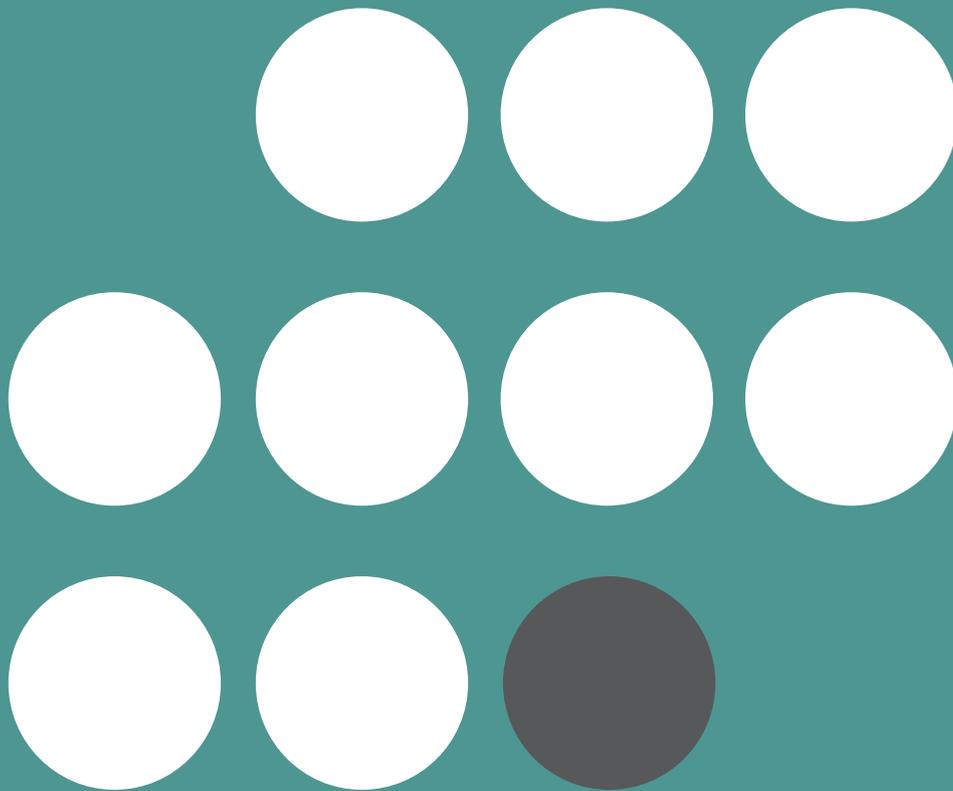


# BUSINESS CONFIDENCE SURVEY OF THE DISABILITY SERVICES SECTOR

RESULTS  
FROM 2014



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### **ABOUT NATIONAL DISABILITY SERVICES**

National Disability Services is the peak industry body for non-government disability services. Its purpose is to promote and advance services for people with disability. Its Australia-wide membership includes over 1030 non-government organisations, which support people with all forms of disability. Its members collectively provide the full range of disability services – from accommodation support, respite and therapy to community access and employment. NDS provides information and networking opportunities to its members and policy advice to State, Territory and Federal governments.

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The Centre for Applied Disability Research exists to improve the wellbeing of people living with disability by gathering insights, building understanding and sharing knowledge. The Centre for Applied Disability Research is an initiative of National Disability Services.

# **BUSINESS CONFIDENCE SURVEY OF THE DISABILITY SERVICES SECTOR**

**RESULTS  
FROM 2014**

# ABOUT THIS REPORT

## WHY IS BUSINESS CONFIDENCE IMPORTANT?

National Disability Services (NDS) is measuring and tracking the confidence of disability service organisations in the context of the staged implementation of the National Disability Insurance Scheme (NDIS) and other significant sector reforms.

Business confidence is a lead indicator for monitoring the level of optimism or pessimism that CEOs feel about the prospects of their organisation achieving its objectives. It provides key insights into:

- the leadership, governance and management of organisations
- the organisation and market responses to policy changes
- the nature of decision making and operating conditions in the short and long-term.

By measuring and tracking the levels of business confidence in the disability services sector over time, NDS can better understand how the sector is responding to change and advocate for policy and regulatory settings that enhance the sustainability and diversity of disability services. Monitoring business sentiment allows CEOs and Boards of organisations to assess how their organisation is faring in comparison to peers and competitors. Ultimately it informs the evolution of organisational strategies and responses that ensure the right services are in the right place at the right time for the right price. Provider confidence in the operating environment is therefore directly linked to better quality of life outcomes for people with disability.

## METHODOLOGY

In 2013, NDS contracted independent research consultants Ernst & Young and BMG Research to conduct the Business Confidence Survey. The questionnaire was emailed to member CEOs of NDS in May (Wave One) and November 2014 (Wave Two). A total of 882 invitations were issued in Wave One and 974 invitations in Wave Two. The response rate varied by question (all questions were voluntary), with 42 per cent completing the survey in Wave One and 39 per cent completing the survey in Wave Two.

Respondents were asked to assess their organisation's performance in the past six months (prior to the survey being conducted) and to indicate their performance expectations for the next six month period.

In December 2014, an online qualitative survey was also conducted with 130 CEOs to better understand some of the challenges and drivers they encounter in managing their organisation.

## STRUCTURE OF THE REPORT

The key drivers behind business confidence in the disability services sector are considered in Section 1.

Challenges and opportunities for disability service providers are considered in Section 2. These relate to organisational resources, human capital, financial resources, strategy, demand and competition.

Challenges and opportunities for public policy that relate to uncertainty, the speed of NDIS implementation and the financial strength of organisations are explored in Section 3.



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# **SECTION 1: CONFIDENCE AT A GLANCE**

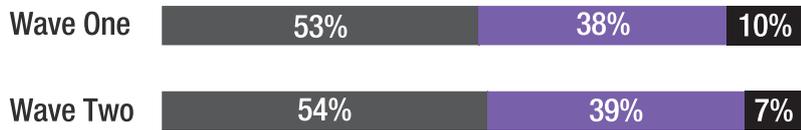
# SECTION 1: CONFIDENCE AT A GLANCE

Despite the high levels of uncertainty and a sense of increasing competition, business confidence within disability service organisations is moderately high and remained steady throughout 2014. More than half of organisations reported that they had exceeded or met all of their objectives, and 62 per cent expected to exceed or meet all their objectives over the following six months (both Wave One and Two).

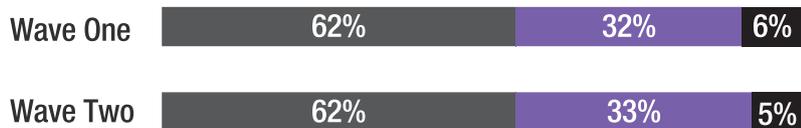
Business confidence in the sector as a whole was less optimistic. At least half of organisations (51 per cent) believed the operating conditions for the wider disability sector had worsened over the past six months, with slightly fewer (47 per cent) expecting this to continue over the next six months.

**Figure 1:**  
Confidence in meeting objectives over the past six months and next six months

## PAST 6 MONTHS



## NEXT 6 MONTHS



- Exceed(ed) or meet(met) all
- Meet (Met) most
- Meet (Met) some or will (did) not meet any

## THE CONFIDENT & THE LESS CONFIDENT

**Confident organisations** (defined as those expecting to exceed or meet all of their objectives) were more likely to report having:



· **sufficient financial resources** to meet their needs



· **sufficient organisational resources** to meet their needs



· the **ability to satisfy all the demand** for their services



· **plans to increase** the scale and/or range of services and clients



· **strong relationships** with key stakeholders



· a **more positive view** of the operating conditions of the disability services sector, the not-for-profit sector and business in the wider Australian economy.

### Less confident organisations

(defined as organisations meeting most, some or none of their objectives) are more likely to report having:

· **less than sufficient financial resources** to meet their needs



· **decreased income** from philanthropy and Federal Government



· **decreasing financial reserves** and working capital



· increased use of **debt finance**



· **difficulty** recruiting and retaining **staff**



· **not considered** joint working arrangements.



Confident and less confident organisations did not show any difference in either their annual turnover or states or territories of operation.

By looking at the characteristics of confident and less confident organisations, we are able to better understand what is influencing the confidence of CEOs in meeting their organisational objectives.

# **SECTION 2: CHALLENGES AND OPPORTUNITIES FOR PROVIDERS**

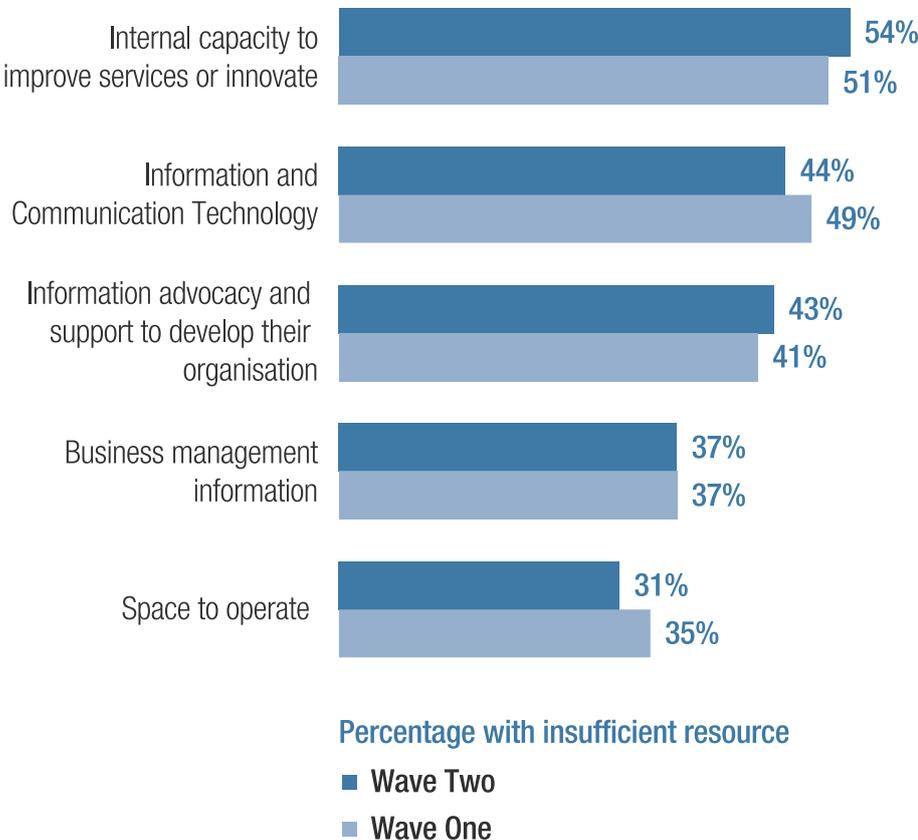
# SECTION 2: CHALLENGES AND OPPORTUNITIES FOR PROVIDERS

## 1. A SIGNIFICANT PROPORTION OF ORGANISATIONS HAVE INSUFFICIENT ORGANISATIONAL RESOURCES AND MOST HAVE DIFFICULTY RECRUITING STAFF

**Figure 2:**  
Insufficient organisational resources

The challenges and opportunities for disability service providers relate to organisational resources, human capital, financial resources, strategy, demand and competition with broader implications for sector development and market design.

Not surprisingly, organisations with internal capacity and capability are well placed to achieve their objectives and satisfy the growing demand. However many organisations are facing significant challenges especially in recruiting and to a lesser extent retaining staff.



## ORGANISATIONAL RESOURCES

Just over half (53 per cent) of organisations expect they will have the resources they need to meet their requirements. This is influenced by a distinct lack of sufficient resources over the previous six months, with a sizeable proportion of organisations reporting insufficient resources across many areas of their organisations (see Figure 2).

## 2. MOST ORGANISATIONS HAVE SUFFICIENT FINANCIAL RESOURCES BUT MATCHING INCOME TO INCREASING EXPENSES IS A GROWING CHALLENGE

The NDIS demands greater use of technology and more diverse service offerings that respond to changing consumer expectations. Without innovation, Information and Communication Technology or even the space to operate their business, organisations will experience significant challenges in making the transition.

### HUMAN CAPITAL

While some employers are growing their disability workforce, many organisations expect to experience difficulty in relation to staff recruitment (64 per cent in Wave Two) and retention (39 per cent in Wave Two).

The profile of the workforce for disability is changing, with organisations responding to uncertainty and fluctuating patterns of demand by hiring more casual staff. Three-quarters of organisations reported recruiting for casuals (similar to the 76 per cent in Wave One) with half reporting the number of casuals had actually increased (up from 36 per cent in Wave One).

Employers were most likely to experience difficulty recruiting for allied health staff (66 per cent of organisations in Wave Two) and leaders and managers (60 per cent in Wave Two, down from 68 per cent in Wave One).

Almost two-fifths (38 per cent) of organisations experience difficulty retaining their volunteers, on par with the results from Wave One (37 per cent).



Around two-thirds (64 per cent) of organisations had sufficient or more than sufficient financial resources (60 per cent in Wave One), with slightly fewer expecting this to continue over the next six months (55 per cent for both Wave One and Two).

One in five organisations expect a decline in their income overall (down from 28 per cent in Wave One), while more than three-quarters (77 per cent) anticipate an increase in expenses.

## SOURCES OF INCOME

Organisations reported income from a range of sources, both government and non-government.

Almost all reported income from state government (91 per cent), just more than half had income from federal government (56 per cent) and a third were receiving income from the NDIS (34 per cent).

Other sources of income were

- returns from investments (82 per cent);
- fees for service from clients (79 per cent);
- philanthropy and donations (74 per cent);
- membership fees (69 per cent); and
- income from Federal Government, excluding the NDIS (56 per cent).

A lesser number of organisations receive income from business sponsorship (49 per cent) and trading or commercial activities (38 per cent). This profile of income sources is consistent with Wave One.

The composition of income had little effect on the sufficiency of financial resources, with one exception. Those that reported they had sufficient income were considerably more likely to have had returns from investment (86 per cent compared with 73 per cent, consistent with Wave One findings).

One-quarter of organisations reported a decline in their philanthropy and donations, however this is lower than in Wave One (34 per cent). Nonetheless, responses from the follow-up qualitative survey highlight views that the implementation of the NDIS may be crowding out philanthropy and voluntarism as donors and volunteers perceive there will be sufficient funding for services and paid staff. Longer term trends are required to determine whether philanthropy levels are being impacted by government investment in disability services.

## SOURCES OF CAPITAL

Almost all organisations have working capital and financial reserves (94 per cent and 90 per cent of organisations), while relatively few use debt/loan finance (37 per cent). These results were consistent with Wave One findings.

The following comments highlight the different approaches to capital formation being used in the sector, as well as some of the barriers to raising capital for disability service providers.

“Our organisation has been in receipt of only government funds to provide service and as such we are not able to utilise efficiencies and savings to leverage growth strategies as any savings are considered government funds. There are no incentives under the current system to be efficient in operations.”

“As a not-for-profit organisation with only government tenders and having had a few years bad financials we are unable to access finance so if we can't get money from somewhere I don't see how we will survive in the new age.”

“I don't think any service would look at using debt to finance growth in these uncertain times of NDIS.”

“We are currently looking at selling off a key asset to fund the organisation's transition to the NDIS and remain viable, however there are significant issues re: the property deed with the Department and its terms and conditions. It appears that there is a strong intent to recoup equity which will make it impossible for the organisation to proceed with its strategic plan and remain viable.”

“We think we have the funds to invest for the future and have not counted out using debt.”

“Have sufficient capital to invest without need to borrow.”

“Our organisation is using past fundraising reserves and investments. However, we anticipate that our organisation will be run as a business in future under the NDIS. It will remain a charity but not for profit, not for loss.”



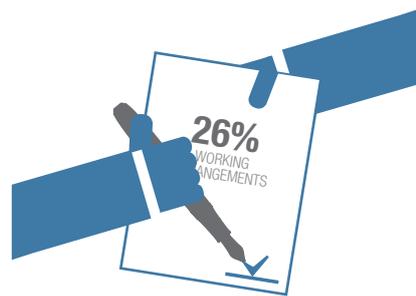
### 3. STRATEGIC FOCUS ON GROWTH AND PARTNERSHIPS BUT FOR SOME IT IS ALL ABOUT SURVIVAL

Organisations are looking to pursue growth strategies however insufficient capital and risk averse organisational cultures are inhibiting implementation.

#### FOCUS ON EXPANSION

Almost all organisations (93 per cent for both Wave One and Two) have a strategic focus on improving their productivity. However, less than half think they have the internal resources to improve their services or innovate (46 per cent and 49 per cent for Waves One and Two respectively).

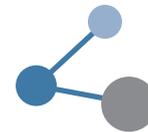
Similarly, the majority of organisations (68 per cent) expect to increase the scale and/or range of services and are investing for growth (77 per cent and 71 per cent for Wave One and Two). However, 45 per cent of organisations in Waves One and Two reported that they expect to have insufficient financial resources over the following six months. This suggests that growth strategies will be impeded for some organisations unless additional finance is obtained.



**26%**  
WORKING  
ARRANGEMENTS



**15%**  
PARTNERSHIPS



**11%**  
CONSORTIA



**6%**  
MERGER &  
ACQUISITION  
ACTIVITY

Only 16 per cent of organisations are looking to use debt finance to grow or change strategy (down from 21 per cent in Wave One). Most organisations are therefore looking to grow through use of their own financial reserves.

Reports from the qualitative research reveal a substantial proportion of these organisations have financial reserves or can access external capital, however others face significant barriers due to weak balance sheets, risk averse boards, and inability to access external capital.

There was also concern that assets owned jointly with government were not considered when organisations are looking to access debt finance. This prevented organisations from using the latent collateral in their property assets.

The disability sector is largely focused on growth, but the qualitative feedback suggests frustration at the lack of timely, relevant information about emerging market opportunities that would ordinarily inform robust strategy and business planning.

## PARTNERSHIPS AND COMPETITION

One-quarter of organisations (26 per cent) had entered into some sort of joint working arrangements. These were predominantly through partnerships (15 per cent of all organisations) and consortia (11 per cent) with a smaller proportion (6 per cent) being part of merger and acquisition activity. Among those who had not already entered into a joint working relationship, 18 per cent of organisations had plans to enter a joint working relationship in the following six months (down from 27 per cent in Wave One). This highlights that whether it is to increase impact, improve funding or reduce costs, a staggering 41 per cent of organisations are doing or intend to do joint work.

Almost all organisations (88 per cent) expect competition to increase over the following six months. More than half (60 per cent in Wave Two, up from 49 per cent in Wave One) of organisations reported increased competition from new for-profits over the past six months, while 51 per cent saw increased competition from new not-for-profits in the sector (49 per cent in Wave One). Around one-quarter (28 per cent in Wave Two and 22 per cent in Wave One) of organisations had noticed decreased competition from government agencies.

**“I’m not sure what will happen with our service when NDIS comes in. There are many support services rearing their heads in our community.”**

## FOCUS ON CONSOLIDATION

A small proportion of organisations (12 per cent in Waves One and Two) stated that they are not focused on growth, with qualitative feedback revealing these organisations were focused on a consolidation strategy instead. A very small number of organisations actually reported that they are preparing to get out of the disability sector (2 per cent in Wave Two and only 1 per cent in Wave One).

**“As an organisation we will focus on growth when there is certainty as to how the NDIS will progress. We are currently focusing on stabilising and strengthening current structures and practices.”**

**“We need to increase efficiency (back office), improve information systems and reporting, identify optimum organisational structure and develop more effective communication pathways BEFORE we focus on growth.”**

**“Survival is more important than growth at this stage.”**

**“Focus has been and always will be on delivery of sound services to clients, not the number of clients.”**

There was also a perception by some organisations that government preferred large organisations.

Albeit noting that for many organisations a consolidation strategy was appropriate, some organisations stated that the lack of a focus on growth could affect staff morale and lead to attrition of leaders and managers.

## UNMET DEMAND FOR SERVICES

A significant majority (66 per cent and 70 per cent in Wave One and Two respectively) of organisations experienced increased demand, which almost half (45 per cent in Wave Two and 49 per cent in Wave One) were not able to satisfy. Many expect this demand to continue to increase (78 per cent and 80 per cent in Waves One and Two).

**“Demand for our services continues to grow however government funding and therefore our viability ceases at the end of the year unless we get funding from elsewhere.”**

**“Current level of State Government funding is not meeting the needs of people with a disability. Our unmet needs register increases on a weekly basis.”**

## 4. NDIS REGISTERED ORGANISATIONS ARE RESPONDING TO DEMAND AND INVESTING TO GROW

Organisations registered to provide NDIS supports are more likely to report looking to invest in growth (83 per cent compared with 73 per cent for organisations not registered) and to report needing additional staff to support this growth (60 per cent compared with 46 per cent).

Registered organisations were more likely to expect sufficient financial resources in the future (61 per cent compared with 52 per cent), likely due to increased overall income among such organisations over the previous six months (45 per cent compared with 39 per cent).

Registered organisations were considerably less likely to have had difficulty recruiting for trustees, directors and management committee members (45 per cent compared with 59 per cent), a trend also apparent in Wave One. This suggests that assisting in the governance of organisations operating in the NDIS is attractive to individuals being appointed at this level. However, registered organisations were more likely to experience difficulty recruiting for allied health staff (72 per cent compared with 61 per cent).

Registered organisations were somewhat more likely to have seen increased demand for services (74 per cent compared to 68 per cent for organisations not registered), consistent with the results for Wave One. Consequently, registered organisations are more likely to have plans to increase the scale and/or range of services (76 per cent compared with 64 per cent).

Registered organisations also experienced greater competition, particularly from established not-for-profits within the sector (63 per cent compared with 42 per cent). Along with greater competition, registered organisations have plans for collaboration. Registered organisations were considerably more likely to have plans for joint working over the following six months (34 per cent compared with 9 per cent), consistent with the results from Wave One.

Even among those already registered, 38 per cent agreed that the NDIS should be slowed down, however this was somewhat lower than organisations

not registered (44 per cent). Similarly, registered organisations were somewhat more likely to feel that the policy environment was uncertain (82 per cent compared with 76 per cent).

Taken together, these findings indicate that organisations that have transitioned some or all of the operations into an NDIS trial site have greater business confidence than organisations not directly exposed to the NDIS operating environment.

**SECTION 3:  
CHALLENGES  
AND OPPORTUNITIES  
FOR PUBLIC  
POLICY MAKERS**

## SECTION 3: CHALLENGES AND OPPORTUNITIES FOR PUBLIC POLICY MAKERS

The Business Confidence Survey has identified a range of key challenges and opportunities for public policy that relate to implementing a major change program and managing the speed of NDIS implementation.

### 5. THERE IS SUPPORT FOR THE REFORMS BUT ALSO UNCERTAINTY AND CONFUSION

A significant majority of disability service providers consider the policy environment to be uncertain (78 per cent in Wave Two and 81 per cent in Wave One) and confusing (71 per cent in Wave Two and 73 per cent in Wave One). There is still strong support for the reform however, with 64 per cent agreeing that the policy reforms in the sector were heading in the right direction (65 per cent in Wave One).

A majority of organisations believe there are too many rules and regulations for their organisation to follow (61 per cent in Wave Two and 68 per cent in Wave One). Similarly, only one in ten organisations (13 per cent for both Waves One and Two) believed that government is anticipating or responding to their needs.

Through the qualitative research, organisations expressed concern that the NDIS does not recognise that many people with disability have complex needs which require high quality and consistent case management, and that the system needs to learn how to address the needs of vulnerable people. There were similar concerns relating to the needs of people with disability in remote areas.

“ONLY ONE IN  
TEN ORGANISATIONS  
BELIEVED THAT  
GOVERNMENT IS  
ANTICIPATING OR  
RESPONDING TO THEIR  
NEEDS.”



**“The NDIS is not meeting the needs of many vulnerable participants. They are not ‘learning and building’ they are extremely unresponsive to concerns raised and focus on spin. This is quite disillusioning.”**

Organisations also noted that there is a lack of clarity and understanding among their clients which impacts on their confidence that they will continue to receive high quality and appropriate services.

**“Families have expressed the level of services they get now will be affected by the NDIS. At present most families get five days per week in their day program. Whilst the overall concept of quality programs must improve, the questions I often get asked is ‘will we get the level of days I get now?’ Some families have cited the UK model to me and are concerned about the success of that program. I often feel caught in the middle about a system that needed review and the impact it will have on our families.”**

## 6. ORGANISATIONS ARE DIVIDED ON THE SPEED OF IMPLEMENTING THE NDIS

Organisations remain polarised on the pace of NDIS implementation; 43 per cent of organisations would like to see the implementation of the NDIS slowed down and an equal proportion would like to see it implemented as planned.



**43%**  
SLOW  
DOWN



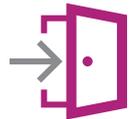
**43%**  
PROCEED  
AS  
PLANNED

## PROCEED AS PLANNED WITH NDIS IMPLEMENTATION

Through the qualitative follow up survey, organisations expressing a preference for continuing as planned **identified the following reasons:**

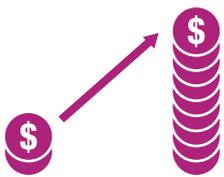
- the NDIS is **better than existing** mechanisms;
- it will **provide opportunities** and will encourage collaboration and mergers and acquisitions;
- it will enable organisations to **follow through on planned investments** which were developed from current timelines;
- it will **remove unsustainable organisations.**

NDIS



There is also a concern that if there is a delay in implementing the NDIS, state government funding may still be withdrawn resulting in a gap in funding.

Organisations that would like to see the implementation of the NDIS proceed as planned **were more likely to:**



· expect their **overall income to increase** (46 per cent compared to 34 per cent) and have had increased income from a variety of sources over the past six months.



· report having **sufficient internal resources** such as business management information (70 per cent compared to 53 per cent); information, advocacy and support to develop their organisations (62 per cent compared to 50 per cent); and internal capacity to improve services or to innovate (51 per cent compared to 39 per cent).



· expect to **increase their organisation's scale** and range of services (75 per cent compared to 65 per cent).

· believe that the policy reforms are **heading in the right direction** (81 per cent compared to 47 per cent).



· hold a **positive view** of the operating environment, specifically: that the disability sector as a whole (68 per cent compared to 40 per cent), not-for-profit sector as a whole (66 per cent compared to 41 per cent) and the wider Australian economy (73 per cent compared to 52 per cent) will improve over the next six months.

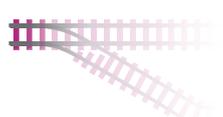


## SLOW DOWN NDIS IMPLEMENTATION

Organisations expressing a preference for slowing down the implementation of the NDIS **identified the following reasons** through the qualitative research:



· the need for **better transition processes** and the funding of transition especially in relation to the Information, Linkages and Capacity Building market segment;



· scheme **infrastructure is insufficient**;



· there needs to be **better research on demand for local services**; and

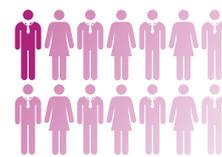


· the need for **further education of participants** with consumer expectations is rising faster than supply.

Organisations also saw value in properly reviewing the trial site experience because it would allow early identification and resolution of problems and enable solid foundations to be established before scaling up.

Organisations that would like to see the implementation of the NDIS slowed down **were more likely to:**

· report having had **difficulty recruiting** a wide variety of roles, and have experienced difficulty retaining staff in the same roles.



· report having experienced **increased competition** from new for-profit organisations (65 per cent compared to 54 per cent) and new not-for-profit organisations (54 per cent compared with 46 per cent).



· report having had an **increase in administrative expenses** (75 per cent compared to 56 per cent) and overall expenses on a 'per client' basis (77 per cent compared to 65 per cent).





· believe the **policy environment is confusing** (81 per cent compared to 56 per cent) and uncertain (88 per cent compared to 67 per cent).



· believe there are **too many rules and regulations** to follow (81 per cent compared to 46 per cent).



· **not be focused on growth** (16 per cent compared with 6 per cent).

Investigating the differences between organisations that want the NDIS implementation to slow down or remain on schedule suggests that the underlying health of organisations has influenced their views on the speed of implementation of the NDIS.

The qualitative feedback also highlights that opinions about the speed of implementing the NDIS are being influenced by the effectiveness of planning and communications.

“Whilst I believe the NDIS should not be slowed down I do believe that the Government should be doing a lot more to support organisations outside of the trial site to transition AND assist and educate individuals and families to understand the new scheme too. There is a great reliance on people to access the website for information but many people we support do not have the skills to or ability to access a computer to get this information.”

“We would benefit from definitive knowledge on the way the NDIS is to be rolled out and when. There is ‘discussion’ about slowing down the roll out - agencies need to know what this means to enable proper forward planning.”

## 7. NEED TO BUILD THE FINANCIAL STRENGTH OF ORGANISATIONS

There are a number of areas where organisations want to improve but are unable to without external support. The NDS Business Confidence Survey has revealed a range of barriers to achieving growth and sustainability which organisations will struggle to overcome without external support from government, financial intermediaries and representative bodies.

### FUNDING AND ACCESSING CAPITAL

Many disability service organisations, especially less confident organisations, do not have sufficient financial resources and do not have access to capital to improve or increase the scale of their services. The qualitative follow up survey showed that for some organisations the ideal funding mix for growth is perceived to be retained earnings, philanthropy/grants and debt finance. In relation to debt finance, some organisations may need assistance to identify suitable loan products, evidence their financial strength, and build an appetite or willingness to engage in loan finance amongst key decision makers (e.g. Boards).

Organisations also thought that funders could play a role in terms of facilitating the building of financial reserves through removing claw back mechanisms which have previously prevented organisations from retaining surpluses where contract outcomes

have been delivered. Similarly, the transfer of government equity in property deeds is thought to play an important role in capital formation.

**“We are currently looking at selling off a key asset to fund the organisation’s transition to the NDIS and remain viable, however there are significant issues re: the property deed with the Department and its terms and conditions. It appears that there is a strong intent to recoup equity which will make it impossible for the organisation to proceed with its strategic plan and remain viable.”**

The process for transitioning from block funding to individualised funding for providers entering the NDIS has been managed differently by each state and territory government. The qualitative feedback suggests that approaches used in some states have created significant cash flow difficulty for providers. Jurisdictions that have provided upfront payments to providers during transition have given organisations sufficient time to prepare for arrears based funding.

## IMPACT OF NDIS PRICING

Organisations expressed concern over the pricing of some NDIS supports and uncertainty surrounding the deregulation of pricing and its consequent impact on organisational planning and survival.

**“The uncertainty and structure of pricing is still a huge concern and a major strategic threat. There are many organisations that will not survive the transition because a fair system has not been established in the first place. There will definitely be changes in the sector and a risk of organisation/market failure.”**

**“It is very difficult to plan for the future under the current NDIS pricing structure. We expect to increase investment once we are assured that pricing will be deregulated. Only then can we determine the market returns.”**

Organisations are therefore seeking prices that reflect the full cost of service delivery and an articulated plan on a staged approach to deregulation.

## HIGH PERFORMANCE CULTURE

Risk averse organisational culture was also identified as an issue for financial sustainability, however it has much wider implications especially in relation to strategic and operational planning and governance, leadership and decision making.

Organisations are therefore looking for support to develop and ensure they are able to attract leaders and managers to build high performing workplaces.

NDS gratefully acknowledges the support of the NSW Government in establishing the Centre for Applied Disability Research.

