



NDS Workforce Census

Key Findings June 2020

An unprecedented time for the disability sector

The six month period in which this census covers, has been an unprecedented time for the disability sector. At the start of 2020, the sector on the east coast in particular faced challenging times with the bushfires. Then in March, the nation experienced the first of the COVID-19 lockdowns, which at the time of writing, was still a part of life in Victoria.

The government response (both federal and state), applicable to the disability sector, has included (but not limited to): JobKeeper for organisations experiencing a marked decrease in revenue; one-month advance cash-flow relief payments; a temporary 10 per cent COVID-19 loading on selected supports for up to six months; flexibility regarding cancellations; access to the National Medical Stockpile of Personal Protective Equipment (PPE); a new online service to help providers and participants find additional support workers; and changes to visa arrangements so that international students currently working with a disability service provider can work more hours.

Forty two per cent (n=173) of respondents to the NDS Annual Market Survey thought that the sector was well supported during recent emergency events. In addition, 91 per cent (n=373) of respondents believed that their organisation had been able to respond well.

But what does that mean for the disability sector workforce?

Permanent workforce continues to increase in the disability sector

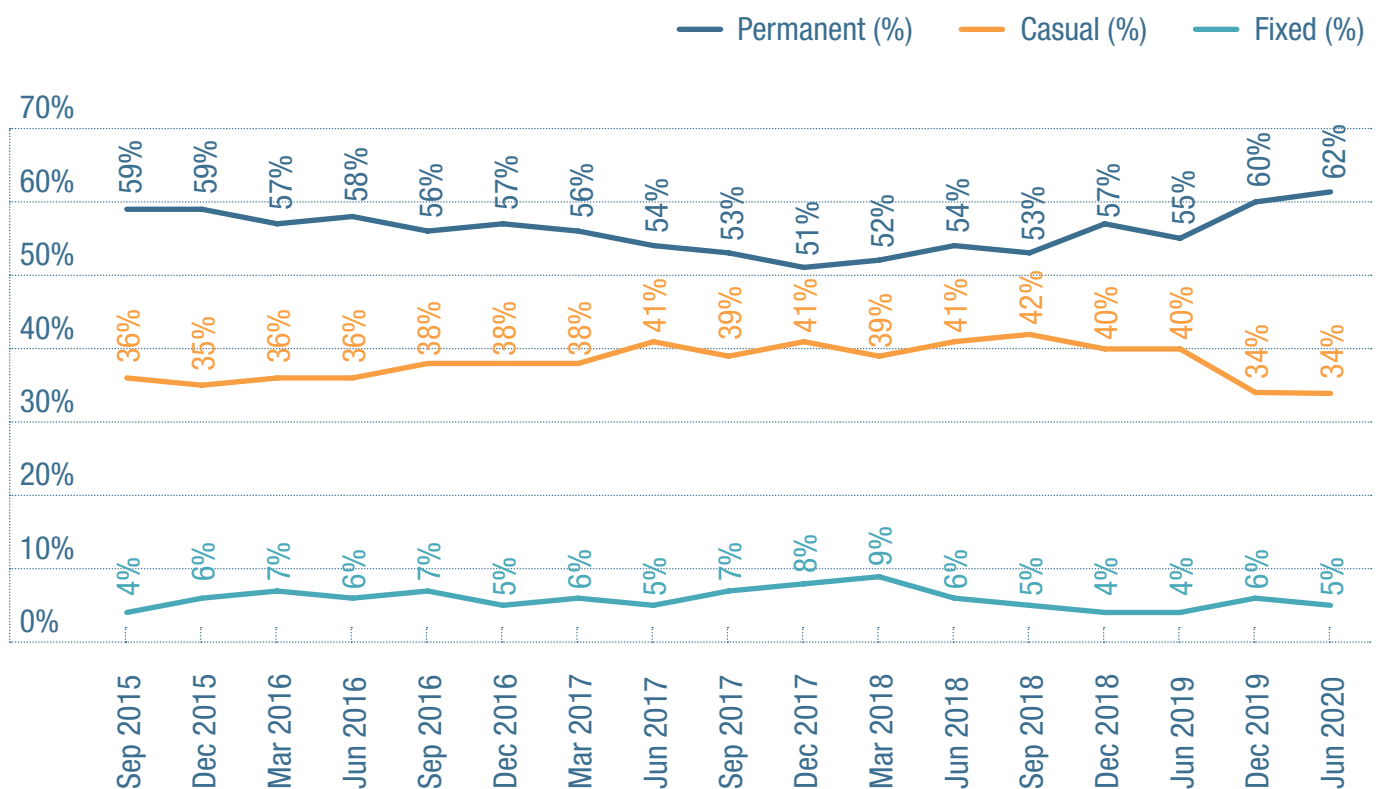
The shift towards permanent employment highlighted in the December 2019 Workforce Census has continued. Permanent employees account for 62 per cent of the latest sample, the highest level since data collection began in 2015.

The shift was most marked in Queensland and Western Australia, contrasting with the previous period. NSW maintained a high level of permanent employment but fell slightly to 65 per cent, which is still above average. Victoria followed trend with a rise from 59 per cent to 64 per cent.

The move towards permanent employment was previously attributed to consolidation following a period of comparative volatility with the NDIS roll-out when casual employment was much more common. Rulings on conditions for casual workers over the past year or so will be contributing to the decrease in casual worker numbers in the disability sector.

However, the data does not tell us about the impact of JobKeeper payments, or the limiting of movement of workers between providers (to avoid COVID-19 cross infection), especially in Victoria.

Figure 1 – Type of employment (per cent)

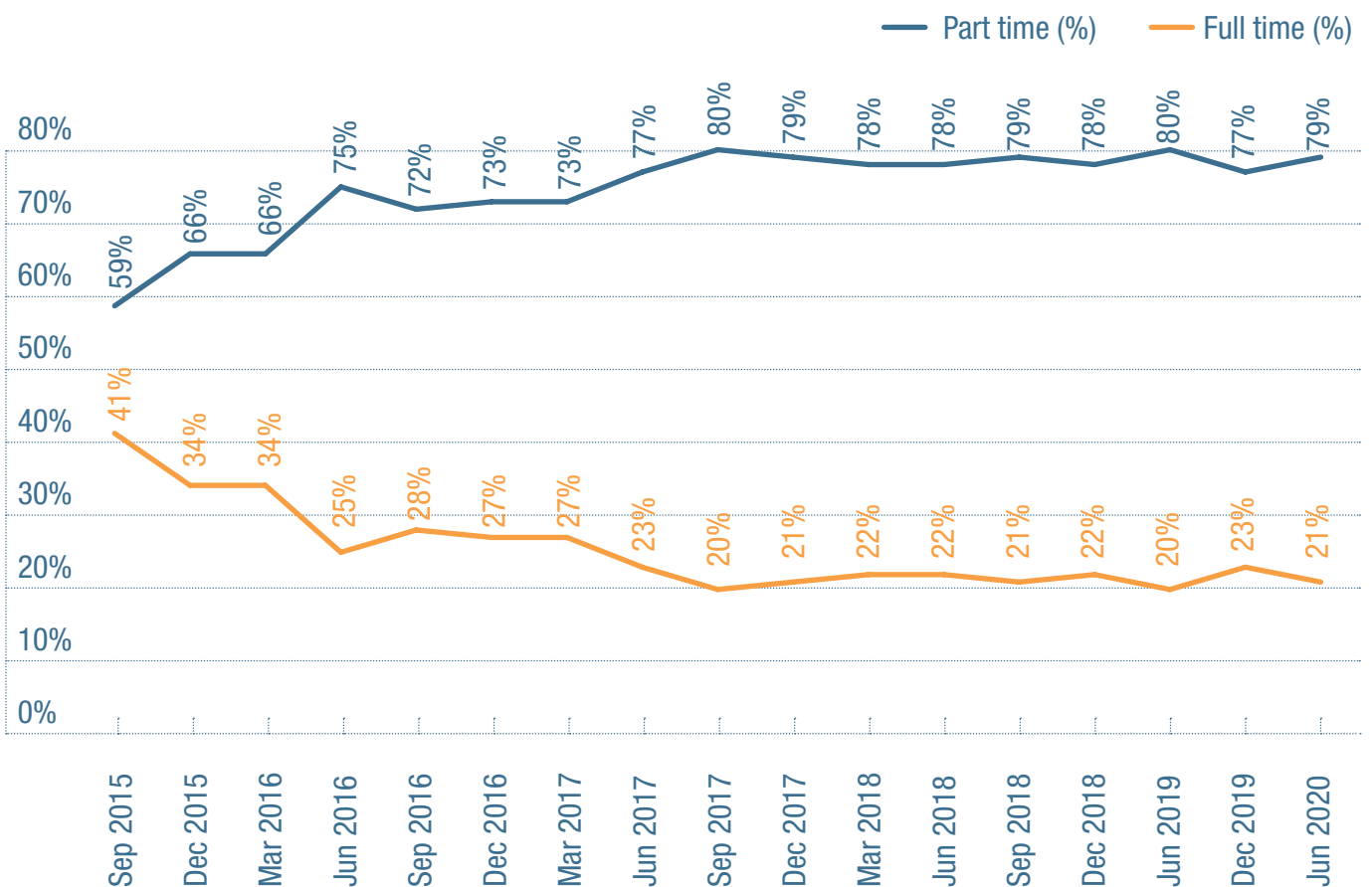


Part-time permanent employment share continues to rise

The percentage of part-time work increased to 79 per cent, up from 77 per cent in the previous period. This uplift was entirely accounted for by disability support workers who constituted 93 per cent of the workforce surveyed, and of whom only 18 per cent were working full-time from January to June 2020. The percentage of Allied Health Workers working full-time actually rose from 55 per cent to 57 per cent in this period.

The most marked falls in the share of full-time employment were in Queensland and South Australia, with Victoria showing an opposite trend. Operating conditions changed distinctly between data collections, with COVID-19 causing the suspension and cessation of many services - community and day programs, home visits and more - and the rapid adaptation of other services to meet pandemic restrictions. This widespread disruption was likely a significant factor in the shift away from full-time work.

Figure 2 – Full-time permanent and part-time work: employment share (per cent)



A mixed picture with turnover rates

The latest data collection indicates there is a small decline in the turnover of permanent roles, from 10 per cent to 8 per cent. By contrast, casual turnover, which had risen sharply in the previous survey, fell back from 28 per cent to a still-high 22 per cent. In WA, the casual turnover rate increased from 19% to 37%. Caution, however, must be taken when interpreting the WA results due to the relatively small sample size which answered this particular question, which may have an impact on the spike. Previously, the jump in casual turnover was attributed to some casual workers increasingly being moved into permanent roles, and those remaining casuals being more likely to be let go, or go on their own accord. The latter trend may have been tempered by uncertain employment conditions arising from the economic impacts of COVID-19. The JobKeeper Payment, introduced in the middle of the survey period on 30 March, would have undoubtedly had an impact, but not one that can be quantified.

Table 1 – Turnover rates by forms of employment

	June 2016	June 2017	June 2018	June 2019	June 2020
Casual	11%	10%	6%	7%	22%
Permanent	4%	5%	6%	9%	8%
n=	170	197	176	118	212

All of which may help to explain why many providers still struggled to recruit and retain workers to the sector. The 2020 NDS Annual Market Survey found the challenge of recruiting and retaining competent staff is not getting any easier, despite the NDIS now being rolled out across the country (except WA, noting that the NDIS Commission will begin regulating WA-based providers from December 2020).

In the Annual Market Survey, we asked respondents to rate how easy or difficult it had been to recruit or retain staff in particular roles. When recruiting staff, respondents seem to have found it more difficult to recruit for frontline support worker and allied health roles compared to recruiting for administrative roles.

Eighty-seven per cent of respondents found it moderately or extremely difficult to fill Psychologist roles, 86 per cent for Occupational Therapist roles, 83 per cent for Speech Therapists, and 76 per cent for Physiotherapists. These were the roles with the highest proportion of difficult responses.

The roles with least difficulty to recruit were Finance (25 per cent), IT (28 per cent), HR (33 per cent), and Marketing (34 per cent).

As with previous years of the NDS Annual Market Survey, respondents report it was easier to retain staff than to recruit. There was a similar pattern for staff retention. Staff in administrative roles were generally easier to retain, whereas there was some difficulty with retention for frontline roles.

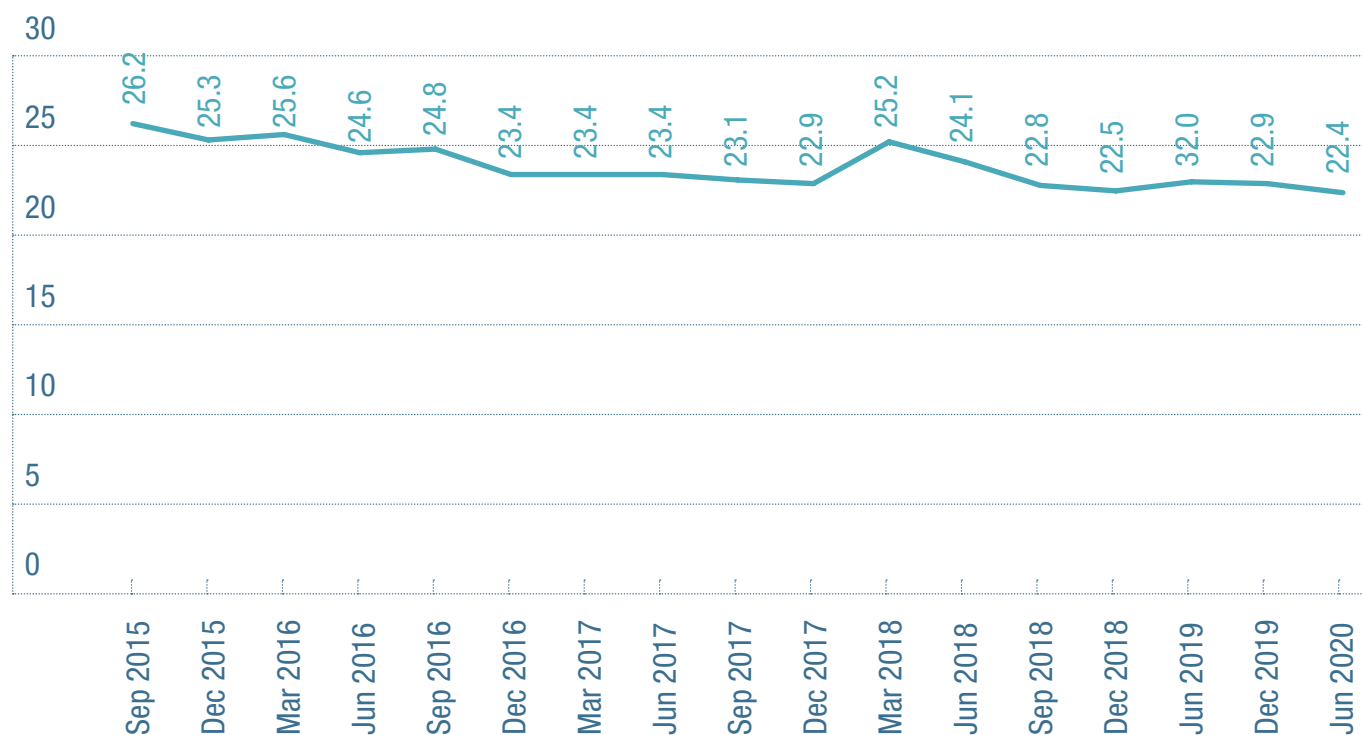
The average hours per week increased for Allied Health Workers but decreased for Disability Support Workers

In this period, the average hours of work per week per worker rose for Allied Health Workers, whereas it fell for Disability Support Workers.

Allied Health Workers' average hours rose to 27.4 hours per week, driven by increases in all states and territories except Victoria and Western Australia. It is likely that this result was influenced by the rapid adoption of telehealth/teleconferencing technology by many organisations during this period. This development would enable more consultation hours by eliminating travel time, but we do not yet have sufficient data to confirm whether this is the reason for the rise.

In the case of Disability Support Workers, there were falls in average hours in every state and territory apart from Queensland. This decrease could be due to the reduction in services during lockdown.

Figure 3 – Average hours of work per week per worker

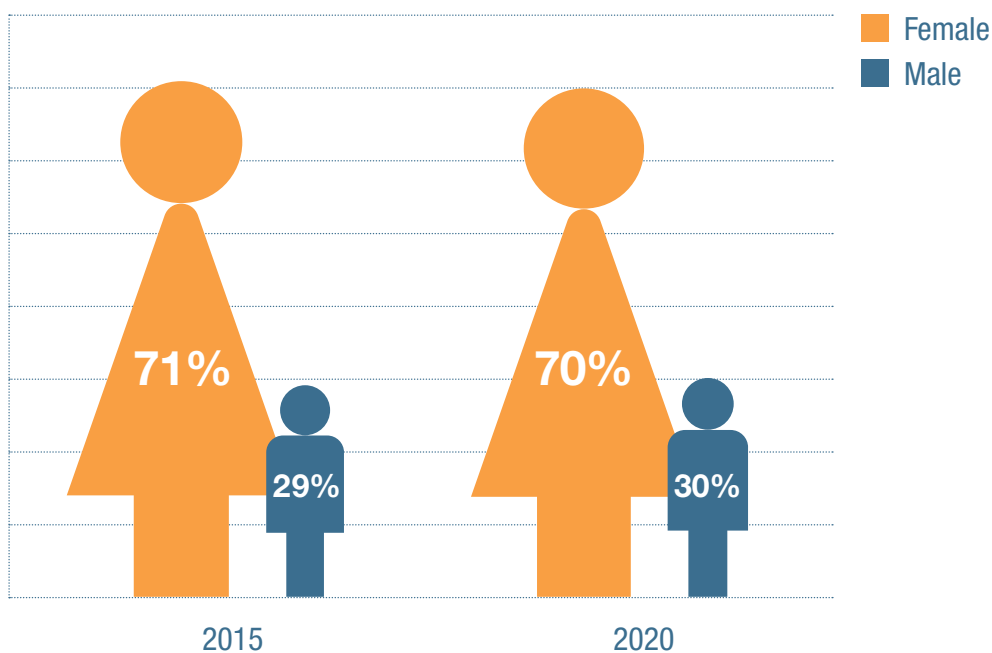




Female dominated workforce in the disability sector

The gender imbalance in the disability workforce continues and is a concern. As at June 2020, 70% of the sample were female and 30% male. It would be preferable to have a workforce profile that more closely reflects the NDIS participant population. The June [NDIS quarterly report](#) highlighted that 62 per cent of participants were male; 37 per cent female and 1 per cent identified themselves as other. It is not news to the sector that more male workers are needed. The NDIS Workforce Plan, now in development, must bring about a closer match between the workforce and the people with disability with whom they work.

Figure 4 – Female vs male staffing ratios



Workforce age

The disability workforce is getting younger as the NDIS market matures. As with its female/male ratio, it is also desirable that the age profile of the disability workforce resonates with that of NDIS participants as much as it can. The percentage of workforce aged 44 and under has risen slightly from 54 per cent in 2015 to 58 per cent in 2020.

Table 2 – Age Profile

Age group	2015	2020
15-24 year olds	10%	11%
25-44 year olds	44%	47%
45-54 year olds	25%	22%
55+	21%	21%
N=	23,183	35,636

As with the gender profile of the workforce compared to the NDIS participant profile, the age profile also varies between workforce and participant. Using the [June 2020 NDIS participant profile by age](#), participants may not be able to have support workers close to their own age. In particular, NDIS participants in the 15-24 year old age group may struggle to find, if they wish, support workers who are within their own age group.

Table 3 – NDIS participant profile and Workforce Census profile by age

Age group	NDIS Participant profile	Workforce Census workforce profile by age
15-24 year olds	27%	11%
25-44 year olds	30%	47%
45-54 year olds	18%	22%
55+	25%	21%

Notes: Excludes participants aged 0-14 years old.

Source: NDIS Participant Profile, NDIS Quarterly Report to disability ministers, page 110

Spotlight Topic - The impact of the change to international student visa work conditions

On 23 April 2020, the Australian Government announced changes to student visa work conditions to help boost frontline health efforts to tackle COVID-19.

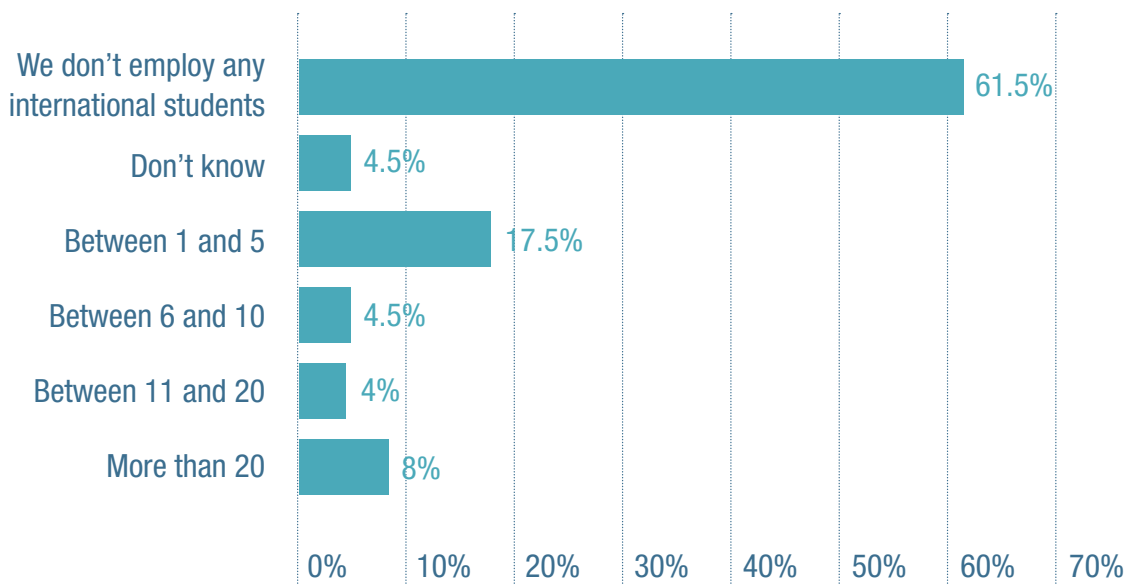
International students studying relevant medical courses would be exempt from the 40-hour per fortnight work limit, if working in support of COVID-19 health efforts and at the direction of the relevant health authority. International students currently working for registered disability service providers would also be exempt. NDS actively lobbied to ensure the disability sector was included as part of this arrangement.

Provider awareness of the visa change but the majority don't employ international students

Fifty-five per cent (n=111) of respondents knew about the change and 45 per cent (n=90) did not know about the visa change impacting eligible international students.

One in three respondents (34 per cent) stated they employ international students, while five per cent were unsure. Only eight per cent of providers have more than 20 international students on their payroll.

Figure 5 – Number of international students employed



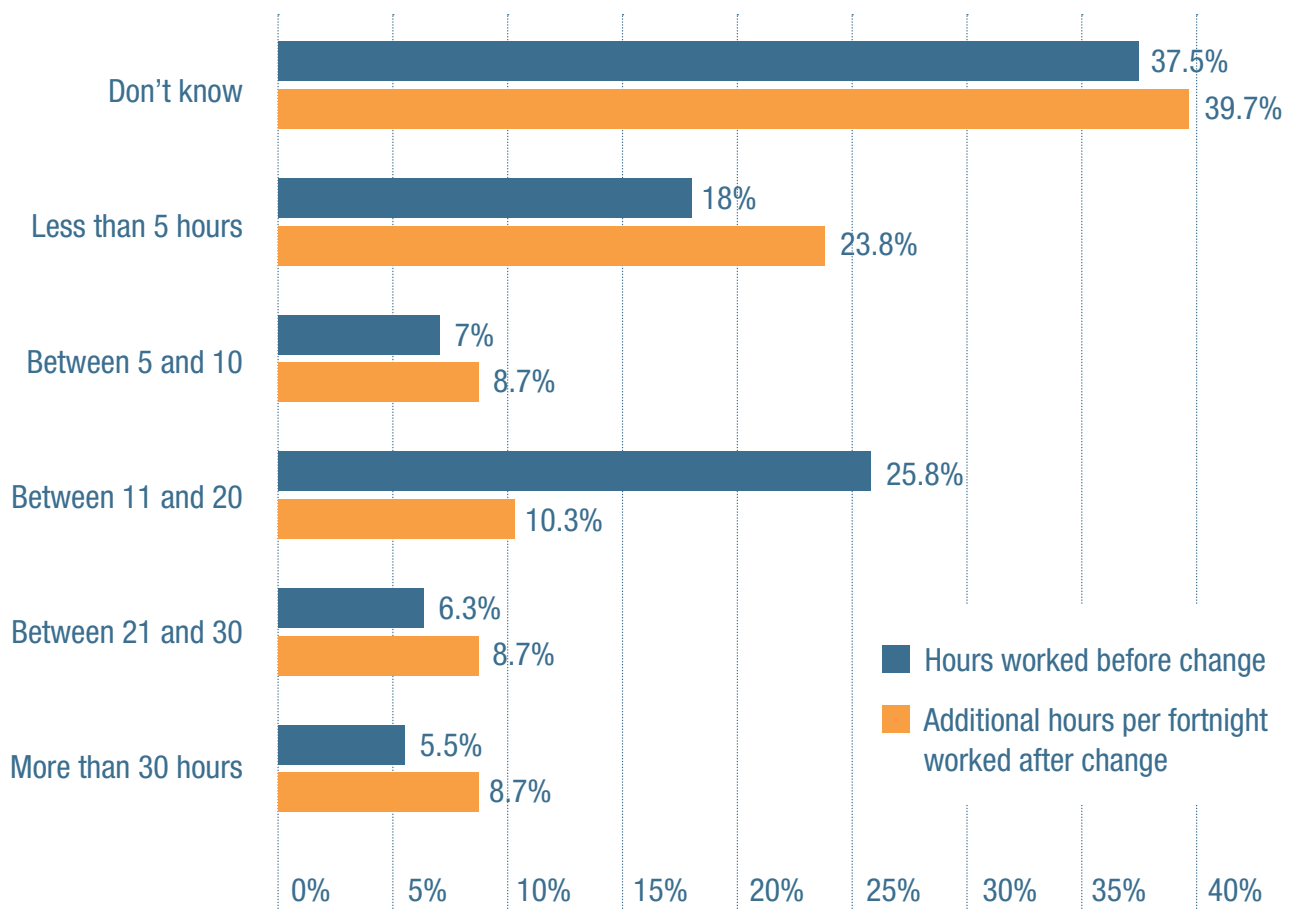
The change in visa conditions to allow international students to work additional hours proved important during this period. Before its enactment, almost 80 per cent of those employing international students did so for 20 hours or less a fortnight. Only 10 per cent came close to the previous allowable limit of 40 hours per fortnight, by employing students for 30 hours or more.

However, after the change, 16 per cent of those respondents took the opportunity to have their students work an additional 30 hours per fortnight, and a further one in six for an additional 20 hours per fortnight.

The survey question did not include an option of “zero additional hours”. However, even if all “Less than 5 hours” responses actually represented zero hours, it still means that 60 per cent of those employing international students increased their hours.

For some employers, the change in visa conditions for eligible international students has provided an important and welcome degree of flexibility during the extremely challenging conditions of the pandemic.

Figure 6 – Hours of work before and after the visa change



Conclusions

As the sector continues to navigate the COVID-19 pandemic, the next few months will be challenging for providers in determining sustainable workforce requirements in the sector. The impact of COVID-19 will continue to be felt by providers for some time (although the extension of JobKeeper until March 2021 will help mitigate some of the financial pressures). As reported in the State of the Disability Sector Report, the disability sector during 2020 has been resilient, innovative and resourceful in the face of challenges and change. A growing workforce that can meet these challenges will be pivotal in providing a high-quality service to people with disability.

Appendix A - Workforce Census methodology

The NDS Workforce Census fulfils a significant workforce data gap in the disability sector and helps to answer some challenging questions for the sector including are more people being employed as casual rather than permanent workers, or is there a different mix of skills or demographics. The Workforce Census is conducted every six months and asks participating organisations to report their current disability support and allied health workforces. This data allows NDS to track metrics such as the proportion of full-time, part-time, and casual workers, turnover rate, and demographic data such as gender and age range of the workforce. The Workforce Census also includes a Spotlight question to ask about important workforce-related issues within the sector at the time of the survey.

The current round of the Workforce Census was open from 24 August to 21 September 2020, alongside the NDS Annual Market Survey. The Census is hosted on Qualtrics and distributed to both NDS members and non-member organisations that provide services in the disability sector. Additional promotion of the Workforce Census was conducted during this time through NDS contact networks. Reminder emails were sent in the week prior to close of responses. There were 212 responses covering a total workforce of 38,811.

Ratios (such as turnover and average weekly hours worked per worker) were calculated based on organisation responses and presented in series with previous Workforce Census data to observe long term trends. Caution should be used when viewing trends for smaller states, or subgroups, as these groups will be more susceptible to the effect of extreme values. Outliers were eliminated from the analysis using thresholds based on the natural limits on responses. For instance, calculated weekly average hours worked values exceeding 100 were excluded. Values above this were judged to be unreasonably large, likely arising from errors in the values entered. The number of respondents can vary between questions as not every respondent answers each question in the survey, and thus the total displayed might differ from the totals presented in other figures.

For further information about the Workforce Census or to participate in the next data collection, contact NDS by email workforce.data@nds.org.au.