



MODULE 4:

Shared Management in the NDIS



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Make sure you save your work by downloading and saving this PDF to your own computer before you write in it.

Introduction

When people become NDIS Participants, they have three options about how to manage their NDIS plan and funding. They can choose one or a combination of these management options for different parts of their plan.

Agency Management

Agency management is when the NDIS pays the service providers directly on behalf of the person. Service providers are responsible for submitting a payment request in order to receive the funding from the NDIS to cover the cost of the supports they provide after they have provided them.



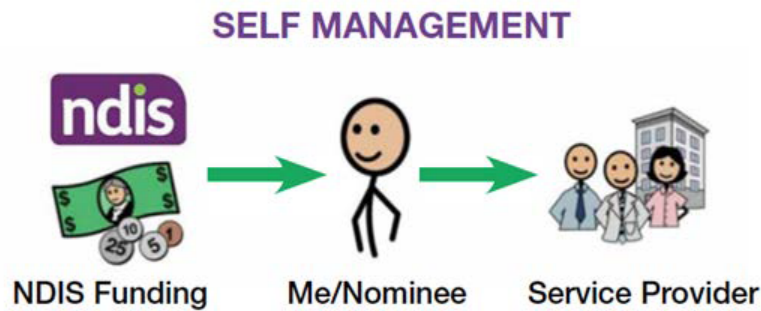
Plan Management

In Plan management, the person engages a Plan Manager to get their funding (payment) requests from the NDIS and pay for their supports and services on their behalf. The Plan Manager needs to be registered with the NDIS, and if people choose this option, they receive a small additional amount of money to pay the Plan Manager.



Self Management

This option gives the person total control and responsibility for managing the funding and supports in their plan. The person or their representative (called a Nominee) is responsible for organising and managing the services, getting the money from the NDIS and paying the providers.



None of these is a Shared Management option in the way that Shared Management existed in some Australian States prior to the NDIS. And the NDIS is unlikely to develop a Shared Management option to sit alongside these choices. This raises questions such as:

1. How does Shared Management fit within the NDIS?
2. If so, which management option is the best one to use? and
3. Operationally and practically, how do you make it work?

This module addresses these three questions to achieve the following learning outcomes.

Learning Outcomes

By the end of this module, you will be able to:

1. Explain how Shared Management services and activities align with and fulfil the intentions of the NDIS Act
2. Describe how Shared Management can be implemented under the NDIS's Agency Management option
3. Describe how Shared Management can be implemented under the NDIS's Plan Management option
4. Describe how Shared Management can be implemented under the NDIS's Self Management option

Activity 4.0: How do you rate for Shared Management in the NDIS?

Using the scale below, rate your response to each of the following statements. Write your score for each statement in column to the right.

Nil: 1

Low: 2

Average: 3

Sound: 4

Comprehensive: 5

Your Score here

I can explain how Shared Management fits with the intentions of the NDIS Act	1	2	3	4	5	
I can explain how our organisation can provide people and families with the practical support they want using Shared Management in an NDIS context	1	2	3	4	5	
I can clearly explain the differences between the NDIS's Agency Managed, Plan Managed and Self-Managed options	1	2	3	4	5	
Our organisation can give people and families clear advice about what services to request in their NDIS plans in order to be able to receive the Shared Management support they are looking for	1	2	3	4	5	
Our organisation can provide NDIS participants with short videos, real life case study examples and other resources that assist people who share manage as they transition into the NDIS	1	2	3	4	5	
Our organisation has clear information about the cost of our services that are not frontline support services	1	2	3	4	5	

Total Score

Activity 4.1: How does Shared Management promote and support the intentions of the NDIS?

In the Table next page we've listed the five Shared Management Principles in the left hand column. The headings of the other columns relate to Sections 3, 4 and 5 from Part 2 of The NDIS Act. Below the Table, you'll find these three Sections of The Act copied out for you.

Section 3 (The Objects) is important because it spells out the intentions behind the legislation: i.e. what it sets out to achieve. Sections 4 and 5 are important because they explicitly describe the "General principles guiding actions under the Act". They tell us how things are supposed to work within the NDIS.

The purpose of this Activity is to help you as a service provider see how the Shared Management Principles align with, and promote the intentions and general principles of The Act. As you peruse the excerpt from The Act, make notes in the relevant columns to identify which Shared Management Principles can contribute to achieving each of the specific Objects and Principles. Note the relevant Objects and Principles (either by number or in full) in the spaces provided alongside each Shared Management Principle.

Shared Management Principle	Objects of NDIS Act (Section 3)	General principles guiding actions under this Act (Section 4)	General principles guiding actions of people who may do act or things on behalf of others (Section 5)
Shared Management is a partnership built on mutual respect in which the person or their family member is the leader. Both parties will treat each other openly, honestly and fairly.			
Shared Management is built on recognising the person's expertise in guiding and organising their own life. This includes the person's decisions about how much responsibility they have in the Shared Management arrangement.			
Shared Management arrangements support and expand the person's autonomy, capability and right to participate as a full citizen in all aspects of society and community.			
The person or their family member can decide how their funded resources and services can best be used and organised. The person or their family member has the right to change their mind.			
The person or their family member is the employer of paid support.			

Excerpt from The NDIS Act

Part 2—Objects and principles

3 Objects of Act

- (1) The objects of this Act are to:
- (a) in conjunction with other laws, give effect to Australia's obligations under the Convention on the Rights of Persons with Disabilities done at New York on 13 December 2006 ([2008] ATS 12); and
 - (b) provide for the National Disability Insurance Scheme in Australia; and
 - (c) support the independence and social and economic participation of people with disability; and
 - (d) provide reasonable and necessary supports, including early intervention supports, for participants in the National Disability Insurance Scheme launch; and
 - (e) enable people with disability to exercise choice and control in the pursuit of their goals and the planning and delivery of their supports; and
 - (f) facilitate the development of a nationally consistent approach to the access to, and the planning and funding of, supports for people with disability; and
 - (g) promote the provision of high quality and innovative supports that enable people with disability to maximise independent lifestyles and full inclusion in the community; and
 - (h) raise community awareness of the issues that affect the social and economic participation of people with disability, and facilitate greater community inclusion of people with disability; and
 - (i) in conjunction with other laws, give effect to certain obligations that Australia has as a party to:
 - (i) the International Covenant on Civil and Political Rights done at New York on 16 December 1966 ([1980] ATS 23); and
 - (ii) the International Covenant on Economic, Social and Cultural Rights done at New York on 16 December 1966 ([1976] ATS 5); and
 - (iii) the Convention on the Rights of the Child done at New York on 20 November 1989 ([1991] ATS 4); and
 - (iv) the Convention on the Elimination of All Forms of Discrimination Against Women done at New York on 18 December 1979 ([1983] ATS 9); and
 - (v) the International Convention on the Elimination of All Forms of Racial Discrimination done at New York on 21 December 1965 ([1975] ATS 40).

Note: In 2013, the text of a Convention or Covenant in the Australian Treaty Series was accessible through the Australian Treaties Library on the AustLII website (www.austlii.edu.au).

- (2) These objects are to be achieved by:
 - (a) providing the foundation for governments to work together to develop and implement the National Disability Insurance Scheme launch; and
 - (b) adopting an insurance-based approach, informed by actuarial analysis, to the provision and funding of supports for people with disability.

- (3) In giving effect to the objects of the Act, regard is to be had to:
 - (a) the progressive implementation of the National Disability Insurance Scheme; and
 - (b) the need to ensure the financial sustainability of the National Disability Insurance Scheme; and
 - (c) the broad context of disability reform provided for in:
 - (i) the National Disability Strategy 2010-2020 as endorsed by COAG on 13 February 2011; and
 - (ii) the Carer Recognition Act 2010; and
 - (d) the provision of services by other agencies, Departments or organisations and the need for interaction between the provision of mainstream services and the provision of supports under the National Disability Insurance Scheme.

4 General principles guiding actions under this Act

- (1) People with disability have the same right as other members of Australian society to realise their potential for physical, social, emotional and intellectual development.
- (2) People with disability should be supported to participate in and contribute to social and economic life to the extent of their ability.
- (3) People with disability and their families and carers should have certainty that people with disability will receive the care and support they need over their lifetime.
- (4) People with disability should be supported to exercise choice, including in relation to taking reasonable risks, in the pursuit of their goals and the planning and delivery of their supports.
- (5) People with disability should be supported to receive reasonable and necessary supports, including early intervention supports.
- (6) People with disability have the same right as other members of Australian society to respect for their worth and dignity and to live free from abuse, neglect and exploitation.
- (7) People with disability have the same right as other members of Australian society to pursue any grievance.

- (8) People with disability have the same right as other members of Australian society to be able to determine their own best interests, including the right to exercise choice and control, and to engage as equal partners in decisions that will affect their lives, to the full extent of their capacity.
- (9) People with disability should be supported in all their dealings and communications with the Agency so that their capacity to exercise choice and control is maximised in a way that is appropriate to their circumstances and cultural needs.
- (10) People with disability should have their privacy and dignity respected.
- (11) Reasonable and necessary supports for people with disability should:
 - (a) support people with disability to pursue their goals and maximise their independence; and
 - (b) support people with disability to live independently and to be included in the community as fully participating citizens; and
 - (c) develop and support the capacity of people with disability to undertake activities that enable them to participate in the community and in employment.
- (12) The role of families, carers and other significant persons in the lives of people with disability is to be acknowledged and respected.
- (13) The role of advocacy in representing the interests of people with disability is to be acknowledged and respected, recognising that advocacy supports people with disability by:
 - (a) promoting their independence and social and economic participation; and
 - (b) promoting choice and control in the pursuit of their goals and the planning and delivery of their supports; and
 - (c) maximising independent lifestyles of people with disability and their full inclusion in the community.
- (14) People with disability should be supported to receive supports outside the National Disability Insurance Scheme, and be assisted to coordinate these supports with the supports provided under the National Disability Insurance Scheme.
- (15) Innovation, quality, continuous improvement, contemporary best practice and effectiveness in the provision of supports to people with disability are to be promoted.
- (16) Positive personal and social development of people with disability, including children and young people, is to be promoted.
- (17) It is the intention of the Parliament that the Ministerial Council, the Minister, the Board, the CEO and any other person or body is to perform functions and exercise powers under this Act in accordance with these principles, having regard to:
 - (a) the progressive implementation of the National Disability Insurance Scheme; and
 - (b) the need to ensure the financial sustainability of the National Disability Insurance Scheme.

5 General principles guiding actions of people who may do acts or things on behalf of others

It is the intention of the Parliament that, if this Act requires or permits an act or thing to be done by or in relation to a person with disability by another person, the act or thing is to be done, so far as practicable, in accordance with both the general principles set out in section 4 and the following principles:

- (a) people with disability should be involved in decision making processes that affect them, and where possible make decisions for themselves;
- (b) people with disability should be encouraged to engage in the life of the community;
- (c) the judgements and decisions that people with disability would have made for themselves should be taken into account;
- (d) the cultural and linguistic circumstances, and the gender, of people with disability should be taken into account;
- (e) the supportive relationships, friendships and connections with others of people with disability should be recognised;
- (f) if the person with disability is a child—the best interests of the child are paramount, and full consideration should be given to the need to:
 - (i) protect the child from harm; and
 - (ii) promote the child's development; and
 - (iii) strengthen, preserve and promote positive relationships between the child and the child's parents, family members and other people who are significant in the life of the child.

Activity 4.2: How does Shared Management work using an Agency Management approach?

What are the key steps you need to know about in order to use this approach successfully?

What are some possible benefits of using this approach?

What might be some limitations or issues associated with using this approach?

Activity 4.3: How does Shared Management work using a Plan Management approach?

What are the key steps you need to know about in order to use this approach successfully?

What are some possible benefits of using this approach?

What might be some limitations or issues associated with using this approach?

Activity 4.4: How does Shared Management work using a Self Management approach?

What are the key steps you need to know about in order to use this approach successfully?

What are some possible benefits of using this approach?

What might be some limitations or issues associated with using this approach?

Activity 4.5: What practical things do you need to know and do to use these options successfully?

Will any of these approaches fit better with your organisation's purpose, values, cost structures and systems than other approaches? How and why?

If you were to use only one of these approaches, how would you respond to people who want to use your services but prefer a different approach?

What changes might you need to make to your organisation's staffing, processes or systems in order to provide Shared Management using one or more of these three options?

What actions are you going to take to support people in the NDIS to use Shared Management?

Activity 4.6: How do you now rate for Shared Management in the NDIS?

Using the scale below, rate your response to each of the following statements. Write your score for each statement in column to the right.

	Nil: 1	Low: 2	Average: 3	Sound: 4	Comprehensive: 5	Your Score here
I can explain how Shared Management fits with the intentions of the NDIS Act	1	2	3	4	5	
I can explain how our organisation can provide people and families with the practical support they want using Shared Management in an NDIS context	1	2	3	4	5	
I can clearly explain the differences between the NDIS's Agency Managed, Plan Managed and Self-Managed options	1	2	3	4	5	
Our organisation can give people and families clear advice about what services to request in their NDIS plans in order to be able to receive the Shared Management support they are looking for	1	2	3	4	5	
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Our organisation has clear information about the cost of our services that are not frontline support services	1	2	3	4	5	

Total Score