS, Senator the Hon Linda Reynolds, confirmed in April 2021 that she would take time to consult further with state and territory disability ministers and with the disability sector on proposed reforms to the NDIS before proceeding with legislative change.
- We are taking more time to listen and consult further, so we can continue to build a clearer picture of how the reforms will work together to deliver the NDIS as it was intended.
- We are committed to improving our approach based on the consultation processes, the second independent assessment pilot and sector feedback.
- We want to address concerns raised from our continued consultation to make sure the Scheme works better, now and into the future.
- We are listening and consulting further on the proposed NDIS Reforms through:
  - Independent Advisory Council led consultation to discuss and agree on potential adjustments to Scheme reforms, detailed design workshops
  - Further engagement with State and Territory governments and their advisory councils
  - Additional engagement and sharing more information with the sector, providers and the disability community responding to concerns raised in consultation submissions
  - Engagement with NDIA-led governance forums such as the sector CEO forum, Participant Reference Group, Autism Advisory Group, Industry Reference Group and Mental Health Sector Reference Group.
- The NDIA Board and Executive have committed to a series of workshops led by the Independent Advisory Council with invited sector representatives.
- The first workshop with the Independent Advisory Council will be held in mid-June and will be hosted by an independent facilitator.
- The aim of the first workshop is for the Independent Advisory Council and sector representatives to identify areas for improvement to the proposed NDIS access and planning reforms, including independent assessments to help address sector concerns.
- A series of workshops will be undertaken between June and July to provide further opportunities for the Independent Advisory Council, sector representatives and State and Territory disability advisory councils to consider these recommendations.
- The advice and recommendations from the Independent Advisory Council led workshops will be provided to the NDIA Board for consideration along with the Minister for the NDIS.
- Minister for the NDIS will provide agreed recommendations to inform discussion at the Disability Reform Minister's Meeting.
- The Minister for the NDIS, DSS and NDIA will release further information about the next steps for the reforms after the August Disability Reform Minister's Meeting.

- In addition to the Independent Advisory Council members, the following people have been invited to participate in the workshops in their personal capacity:
  - Mary Sayers, Children and Young People with Disability Australia
  - Liz Callaghan, Carers Australia
  - Catherine McAlpine, Inclusion Australia
  - Robbi Williams, JFA Purple Orange
  - Janet Meagher, Former Independent Advisory Council member
  - Jim Simpson, NSW Council for Intellectual Disability
  - Scott Avery, Indigenous disability academic and advocate
  - Katherine Annear, Autistic Self Advocacy Network of Australia and New Zealand
  - Leanne Pearman, Western Australian Individualised Services
  - John Walsh AM, former NDIA Board member, former Principal Member Independent Advisory Council and former Associate Commissioner to the Productivity Commission Inquiry into long-term care and support for people with disability, 2011
- A small number of NDIA officials will also attend the workshops.

### **Concerns we're looking at**

- We are committed to share more information to address the concerns we've been hearing from the community through our previous and current consultation activities.
- Over the coming weeks we intend to release further information on:
  - how we will use information gathered through independent assessments to assist with setting draft budgets
  - submissions made to us on the proposed access and planning policies
  - more information on expected future costs of the Scheme
- We have reviewed all 769 submissions to our access and planning consultation process earlier this year.
- We know many people:
  - Didn't feel included in Scheme reform discussions, including the independent assessment development processes.
  - Feel that that there hasn't been sufficient consultation, and we have not explained how their feedback is being heard and addressed.
  - Have concerns about the evaluation of the first and second pilot, don't understand how these pilots will inform the future rollout of the reforms nor how these will benefit participant experiences.
  - Have concerns regarding the toolkit to be used by independent assessors, as well as the skills and training of independent assessors delivering the assessments:
  - Have concerns about whether the independent assessment process would appropriately address the needs of diverse populations, such as those with psychosocial disability, Aboriginal and Torres Strait Islanders and those from CALD backgrounds
  - Are worried about review and appeal rights, ensuring transparent decision-making processes and ensuring there are still avenues such as the AAT for review.

- There has also been much discussion about the lack of community and mainstream supports and services in each State and Territory, and that NDIS was fast becoming the only option for all Australians with a disability.

### **Disability Reform Minister's Meeting**

- The Minister for the NDIS has committed to sharing further information about the proposed Scheme Reforms and the evaluation of the independent assessment pilot to inform discussion at Disability Reform Minister's Meeting.
- Disability Reform Minister's Meeting is a meeting of the Commonwealth and States and Territory Disability Ministers who oversee national reform in disability policy including the NDIS.
- The next meeting of Disability Reform Minister's Meeting on 6 August 2021.

### **Case for reform**

- While the Scheme is achieving positive outcomes for many participants, the rapid rollout of the Scheme has impacted on fairness and consistency of decision making and flexibility of participant funded supports.
- The Commonwealth Government is committed to improving the NDIS in line with the participant-focussed vision embodied in the 2011 Productivity Commission Report.
- From the outset, it was envisaged that the NDIS would support participants to exercise choice and control over their life with a fair, flexible and consistent package of reasonable and necessary supports. The need for the Scheme to remain affordable was also integral to that initial vision.
- There are three main elements of the NDIS that are essential for ensuring successful participant outcomes and greater choice and control, as well as ensuring the Scheme's future. They are:
  - Flexibility for participants to use their package in a way which best meets their needs.
  - Independent functional assessments, provided by the NDIA to ensure fair access and planning decisions for all Australians with disability.
  - Defining a "reasonable and necessary" funding package in a fair way for each person, rather than individual funded supports.
- These building blocks of the NDIS were fundamental to the original design of the Scheme.
- It has become clear is that the Scheme has departed from this original design, and that fairness, consistency and flexibility have been compromised due to the rapid rollout of the Scheme.
- The Agency makes thousands of decision each day about if a participant can or cannot use their plan to pay for a particular support
- Planning meetings have become a negotiation session between participants and the Agency, to justify every support, instead of focusing on a plan to deliver the best outcomes, identify how to use NDIS funded supports along with community, mainstream and informal supports to assist participants to pursue their goals
- Historically, there has been no consistency in the way participants entered the Scheme and were assessed for reasonable and necessary supports. This has resulted in inconsistent outcomes that are not always fair and equitable to participants.
- Data shows that participants in higher socio-economic areas receive average plan budgets that are nine per cent higher than participants in lower socio-economic areas.

## **Budget trajectory**

- While the overall NDIS budget is going up and will continue to do so, data also shows that the rate of growth poses significant challenges to Scheme affordability.
  - Average payments per participant have increased 12.5% per annum for the past three years.
  - This is higher than wage growth.
  - Higher than the 2017 Productivity Commission projections.
  - Higher than assumptions built into the Portfolio Budget Statement.
- The number of people seeking access to the NDIS is well above projections.
- If the rate of growth of the Scheme is left unmitigated, the overall cost of the Scheme would increase within three years to over \$40 billion, compared to the almost \$32 billion budgeted in 2024-25, well over the current cost to tax payers today.
- Like any budget, we have a responsibility to make sure that growth is affordable over the long-term so the Scheme is available for current and new participants well into the future.
- This is not about stopping growth, it is about managing it in a sustainable way
- Both the number of participants and the Scheme's overall budget will continue to grow. In March alone, the Scheme paid for \$2.2 billion worth of supports, \$640 million more than the same month last year.
- We are focused on containing growth – and ensuring we have an affordable NDIS that is enduring and one that delivers the NDIS as originally intended.
- A comprehensive suite of reforms is underway to return the Scheme to the original intention. This means improving consistency, flexibility, choice and control, and affordability of the Scheme.

## **Personalised Budgets**

- We know that at the moment some of our planning decisions are inconsistent – participants in similar circumstances may be getting different funding levels.
- Participants deserve equitable decisions from the NDIA.
- Under Scheme Reforms, we'll be introducing a new way of building plan budgets.
- Participants will receive funding for a package of supports in a Personalised Budget, built using consistently gathered information on functional capacity from independent assessments, alongside other relevant information.
- This means a participant's plan budget will be more clearly aligned with their level of functional capacity and need.
- We will release further information on personalised budgets soon to inform further discussion about the proposed reforms.

## **Issues with the current planning process**

- Data of participants who have been in the Scheme for four years demonstrates a concerning trend – a systemic decline in participants recorded as “high functioning” and an increase in participants recorded as “medium” and “low” functioning.

- The decrease in recorded “high” functioning and increase in “low” functioning is not what would be expected over a four year period under the Scheme. The primary principle of the NDIS is to invest in supports early to build individual capability and reduce need for support over time.
- Level of function recorded is correlated with support need – the lower the level of function the higher the support need. This may be one reason for plan budgets increasing over time at a rate of 12 % per annum.
- A more consistent and objective process to assess and record participants function, using the independent assessment process, would help ensure NDIS participants get the right budgets.

## Communications and Engagement Schedule - May 2021

<b>Purpose</b> Why are we doing it?	<b>Date</b> When?	<b>Target audience</b> Who is it going to?	<b>Activity</b> What is it? How are you doing it?	<b>Outcome</b> What do we expect from it?	<b>Responsibility</b> Who is doing it?
Engagement	12 May	NSW Minister	<b>CEO / State and Territory Minister meetings</b>	Build awareness of need for reform	NDIA Government
Engagement	17 May	IA Pilot Participants	<b>Ministerial Roundtable – WA</b>	Minister actively listening to community, building understanding of concerns	NDIA Events Team
Engagement	17 May	NT Minister	<b>CEO / State and Territory Minister meetings</b>	Build awareness of need for reform	NDIA Government
Media	WC 24 May	Sector and Jurisdictions	<b>NDIS Quarterly Report release</b>	Outline the cost pressures and growth trajectory the NDIS faces	NDIA Media
Comms	WC 24 May	All	<b>Release public information on proposed IAC led consultation approach</b>	Explain the next steps in the consultation process	NDIA SCORE
Engagement	24 May	Sector	<b>Ministerial Roundtable – Tasmania</b>	Minister actively listening to community, building understanding of concerns	NDIA Events Team
Engagement	25 May	Sector	<b>Ministerial Roundtable – Geelong</b>	Minister actively listening to community, building understanding of concerns	NDIA Events Team
Engagement	26 May	Sector	<b>Ministerial Roundtable – Melbourne</b>	Minister actively listening to community, building understanding of concerns	NDIA Events Team
Media	31 May	Sector and Participants	<b>Ministerial Media Release - Personalised Budget Paper release (TBC) and journey maps</b>	Explain how we plan to build budgets and make funding decisions	NDIA Media
Comms	31 May	Sector and Jurisdiction	<b>Second JSC Paper from NDIA</b>	Clarify initial joint JSC statement and provide further information based on JSC discussion	NDIA Government
Comms	31 May	Sector and Participants	<b>Blog and CEO video update</b>	Next phase of consultation, sign post to PB and QR	NDIA Media

<b>Purpose</b> Why are we doing it?	<b>Date</b> When?	<b>Target audience</b> Who is it going to?	<b>Activity</b> What is it? How are you doing it?	<b>Outcome</b> What do we expect from it?	<b>Responsibility</b> Who is doing it?
Comms	May (TBC)	All	<b>NDIS TV – John Walsh</b>	Promote interview with John Walsh on NDIS channels	NDIA Media
Comms	May (TBC)	All	<b>NDIS TV – Pilot Case studies</b>	Build awareness of pilot and participant experiences	NDIA Media
Media	May (TBC)	All	<b>NDIA/ Ministerial Media Release - 8 year update on NDIS key results</b>	Demonstrate the Agency continues delivering for participants	NDIA Media

## Communications and Engagement Schedule - June 2021

<b>Purpose</b> Why are we doing it?	<b>Date</b> When?	<b>Target audience</b> Who's it going to?	<b>Activity</b> What is it? How are you doing it?	<b>Outcome</b> What do we expect from it?	<b>Responsibility</b> Who's doing it?
Comms	June (TBC)	Participants	<b>Case studies Based on Personalised Budget personas</b>	Release of case studies on how IA will work for specific cohorts	NDIA SRCE
Engagement	June (TBC)	Participants	<b>Participant Reference Group (PRG)</b>	Update on next phase of consultation	NDIA Participant Advocacy/ SRCE
Engagement	1 June	Participants	<b>Ministerial Roundtables – ACT</b>	Minister actively listening to community, building understanding of concerns	NDIA Events
Media	3/4 June	Senators	<b>Senate Estimates</b>	Discussion on reforms	NDIA Government
Engagement	6 June	WA Minister	<b>CEO / State and Territory Minister meetings</b>	Build awareness of need for reform	NDIA Government
Engagement	Early June	Community	<b>Targeted 1:1 engagement</b> with sector stakeholders (1) attendees at IAC (2) high influence stakeholders (3) community networks and state peak bodies	Update on next phase of consultation, explain PB and QR	NDIA SRCE
Engagement	June (TBC)	Providers	<b>Engagement with Providers</b> – Allied Health and key provider peaks	Update on next phase of consultation, explain PB and QR	NDIA Provider Engagement with SRCE
Engagement	Early June	Sector	<b>Information sharing with existing governance groups</b> AAG, MHSRG, IDRG, IRG etc	Update on next phase of consultation, explain PB and QR	NDIA SRCE
Consultation	10/11 June	IAC and Sector	<b>IAC led engagement two day workshop</b>	Build understanding of need for reform and seek consensus around solutions and areas/solutions for change	NDIA Policy
Engagement	Mid June	IAC and Sector	<b>IAC Members at Jurisdictional Advisory Councils</b>	NDIA to offer IAC members opportunity to brief their jurisdictions advisory network	NDIA Government



<b>Purpose</b> Why are we doing it?	<b>Date</b> When?	<b>Target audience</b> Who's it going to?	<b>Activity</b> What is it? How are you doing it?	<b>Outcome</b> What do we expect from it?	<b>Responsibility</b> Who's doing it?
Engagement	Mid June	Sector and participants	<b>Ministerial Roundtables – QLD</b>	Minister actively listening to community, building understanding of concerns	NDIA Events
Engagement	Mid June	Sector and participants	<b>Ministerial Roundtables – NT</b>	Minister actively listening to community, building understanding of concerns	NDIA Events
Consultation	Mid June	Sector and participants	<b>Home and Living Consultation</b>	Open and targeted consultation on future of Home and Living	NDIA SRCE
Consultation	Mid June	Sector and participants	<b>Support for Decision Making Consultation</b>	Open and targeted consultation how the NDIA supports for decision making	NDIA SRCE
Engagement	16 June	VIC Minister	<b>CEO / State and Territory Minister meetings</b>	Build awareness of need for reform	NDIA Government
Engagement	18 June	Sector CEOs	<b>NDIA CEO Forum</b>	Update on consultation approach facilitated by Thinkplace, QR and PB	NDIA SRCE
Comms	June TBC	Community	<b>CEO / Spokesperson Podcasts (DSC/ Summer Foundation/ Kurt Fernley) (TBC)</b>	Explaining the challenges of the NDIS	NDIA Media
Comms	June TBC	Providers and Participants	<b>Updated NDIS Price guide and addendum for COVID-19 pricing</b>	Explaining the updates to the NDIS price guide	NDIA Pricing
Engagement	June TBC	Sector	<b>Minster Roundtable with Sector representatives to explain next steps and address specific concerns</b>	Explain progress of consultation and next steps	NDIA Events
Comms	June TBC	Community	<b>NDIA Podcast Series</b>	Explaining the challenges of the NDIS	NDIA Media
Comms	Late June	Sector and participants	<b>Virtual Town Hall – Webinar 1 (TBC)</b>	Minister and NDIA to provide latest update	NDIA SRCE/Comms

<b>Purpose</b> Why are we doing it?	<b>Date</b> When?	<b>Target audience</b> Who's it going to?	<b>Activity</b> What is it? How are you doing it?	<b>Outcome</b> What do we expect from it?	<b>Responsibility</b> Who's doing it?
Comms	Late June	Sector and Jurisdictions	<b>Monthly update on NDIS expenditure and participant numbers – dedicated web page</b>	Ongoing data on trajectory	NDIA Media
Comms	Late June	Sector and participants	<b>Blog CEO video update</b>	Release of case studies on how IA will work for specific cohorts	NDIA Media

## Communications and Engagement Schedule - July 2021

<b>Purpose</b> Why are we doing it?	<b>Date</b> When?	<b>Target audience</b> Who's it going to?	<b>Activity</b> What is it? How are you doing it?	<b>Outcome</b> What do we expect from it?	<b>Responsibility</b> Who's doing it?
Comms	July TBC	Participants	<b>App release on android</b>	Promotion of NDIS payment app on android	NDIA SRCE
Media	July TBC	Sector and participants	<b>Ministerial Media Release – Pilot Report</b>	Release outcome of participant experience and Assessment quality evaluation	NDIA Media
Comms	July TBC	Sector and participants	<b>Evaluation report of second Pilot and promotion of Pilot case studies</b>	Specific Pilot experiences shared, reinforce scope of pilot and forecast DRMM	NDIA Media
Engagement	July	IAC and Sector	<b>Ongoing IAC Members at Jurisdictional Advisory Councils</b>	NDIA to offer IAC members opportunity to brief their jurisdictions advisory network	NDIA Government
Consultation	Early July	IAC and Sector	<b>IAC led engagement follow up sessions workshop</b>	Specific sessions to address cohort specific concerns	NDIA Policy
Consultation	Early July	IAC and Sector	<b>IAC led engagement recommendation meeting</b>	Final meeting to agree on consensus actions and recommendations.	NDIA Policy
Comms	Late July	Ministers	<b>DRRM information pack</b> <ul style="list-style-type: none"> <li>- Recommendations</li> <li>- Pilot Evaluation</li> <li>- Journey Maps</li> <li>- Case Studies (video/written)</li> <li>- Quality Assurance Framework</li> </ul>	Suite of information including IAC recommendations, Pilot Evaluation and next steps	NDIA SRCE
Comms	Late July	MPs and Senators, Sector and participants	<b>Consultation 2 pager with visual explainer on adjustments</b>	Information paper to support MP and Senator Engagement post DRMM	NDIA SRCE
Comms	Late July	Sector and participants	<b>Monthly CEO video update</b>	TBC	NDIA Media

<b>Purpose</b> Why are we doing it?	<b>Date</b> When?	<b>Target audience</b> Who's it going to?	<b>Activity</b> What is it? How are you doing it?	<b>Outcome</b> What do we expect from it?	<b>Responsibility</b> Who's doing it?
Comms	Late July	Community	<b>Ongoing spokesperson regular local radio talkback on consultation and engagement process</b>	Explain rationale for reforms and genuine consultation efforts	NDIA Media
Engagement	July	Sector	<b>Ministerial Roundtables to with Sector test IAC recommendations</b>	Road test some of the proposed changes to approach	NDIA Events

# Communications and Engagement Schedule

## August 2021

<b>Purpose</b> Why are we doing it?	<b>Date</b> (When?)	<b>Target audience</b> Who's it going to?	<b>Activity</b> What is it? How are you doing it?	<b>Outcome</b> What do we expect from it?	<b>Responsibility</b> Who's doing it?
Media	July TBC	Sector and participants	<b>Ministerial Media Release – Pilot Report</b>	Release outcome of participant experience and Assessment quality evaluation	NDIA Media
Engagement	6 August	Ministers	<b>DRMM</b>	Discuss next steps on Scheme Reforms	DSS
Comms	6 August	Sector and participants	<b>Communique from DRMM</b>	Explain what was discussed at DRMM	DSS
Media	Early August	Sector and participants	<b>Post DRMM media release</b>	Decision and way forward explaining next steps on Scheme Reforms	NDIA Media
Comms	Early August	Sector and participants	<b>Release of Pilot evaluation</b>	Release Pilot evaluation and next steps on reforms	NDIA SRCE
Comms	Early August	Sector and participants	<b>Virtual Town Hall – Webinar 2 (TBC)</b>	Minister and NDIA to provide latest update	NDIA SRCE/Comms
Comms	Mid August	Sector and participants	<b>We Did marketing campaign</b>	Promoting the adjustments made to policy base on consultation	NDIA SRCE/Media
Consultation	Mid August	IAC and Sector	<b>IAC led engagement on further design enhancements</b>	Potential for ongoing meetings to discuss next steps and implementation.	NDIA Policy
Consultation	Mid August	Ministers	<b>MIN, DSS and NDIA State and Territory Ministerial meetings</b>	Build awareness and test legislative timeframe	NDIA Government
Engagement	Mid August	Sector	<b>Ministerial Roundtables with to test legislative timings and process</b>	Road test some of the proposed changes to approach	NDIA Events
Media	Late August	Jurisdictions and Sector	<b>Media Release - Legislation and the consultation period timeframes</b>	Awareness of forthcoming Legislation and planned consultation period timeframes	NDIA Media and DSS

