



# Australian Disability Workforce Report

July 2017



Findings from Workforce Wizard and carecareers – the  
best sources of disability workforce data in Australia

## Contact details

### Caroline Alcorso

National Manager, Workforce Development  
National Disability Services  
Level 19, 66 Goulburn Street Sydney NSW 2000  
Phone: 02 9256 3180  
[caroline.alcorso@nds.org.au](mailto:caroline.alcorso@nds.org.au)

### The carecareers Team

Level 19, 66 Goulburn Street Sydney NSW 2000  
Phone: 1300 637 637  
Fax: 02 9256 3123  
[info@carecareers.com.au](mailto:info@carecareers.com.au)  
[www.carecareers.com.au](http://www.carecareers.com.au)

## Acknowledgements

NDS gratefully acknowledges the expert advice and guidance of Dr Ian Watson in the design and establishment of Workforce Wizard, and the innovative work of Chris Were and Mozzler staff in creating Workforce Wizard as a convenient online application for disability service providers.

This data for this report was collected in part through the NDS Disability Workforce Innovation Network project 2014-16 which took place with the assistance of funding provided by the Australian Government. NDS also recognises the significant contribution of the industry in embracing Workforce Wizard, helping shape it and making it the successful tool it is today.

## About this report

This is the first edition of a twice yearly publication. The next edition will be published in February 2018.

© This publication is copyright

All rights reserved. Except as provided in the Copyright Act 1968 (Commonwealth), no use of this work, which is within the exclusive right of the copyright owner, may be made.

## About National Disability Services

National Disability Services ('NDS') is the peak body for non-government disability services. Its purpose is to promote quality service provision and life opportunities for people with disability. NDS's Australia-wide membership includes more than 1050 non-government organisations, which support people with all forms of disability. NDS provides information and networking opportunities to its members and policy advice to state, territory and federal governments.

# Contents

<b>Executive Summary</b> .....	<b>4</b>
<b>Introduction</b> .....	<b>6</b>
The sample .....	6
What's in this report.....	7
<b>Disability support workers: key findings</b> .....	<b>8</b>
Type of employment.....	8
Results by organisational size .....	9
Organisational growth .....	9
Workforce turnover .....	11
Distribution of turnover rates .....	13
Working hours .....	13
Age and gender distribution.....	15
<b>Allied health workers: key findings</b> .....	<b>17</b>
Types of employment.....	17
Organisational growth .....	18
Workforce turnover .....	18
Working hours .....	19
Age and gender distribution.....	20
<b>States and territories</b> .....	<b>21</b>
<b>Comparing the disability sector and aged care workforces</b> .....	<b>23</b>
<b>Spotlight topic: Recruitment trends and difficulties</b> .....	<b>24</b>
Recruitment difficulty - disability support workers .....	24
Reason for unfilled vacancies .....	26
Recruitment difficulty - allied health professionals.....	27
<b>Trends in advertised roles on carecareers</b> .....	<b>28</b>
The number of advertised job vacancies.....	28
Interest in roles in the disability sector.....	29
<b>Conclusion</b> .....	<b>31</b>
<b>Appendix</b> .....	<b>32</b>
Workforce Wizard methodology.....	32
carecareers usage and data .....	34

# Executive Summary

This report tracks six successive quarters of workforce data from NDS benchmarking tools, such as Workforce Wizard, and the carecareers job board. It presents the aggregate results for over 35,000 front line disability workers.

The report paints a picture of a sector growing rapidly and experimenting with work arrangements and recruitment approaches.

A trend toward more casual employment is visible. The data suggests moderate skill shortages reflect a healthy sector growing strongly.

## Type of employment

The report finds that the most common form of employment for disability support workers in the March 2017 quarter was part-time permanent employment (43 per cent of all workers), closely followed by casual employment (41 per cent). Full-time permanent staff made up only 12 per cent of the disability support workforce.

Our data shows that organisations, on average, grew their disability support workforces by 3.6 per cent over that quarter. This has been overwhelmingly driven by a growth in the casual workforce.

## Workforce turnover

Indicators such as labour turnover show relative stability, with casual turnover rates much higher and less predictable than those for permanent workers.

The average organisational permanent turnover rate has been relatively stable over time, sitting between 4.2 per cent and 4.7 per cent. Conversely, the average organisational casual turnover rate has been somewhat more variable since December 2015, and in the March 2017 quarter sits at 8.5 per cent, nearly twice the permanent rate.

Despite the benefits that flexibility gives organisations, data from Workforce Wizard shows that it comes at the price of higher turnover.

## Hours

Average working hours are recorded in Workforce Wizard as low, at 22 hours per week for support workers, and possibly reducing - suggesting poor utilisation of the existing workforce.

In the March 2017 quarter, organisations employed their disability support workers for an average of nearly 22 hours per week for each direct support worker, with a headcount to FTE ratio of 1.97 staff per FTE.

## Age and gender distribution

Women make up 70 per cent, on average, of the organisational workforce.

In terms of age distribution, the average organisation has one-fifth (21 per cent) of its

workforce aged 55 years and older. Nearly a quarter (24 per cent) of the disability workforce is between 45 and 54 years, compared with around 21 per cent for the Australian all-industry employed workforce.

## Allied health

Allied health professionals in the disability sector were most likely to be employed as full-time or part-time permanent workers (both 36 per cent in March 2017). Casual employment was considerably less common among allied health professionals than disability support workers (7 per cent compared with 41 per cent for support workers). However fixed term employment appears to be growing quickly.

The allied health workforce is a much younger workforce than disability support. For the average organisation in March 2017, 64 per cent of their allied health workforce was aged 25 to 45 years old. This workforce also had 89 per cent female staff.

## Disability vs. aged care workforce

Displaying a more gender and age-balanced profile and contrasting work arrangements, the disability workforce appears to be moving in a different direction to aged care.

- In the March 2017 quarter, 47 per cent of disability support workers were employed as a casual or on contract, compared to 10 per cent in aged care residential, and 14 per cent in aged community care.
- Some 30 per cent of disability support workers are men, compared to 10 to 11 per cent of direct care workers in aged care.
- 11 per cent of disability support workers are aged 16 to 24 years, compared to less than 3 per cent for aged community care.

Around 9 per cent of workers in residential aged care have second jobs, of which very few (0.2 per cent) are in disability. In community aged care, 16 per cent of workers have two jobs, and 2 out of the 16 per cent of these are in disability.

## Recruitment

Providers are successfully recruiting in high numbers, while also experiencing challenges as they adopt more person-centred approaches.

There were approximately eleven times as many positions filled as unfilled during the March 2017 quarter.

A common difficulty faced by providers appears to be the increasing specificity of job requirements for disability support positions, a result of providers tailoring jobs to clients under the NDIS.

## carecareers

The carecareers job board shows a clear growth trend in part-time and particularly casual roles, compared with uneven growth in full-time roles.

# Introduction

Australia's capacity to provide a quality workforce to meet the increasing workload that the National Disability Insurance Scheme (NDIS) demands is one of the significant challenges to the design of the scheme overall. In the 2011 Productivity Commission report 'Disability Support and Care', the foundation on which the NDIS was designed, the authors found no reliable estimate for the exact size of the disability support workforce. It is well known that the ABS labour force and workplace data commonly used in other industries to assess workforce trends are not available for the disability sector.

National Disability Services, with funding from the Department of Education and Training, sought to fill this evidence gap with the introduction of Workforce Wizard in late 2015. Workforce Wizard is an online tool aimed at human resource managers and executives within the disability sector, who enter their organisation's key workforce metrics on a quarterly basis. A key feature of Workforce Wizard is that it is short, aiding retention of users, and benchmark reports are automatically generated as both an incentive to users but also a guide to further educate the disability sector about workforce strategy.

Since launching in October 2015, Workforce Wizard has opened for data entry every quarter. Data entry is open for two weeks, after which the Workforce Wizard team clean the data. When finalised, benchmark reports are made available to each participating organisation.

Organisations are able to enter data based on workforces of their own defining. For the purposes of this report, if an organisation entered data for more than one workforce, those workforces were consolidated into one organisational result. This is to avoid multiple counts of a single organisation with more than one (and sometimes duplicate) workforces. When the unit 'organisation' is used in this report, it needs to be understood that the real life organisation may have other streams of activity, such as aged care, plus other staff (eg back office staff) who are not included in our analysis.

## The sample

In March 2017, Workforce Wizard collected data on more than 35,000 disability support workers and allied health professionals across Australia. Using the best available estimates of the total disability workforce, disability support workers covered by Workforce Wizard equate to around 39 per cent of sector (see Appendix Table 4). Considering the significant coverage of the sector that Workforce Wizard provides, aggregate results have been used where appropriate.

Within the disability support workers' sample, organisations that have entered comparable data across at least four out of the five quarters between December 2015 quarter and December 2016 quarter, or at least five out of the six quarters between December 2015 quarter and March 2017 quarter, have been isolated for longitudinal analysis. This longitudinal sample means the disability support worker results from each quarter are more truly comparable to each other, and can confirm trends.

In total, there were 123 organisations that qualified to be included this longitudinal analysis. These organisations covered 21,654 disability support workers in March 2017, so still

represent a large proportion of the sector nation-wide. Results from this longitudinal analysis are reported throughout this report.

There is no separate longitudinal analysis for the allied health workforce, as most participants of this sample are consistently engaged with Workforce Wizard and therefore constitute a longitudinal panel. Out of the 25 allied health organisations that participated in March 2017, 16 had entered data for at least four out of the last six quarters.

## What's in this report

The Australian Disability Workforce Report is the first public report to analyse Workforce Wizard data for the same organisations across a significant time period (six quarters) to reveal NDIS-related trends in the disability workforce. Disability's key workforce metrics are documented and discussed in this and every edition.

The Report contains the following sections:

1. Key findings on the disability support workforce and the allied health workforce, including within each:
  - types of employment
  - organisation growth
  - turnover rates
  - working hours; and
  - age and gender distribution.
2. Disability support workforce trends by state and territory
3. A comparison of the disability sector and aged care workforces
4. Special topic: Recruitment trends and recruitment difficulty
5. An appendix describing our methodology.

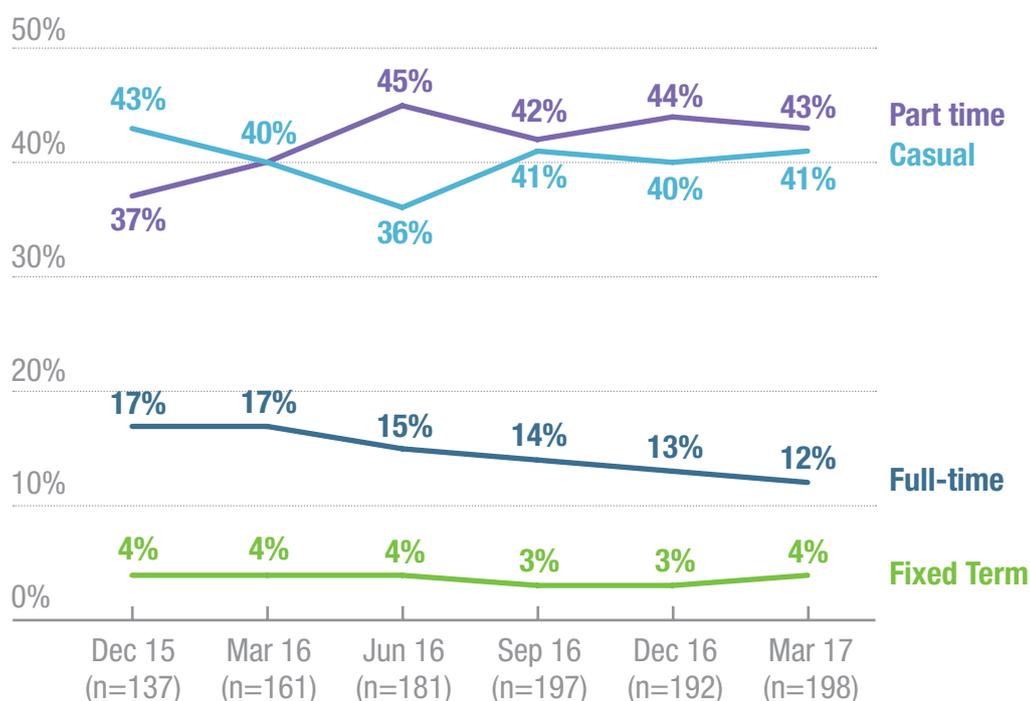
# Disability support workers: key findings

## Type of employment

The most common form of employment for disability support workers in the March 2017 quarter was part-time permanent employment (43 per cent of all workers), closely followed by casual employment (41 per cent). **Full-time permanent staff made up only 12 per cent of the disability support workforce.**

Fixed-term (contract) employees were not a significant part of the disability support workforce at only 4 per cent. Aggregate part-time permanent employment as a proportion of the total workforce has increased since the beginning of Workforce Wizard in December 2015. However, the December 2015 sample was decidedly smaller at around 26,000 workers and this trend could be attributed to sample error.

**Figure 1:** Employment type within organisations as percentage of workers

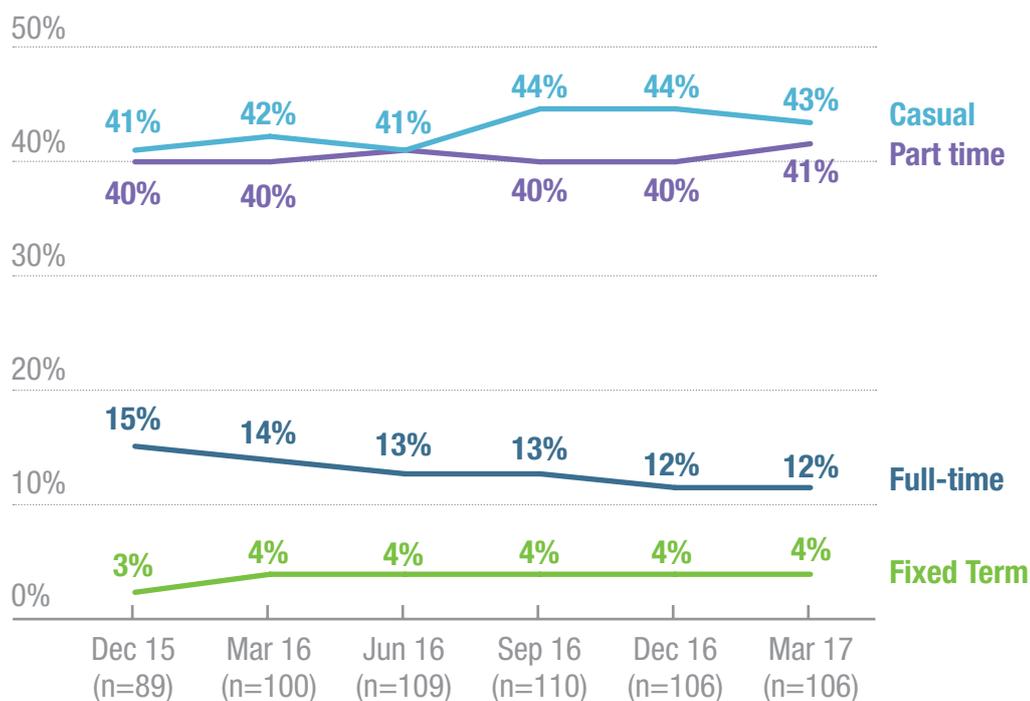


**Notes:** *n* is the number of organisations in the sample.

The employment type breakdown in the longitudinal sample (overleaf) tells a slightly different story to the whole sample. Figure 2 below shows that when we look at the **same** organisations over time, the proportion of casuals in the workforce has increased slightly while the share of full-time employment has decreased. In the March 2017 quarter,

casual employment had become the most common form of employment for the sample organisations. They made up 43 per cent of the workforce compared to 40 per cent at the beginning of the period in December 2015.

**Figure 2: Employment type within organisations, longitudinal sample**



**Notes:** *n* is the number of organisations in the sample.

The longitudinal sample is organisations that provided data least four out of the five quarters between the December 2015 and December 2016 quarters, or at least five out of the six quarters between December 2015 and March 2017.

## Results by organisational size

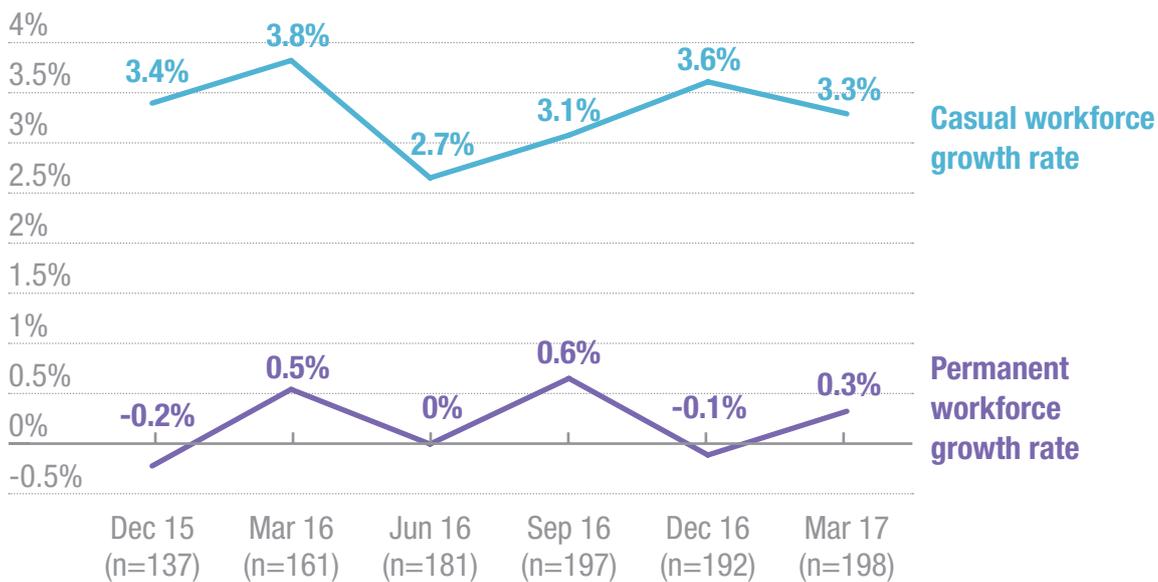
Simple linear regression analysis was performed to ascertain if there was any correlation between the degree of casualisation in the workforce and the casual turnover rate. The results showed no association exists. The same is true of the degree of permanent employment in the workforce and permanent turnover in the organisation. Similarly, no correlation was found between size of the disability support workforce or organisation and the rate of turnover. The reasons behind someone leaving an organisation are multifaceted – there can be both push and pull factors involved. The results from this dataset are that the experiences of high casual turnover in the disability support workforce are not isolated within large or small organisations, or within organisations that rely on a predominately casual workforce.

## Organisational growth

Through Workforce Wizard, we are able to track the rate at which organisations in the disability sector are increasing the number of staff in their workforces. Figure 3 shows

that organisations, on average, grew their disability support workforces by 3.6 per cent over the March 2017 quarter. (Note that 3.6 per cent is the sum of the permanent and the casual growth rates shown separately in Figure 3). These are net growth figures, taking into account people who left the organisation during the quarter, and people who have joined. Monitoring such growth rates is important given concerns about recruitment difficulties appearing during the NDIS rollout.

**Figure 3:** Average workforce growth over one quarter, permanent and casual



**Notes:** *n* is the number of organisations in the sample.

Permanent growth rates are for both part-time and full-time workers

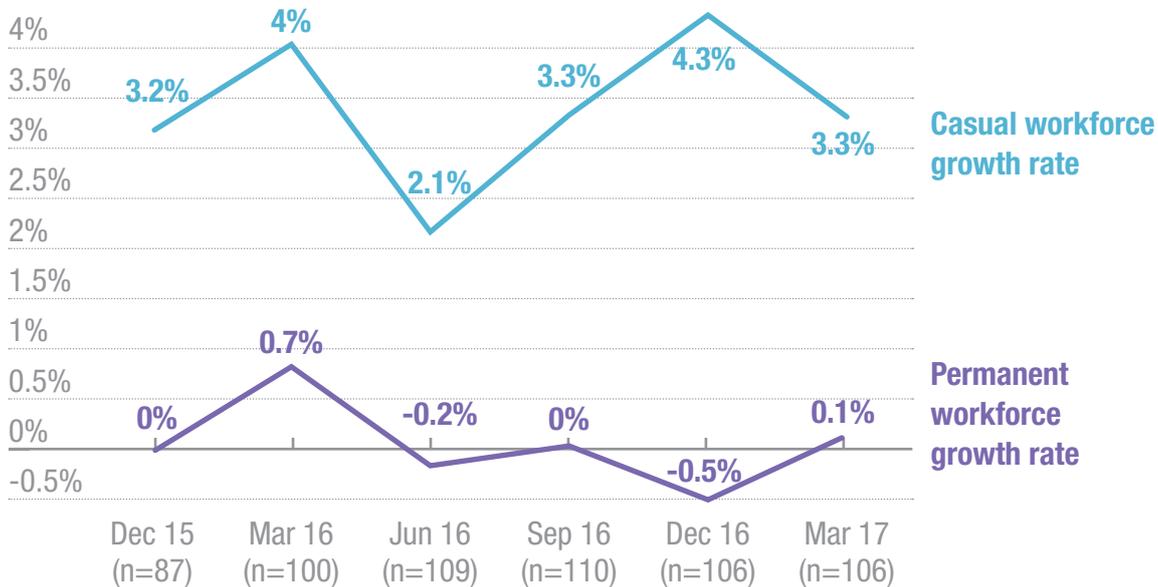
**Organisations, on average, grew their disability support workforces by 3.6% over the March 2017 quarter.**

**Organisational growth has been overwhelmingly driven by a growth in the casual workforce.**

As Figure 3 shows, organisational growth has been overwhelmingly driven by a growth in the casual workforce. Organisations appear to be ‘treading water’ with their permanent workforce, recruiting to replace people who have left but not significantly increasing overall numbers.

Organisational growth among the organisations in the longitudinal sample reflects the same patterns as the whole sample, confirming this trend. See Figure 4.

**Figure 4: Average organisational workforce growth over one quarter, longitudinal sample**



**Notes:** *n* is the number of organisations in the sample.

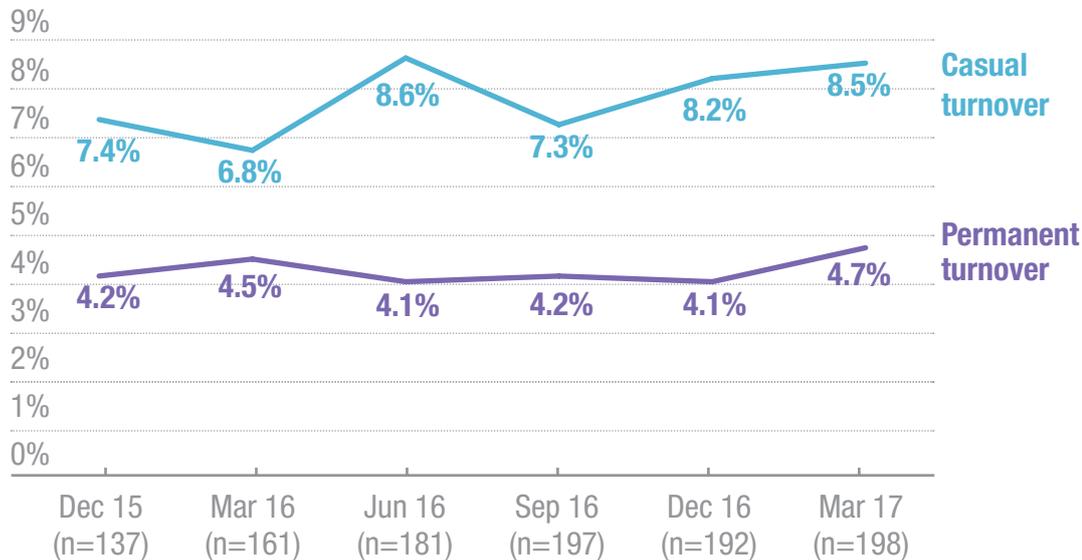
The longitudinal sample is organisations that provided data least four out of the five quarters between the December 2015 and December 2016 quarters, or at least five out of the six quarters between December 2015 and March 2017.

## Workforce turnover

Workforce turnover is a key metric Workforce Wizard provides. It is the rate at which staff have left the organisation compared with the number of staff at the organisation. While reasonable levels of turnover can be healthy for an organisation, high workforce turnover could reflect a disengaged workforce or pull factors from organisations offering better quality jobs. High turnover increases costs for the organisation and can disrupt the continuity of care for people with disability.

The average organisational permanent turnover rate has been relatively stable over time, sitting between 4.2 per cent and 4.7 per cent (see Figure 5). Conversely, the average organisational casual turnover rate has been somewhat more variable since December 2015 and in the March 2017 quarter sits at 8.5 per cent, nearly twice the permanent rate. Casual turnover has been over 8 per cent since June 2016, with the exception of September 2016, when it dipped to 7.3 per cent.

**Figure 5: Average organisational turnover rate, permanent and casual**



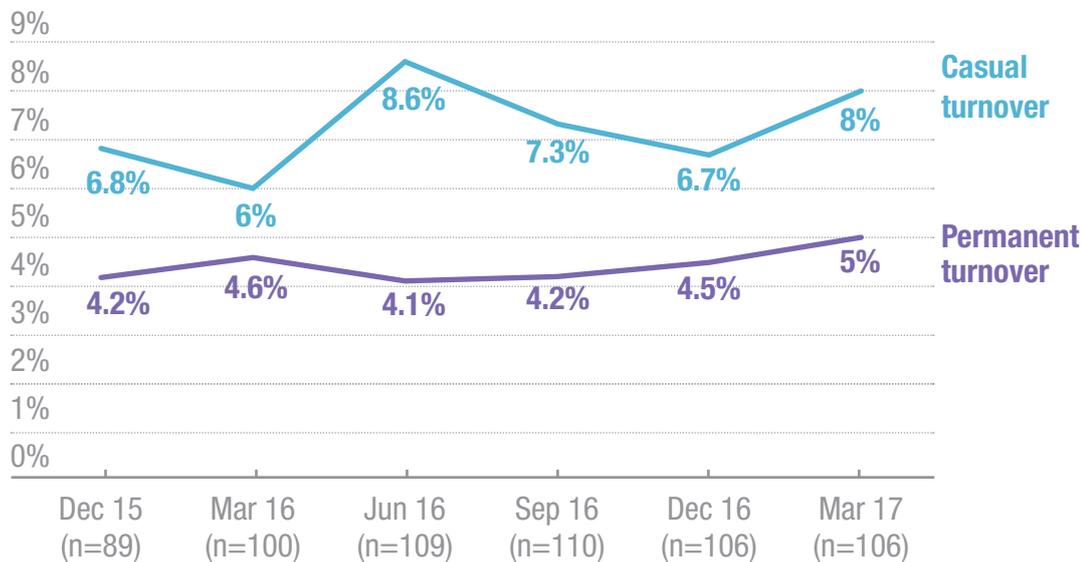
**Notes:** *n* is the number of organisations in the sample.

**Despite the benefits this flexibility gives the organisation, the data from Workforce Wizard shows that it comes at the price of higher turnover.**

There is concern that as the sector transitions to the NDIS, more organisations will take on casual direct support workers to remain flexible in light of uncertain demand and funding. Despite the benefits this flexibility gives the organisation, the data from Workforce Wizard shows that it comes at the price of higher turnover and its associated detriments.

Meanwhile, the turnover rate among the organisations in the longitudinal sample (see Figure 6) tells mainly the same story as the whole sample. The permanent turnover rate has been stable, hovering between 4 per cent and 5 per cent. The casual turnover rate also shows a stable pattern, with the exception of the December 2016 quarter, where the longitudinal sample experienced a small downturn not reflected by the whole sample.

**Figure 6: Average organisational turnover rates, longitudinal sample**



**Notes:** *n* is the number of organisations in the sample.

The longitudinal sample is organisations that provided data least four out of the five quarters between the December 2015 and December 2016 quarters, or at least five out of the six quarters between December 2015 and March 2017.

## Distribution of turnover rates

Not only is the permanent turnover rate nearly half that of the casual rate, but casual turnover rates are far less predictable than those for permanent workers. This is indicated by a higher standard deviation of the casual turnover rate. The standard deviation measures the level of variation among the values of a set of data. The higher the standard deviation, the more spread out the values are. In March 2017 quarter, the standard deviation of the casual turnover rate was 10.4 per cent, compared with 8.4 percent for permanent turnover rate.

Scatterplot graphs (not shown here) indicate organisations have similar and relatively low levels of turnover for their permanent staff, but very different and more varied turnover experiences with their casual staff.

## Working hours

How much of their working week a worker spends within the one organisation is another key workforce metric in a labour market of potential scarcity. As demand for support and services expands, many disability organisations are seeking to employ their staff for more hours – which can be cheaper and, in a tight labour market, more convenient than taking on new workers.

In the March 2017 quarter organisations employed their disability support workers for an average of nearly 22 hours per week for each direct support worker, with a headcount to FTE ratio of 1.97 staff per FTE. This can be viewed as saying, on average, an organisation

**Organisations employed their disability support workers for an average of nearly 22 hours per week for each direct support worker, with a headcount to FTE ratio of 1.97 staff per FTE.**

needed to employ nearly 2 people to fill one full-time position. (There is a converse relationship between the average number of hours worked per week and the number of staff it takes to fill a full-time position). In the last full working week in December 2016 hours were naturally lower than other quarters because of the holiday season, meaning fewer direct support hours being worked.

**Figure 7:** Average hours of work per week per worker and average organisational headcount to FTE ratio

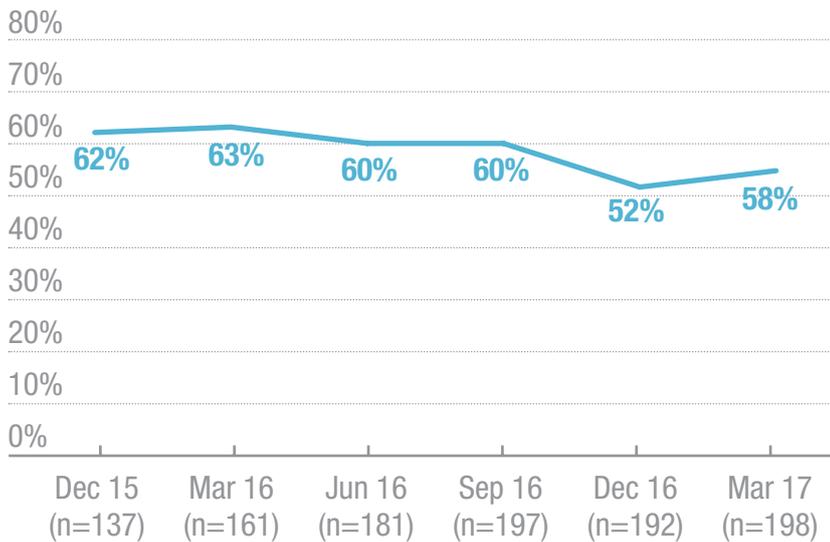


**Note:** *n* is the number of organisations in the sample.

For the average hours of work per week and the average organisational headcount to FTE ratio, the trend is the same for the longitudinal sample and the whole sample.

A similar metric is the disability labour force utilisation rate, which is a measure of the actual hours worked by all those currently employed as a proportion of the potential hours this group could work if they were all employed full-time. The utilisation rate for disability support workers has hovered around 60 per cent, with the exception of December 2016 quarter again, which dropped to 52 per cent, most likely due to seasonal factors.

**Figure 8: Average disability labour force utilisation rate**



**Note:** *n* is the number of organisations in the sample.

## Age and gender distribution

The disability support workforce has a high proportion of female workers. Women make up 70 per cent, on average, of the organisational workforce compared with 30 per cent being men. This figure has been very stable over time. Variations are only between one and two percentage point.

As seen in Figure 9, the average organisation has one-fifth (21 per cent) of its workforce aged 55 years and older. This is a little higher than the Australian all-industry employed workforce, where 19 per cent of people were in this age group. Similarly, the workforce aged between 45 and 54 years is over-represented in the disability sector. Nearly a quarter (24 per cent) of the disability workforce is between 45 and 54 years, compared with around 21 per cent for the Australian all-industry employed workforce<sup>1</sup>. This age distribution has remained stable since December 2015.

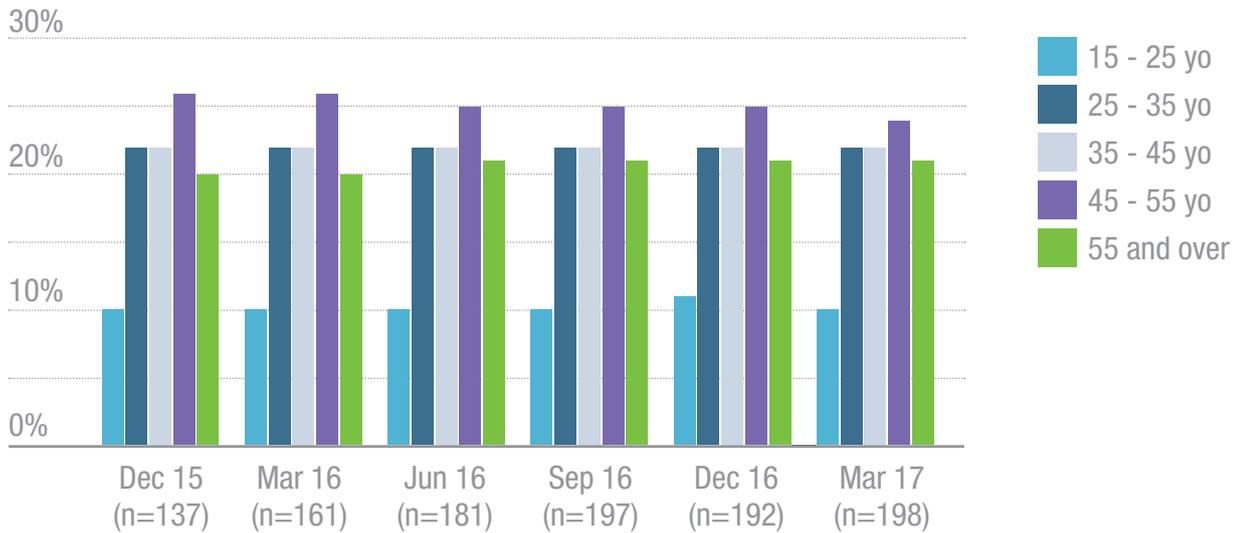
Seeing as 70 per cent of an organisation's workforce is female, and that the average retirement age for females in Australia is 60.4 years<sup>2</sup>, the disability support sector is facing an ageing workforce at the same time as growing demand for workers.

**The disability support sector is facing an ageing workforce at the same time as growing demand for workers.**

<sup>1</sup> Australian Bureau of Statistics, Labour Force, Australia, Detailed, Quarterly, Feb 2017, Cat no. 6291.0.55.003 (Table 26b).

<sup>2</sup> Australian Bureau of Statistics, Retirement and Retirement Intentions, Australia, July 2014 to June 2015, Cat. No. 6238.0, average age at retirement for persons who have retired in the previous five years.

**Figure 9: Average organisational distribution of the workforce by age**



**Note:** *n* is the number of organisations in the sample.

Workers aged between 25 and 45 years old were collected as a single age group in Workforce Wizard. Since it is a bigger age group than the others, it is presented as a bigger bar in the graph with its value divided by two. For example, in the March 2017 quarter, the percentage of workers aged between 25 and 45 years old was 44 per cent. In this graph, it is presented as two bars of 22 per cent.

# Allied health workers: key findings

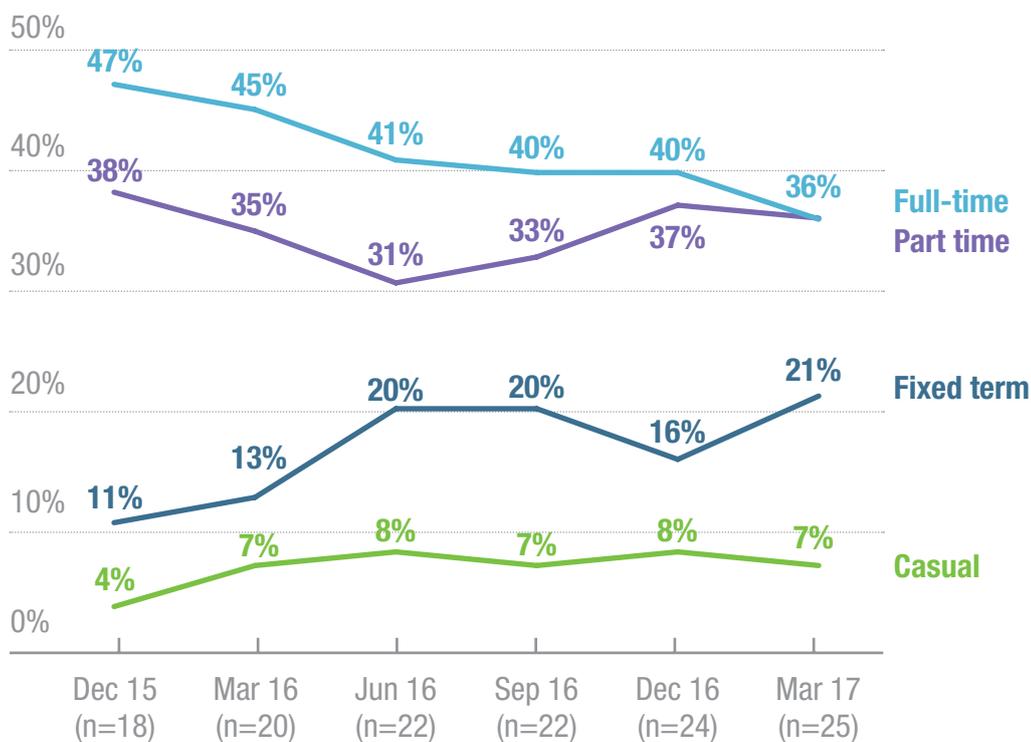
## Types of employment

Allied health professionals in the disability sector were most likely to be employed as full-time or part-time permanent workers (both 36 per cent in March 2017). Casual employment was considerably less common among allied health professionals than disability support workers (just 7 per cent compared with 41 per cent for support workers).

In fact, fixed term engagements are used more frequently than casual employment in employing allied health professionals and this form of employment appears to be growing. Users suggest that it is linked to the many professionals who take maternity leave and are replaced by people on short-term contracts (there is a high proportion of allied health professionals who are female and of child-bearing age, see below).

However, this doesn't explain the growth in fixed term contracts which users suggest is related to providers allaying the increased uncertainty in demand for their services by offering short-term employment contracts, especially to more highly paid staff.

**Figure 10:** Employment type within organisations as a percentage of workers



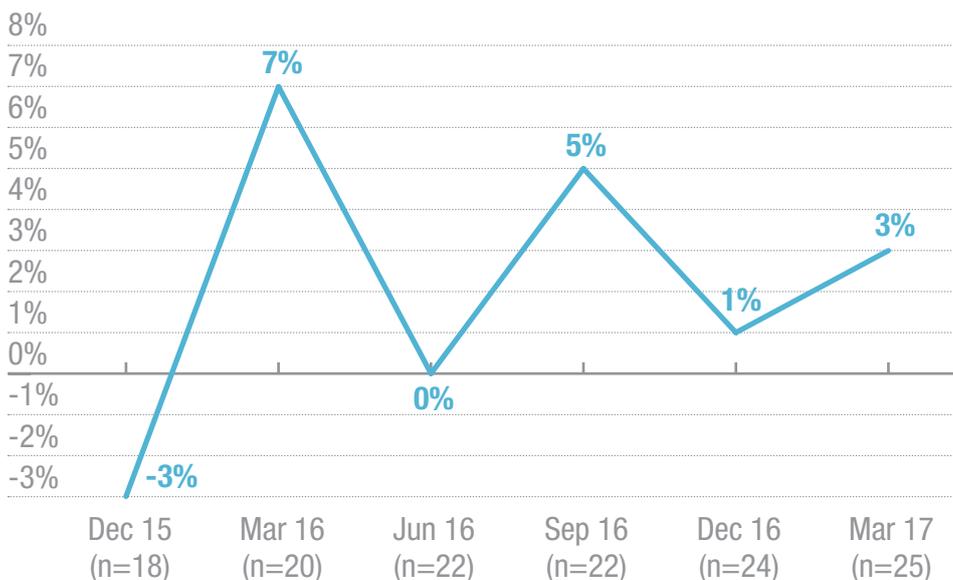
**Note:** n is the number of organisations in the sample.

**Fixed term engagements are used more frequently than casual employment in employing allied health professionals, and this form of employment appears to be growing.**

## Organisational growth

There is no consistent trend in the growth of the allied health workforce across organisations, which is most likely due to the complex labour market patterns for this group. Although physiotherapists, speech pathologists and occupational therapists are not currently designated as 'skill shortage professions' in Australia generally, users report shortages in many rural and remote areas. These shortages restrict organisations responding to demand growth in a timely manner and could help explain the faster growth in Figure 11 below in the first quarter of the year, when new graduates hit the market.

**Figure 11:** Average organisational workforce growth over one quarter



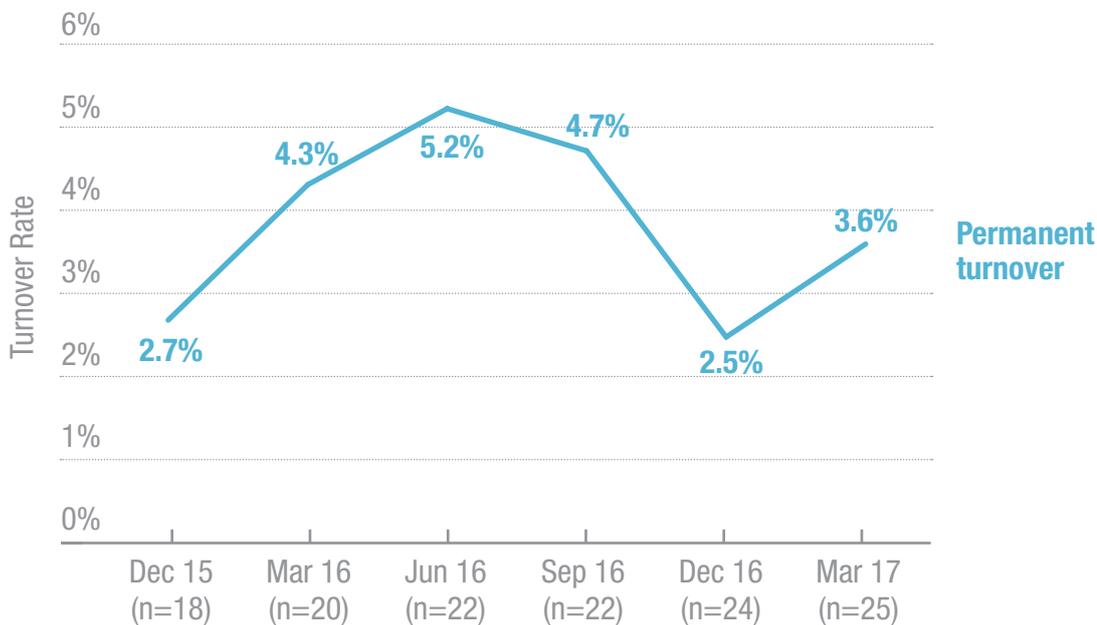
**Note:** *n* is the number of organisations in the sample.

## Workforce turnover

Turnover rates for the permanent allied health professionals were variable over the year, taking on an inverted 'U' shape in 2016, which peaked in June 2016 at 5.2 per cent. In a clear seasonal pattern, December turnover rates were low at 2.7 per cent in December 2015 and 2.5 per cent in December 2016. Turnover rates increased afterwards, at 4.3 per cent in March 2016 and 3.6 per cent in March 2017.

Within the allied health sample, only half of the organisations employed any casual allied health professionals, and for those that did, the number of casual allied health workers was predictably small. Turnover for this workforce will not be reported as the sample is too small.

**Figure 12:** Average organisational turnover for permanent allied health professionals



**Note:** *n* is the number of organisations in the sample.

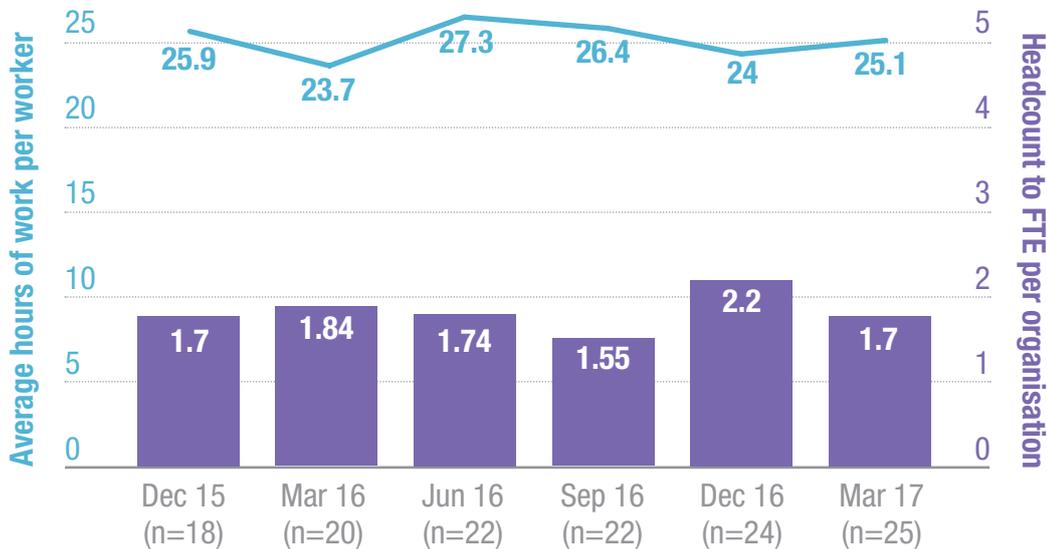
## Working hours

Organisations call on more hours of their allied health professionals potential working week than they do of their direct support workers. In other words, allied health professionals work longer hours on average. Within the average organisation, an allied health professional worked just over 25 hours per week in March 2017 compared to just under 22 hours for direct support workers. The hours of work per worker shows seasonal patterns and fell to 24 hours per week in December 2016.

The headcount to FTE ratio for allied health professionals was relatively stable since December 2015 at around 1.7 persons required to fill one full-time equivalent (FTE) position.

**Within the average organisation, an allied health professional worked just over 25 hours per week.**

**Figure 13:** Average weekly hours of work per worker and average organisational headcount to FTE ratio



**Note:** n is the number of organisations in the sample.

## Age and gender distribution

The allied health workforce is a much younger workforce than the disability support worker one. For the average organisation in March 2017, 64 per cent of their allied health workforce was aged 25 to 45 years old in comparison to 44 per cent for disability support workers. Only 15 per cent was aged 55 years and older compared with 21 per cent for disability support workers.

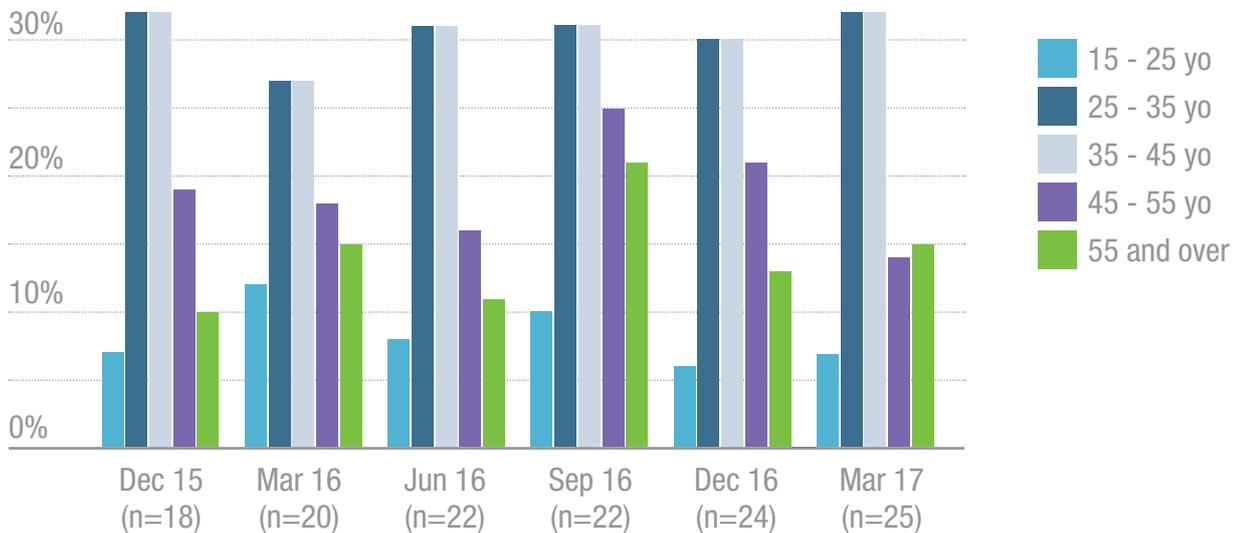
The allied health workforce is more female dominated than the disability support workforce, with the average organisation employing 89 per cent female staff and 11 per cent male staff. This gender distribution has remained stable since December 2015.

**The allied health workforce is a much younger workforce than the disability support workforce.**

**The average organisation employs 89% female staff and 11% male staff.**

Female 89%  Male 11% 

**Figure 14:** Average organisational distribution of the workforce by age



**Note:** *n* is the number of organisations in the sample.

Workers aged between 25 and 45 years old were collected as a single age group in Workforce Wizard. Since it is a bigger age group than the others, it is presented as a bigger bar in the graph with its value divided by two. For example, in the March 17 quarter, the percentage of workers aged between 25 and 45 years old was 64 per cent. In this graph, it is presented as two lots of 32 per cent.

## States and territories

The distribution of organisations is presented in Appendix Table 4. While some states and territories had a smaller number of organisations responding, those organisations covered a significant number of the disability support workforce in that state or territory, based on the best estimates available.

Organisations operating in the Northern Territory had a higher proportion of their workforce employed full-time and conversely, a lower percentage employed part-time. Although still a majority female profession, organisations in the NT had a higher proportion of men on staff than in other states or territories, and a higher proportion of workers under 45 years old.

Organisations in NSW have been experiencing a persistent pattern of lower casual turnover rates than other states, but higher turnover rates among their permanent staff over the past few quarters. This could be due to casualisation occurring in the sector, as the proportion of casuals making up the workforce has increased steadily in NSW over this time.

Queensland had a substantially higher casual turnover rate in the December 2016 quarter, while other quarters were on par with the national average. Investigating the data further, this was due not to one single organisation's result but systematically higher casual turnover rates over a number of Queensland organisations.

Organisations in Victoria are consistently more successful than other states in retaining

their permanent staff, although casual turnover rates remain on par with other states and territories. As with NSW, Victoria has also steadily increased the proportion of casuals in their workforces and simultaneously decreasing the proportion of part-time workers.

Like organisations in the Northern Territory, Western Australia also had a larger proportion of disability support workers under 45 years of age. As for turnover, organisations in Western Australia were consistently more likely, on average, to have a higher turnover rate for their casual disability support workers.

South Australia has a higher reliance on casual disability support workers than any other state or territory, with the proportion of casuals in the workforce having grown over the past few quarters.

Average turnover rates for this State have varied considerably each quarter, with casual turnover rates most recently being considerably below the national average.

Organisations in Tasmania have a lower proportion of full-time workers in their workforce compared with results across the nation, and a higher dependency on part-time workers. The proportion of casuals however is on par with the national average, as are the turnover rates for casual and permanent staff.

Note that results for the Australian Capital Territory are not presented because of the low number of users.

# Comparing the disability sector and aged care workforces

The disability and aged care workforces share many characteristics, including high female participation, short working hours and some aspects of the nature of the work itself – interactive care work, often involving personal and one-to-one support with significant emotional content.

However, by comparing the recently published 2016 National Aged Care Workforce Census and Survey<sup>3</sup> with NDS Workforce Wizard results we can see some interesting differences between the two workforces.

For example:

- In the March 2017 quarter, **47 per cent of disability support workers were employed as a casual or on contract**, compared to 10 per cent in aged care residential, and 14 per cent in aged community care.
- some 30 per cent of disability support workers are men, compared to 10 to 11 per cent of direct care workers in aged care (for residential and community care respectively)
- 11 per cent of disability support workers are aged 16 to 24 years, compared to less than 3 per cent for aged community care and just over 6 per cent in aged care residential.
- Only around 5 per cent of allied health staff (both residential and community care) in aged care were employed as a casual or on contract compared to some 25 per cent of those in disability.

Overall, the disability workforce is more age and gender-balanced and much more likely to be casually engaged than the aged care workforce.

Are there two distinct workforces or can we increasingly think of a shared social care workforce? The Aged Care Census suggests that the workforces are quite separate.

- Around 9 per cent of workers in residential aged care have second jobs, of which very few (0.2 per cent) are in disability. The other 8.8 per cent is mainly in aged care, with some working in unrelated industries.
- In community aged care, 16 per cent of workers have two jobs, and 2 out of the 16 per cent of these are in disability. Again, the biggest share (7 per cent) have a second job in aged care, suggesting to date little merging of the two workforces has taken place.

<sup>3</sup> Mavromaras, K et al (2016) The Aged Care Workforce, 2016, Australian Government 2017.

# Spotlight topic: Recruitment trends and difficulties

## Recruitment difficulty - disability support workers

NDS now adds one special or 'spotlight' topic to Workforce Wizard each quarter. These topics will be repeated on a rolling cycle over two years. The aim is to collect data on issues that are critical to the sector but are tracked more appropriately over a longer period than quarterly.

Recruitment difficulty was the spotlight topic in the March 2017 quarter. It comprised three questions and 95 per cent of users who entered data on their disability support workers also responded to these supplementary questions.

Of the 192 valid responses, more than three-quarters of organisations indicated that they advertised to fill at least one disability support worker position in the March 2017 quarter.

Organisations in NSW were most active in their recruitment, with 88 per cent of organisation advertising to fill a position. This was followed by WA (82 per cent). Victoria and Queensland were least active, with a below-average proportion of organisations advertising to fill a position (68 per cent and 70 per cent respectively).

**Table 1:** Organisations which advertised to fill a direct support worker role, March 2017 quarter, by state

State	Yes (%)	No (%)	Total (%)	n
New South Wales	88	12	100	33
Western Australia	82	18	100	33
Multi-state	75	25	100	12
South Australia	75	25	100	20
Queensland	70	30	100	33
Victoria	68	32	100	44
Other states and territories	N/A	N/A	N/A	17
<b>Total</b>	<b>76</b>	<b>24</b>	<b>100</b>	<b>192</b>

**Note:** n is the number of organisations in the sample.

Nearly two-thirds (65 per cent) of organisations which advertised were able to fill all disability support positions advertised in the March 2017 quarter. More organisations in

WA experienced difficulty in filling their vacancies on disability support workers than other states. Only 56 per cent of Western Australian organisations were able to fill all positions. Organisations in Queensland, by contrast, had the least difficulty, with four-fifths of organisations filling all disability support positions advertised.

**Table 2:** Organisations with advertised positions filled and unfilled, March 2017 quarter, by state (%)

State	Filled (%)	Unfilled (%)	Total (%)	n
Western Australia	56	44	100	25
Victoria	62	38	100	29
South Australia	64	36	100	14
New South Wales	67	33	100	27
Queensland	79	21	100	19
Other states and territories	N/A	N/A	N/A	19
<b>Total</b>	<b>65</b>	<b>35</b>	<b>100</b>	<b>133</b>

**Note:** *n* is the number of organisations in the sample. A small proportion (6 per cent) of users did not answer whether or not their advertised positions were filled.

Most organisations which had unfilled positions provided the estimated or actual number of unfilled positions. In total, there were 155 advertised disability support positions unfilled, compared with 1,768 number of permanent and casual positions reported filled in March 2017 quarter. It should be noted that although around one-third of providers reported having at least one position unfilled at the end of the recruitment round, there were approximately eleven times as many positions filled as unfilled during the quarter.

**There were approximately eleven times as many positions filled as unfilled during the quarter.**

## Reason for unfilled vacancies

The most common reason given for difficulty filling positions was the lack of suitable or qualified candidates (29 per cent). Candidates being unable or unwilling to meet specific job requirements, poor employment conditions and/or job prospects, geographical factors, organisational factors, the tight labour market and seasonal factors were given as reasons; more detail is provided below.

A common difficulty faced by providers appears to be the **increasing specificity of job requirements for disability support positions**, a result of providers tailoring jobs to clients under the NDIS.

Around 22 per cent of responses mentioned that the advertised role required one or more of the following:

- specific job skills (ranging from experience in community access support to gardening, horticulture and cleaning)
- demographic characteristics (e.g. young male, Indigenous or another cultural background)
- personality attributes (as assessed in a psychometric test, or suitability to care for clients with challenging behaviours).

Some mentioned that the requirements for flexible working hours or shift work were other factors limiting the candidate pool.

A significant minority of responses (13 per cent) mentioned poor employment conditions, especially the lack of permanent full-time roles and low rates of pay as possible reasons for the vacancies to be unfilled.

Geographic location also poses a challenge for recruitment. Thirteen per cent mentioned that rural or remote areas or the need to travel across long-distance locations as a factor for the vacancies to be unfilled.

Other factors mentioned in the responses include organisational factors (e.g. a lengthy recruitment process, a policy on recruiting internal applicants only or a change in policy directions during the recruitment process) and a limited labour supply to meet the increasing vacancies opening up under the NDIS.

**Table 3:** Reasons positions were unfilled at the end of the recruitment round

Reason given	%	n
Lack of suitable/qualified candidates	29	20
Candidates unable/unwilling to meet job requirements	22	15
Geographical factors	13	9
Poor employment conditions and/or job prospects	13	9
Organisational factors	9	6
Limited labour supply for the expanding vacancies	7	5
Seasonal factors	3	2
<b>Total (including other)</b>	<b>100</b>	<b>69</b>

**Notes:**  $n = 69$ . This was an open-ended question so a respondent could mention more than one factor.

## Recruitment difficulty - allied health professionals

Twenty one out of 25 organisations which entered data on allied health professionals responded to the supplementary questions on recruitment difficulty (84 per cent). Of these, thirteen respondents indicated that they advertised to fill an allied health professional position in March 2017 quarter (62 per cent).

Seven of the eleven providing a valid answer were able to fill all positions, while four were not. An estimated 10 allied health professional positions unfilled in March 2017 quarter while 64 permanent and casual positions were filled.

Reasons given for recruitment difficulty of allied health professionals were similar to the problems faced by organisations recruiting disability support workers. They included the lack of suitable/qualified candidates, poor pay, rural and remote locations and internal organisational factors. One respondent mentioned that the wages offered for the advertised position was above award rate, but was still unable to meet the preferred candidate's expectations. The inability to use NDIS funding for the hours of supervision was also mentioned as a constraint on the recruitment process itself.

Unlike with disability support workers, increasing specificity in job requirements was not mentioned as a problem for organisations employing allied health professionals.

Although the sample is small, these results suggest slightly greater difficulty in allied health professional compared to disability support worker recruitment. Indeed, the NDS Market Survey 2017 found that most difficulty was experienced in the recruitment of allied health employees. In this survey, twenty-three per cent of organisations employing speech

therapists and 22 per cent of organisations employing occupational therapists found people with these skills 'extremely difficult' to recruit.

## Trends in advertised roles on carecareers

Another perspective on recruitment is afforded by looking at trends in advertised jobs. This section explores recruitment activity data from carecareers, NDS's job board website where between 4,000 and 5,000 aged and disability sector job ads are posted by employers each quarter.

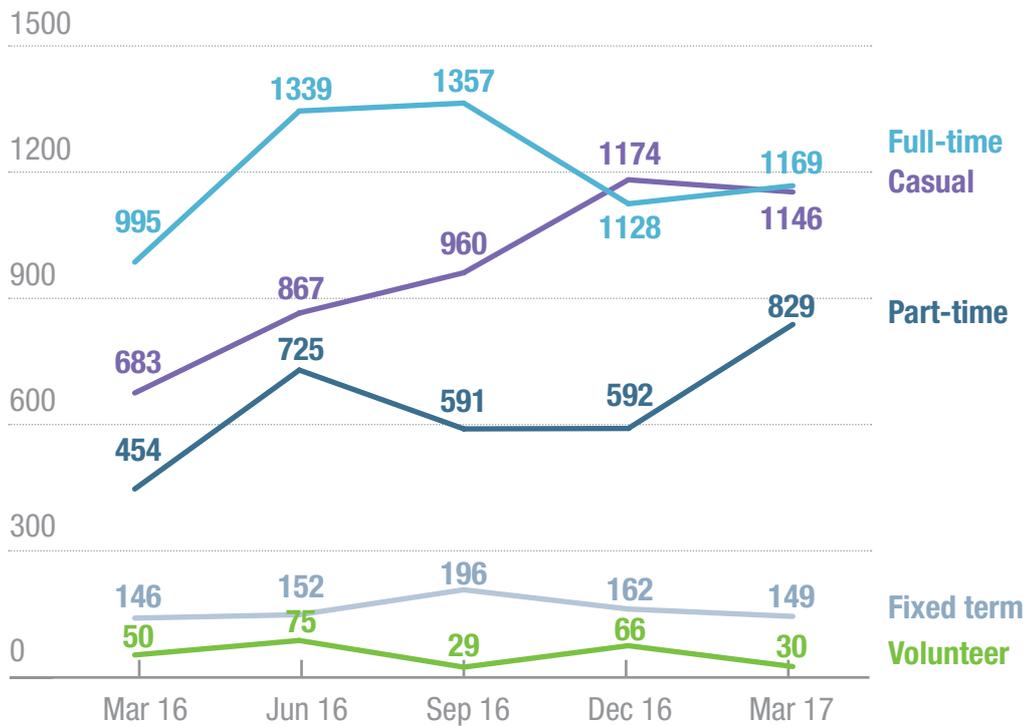
Advertised job trends are 'leading' indicators of workforce changes, pointing to changes that may be harbingers of workforce wide trends. They can complement Workforce Wizard data which covers the current, existing workforce.

### The number of advertised job vacancies

Over the past five quarters the number of job vacancies posted by NDIS-registered organisations to the carecareers job board shows a clear growth trend in part-time and particularly casual roles compared with uneven growth in full-time roles.

The usual seasonal pattern is a fall in the number of vacancies in the second quarter of the year, but in 2016-17 casual vacancies rose significantly in the second December quarter as shown in Figure 15 below.

**The carecareers job board shows a clear growth trend in part-time and particularly casual roles compared with uneven growth in full-time roles.**



**Figure 15:** No. of job ads on carecareers – NDIS registered organisations

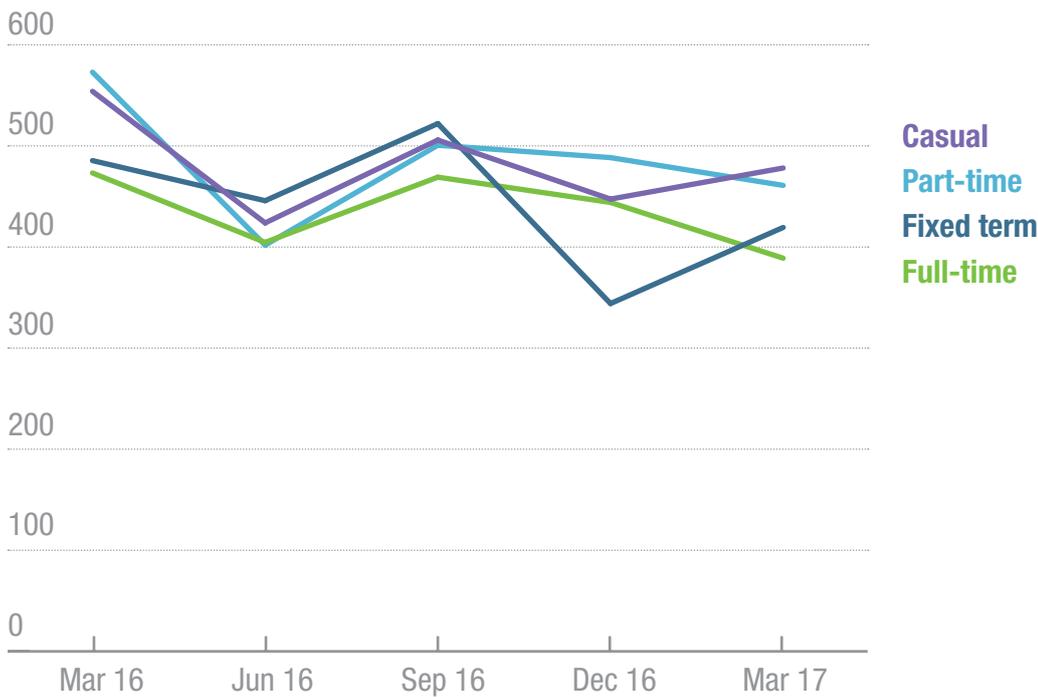
The sample is all job roles advertised, of which support worker roles comprise approximately two-thirds.

The above data is national and based on job vacancies offered by organisations registered with the NDIS to provide disability supports and services. Note that whether these organisations are actually providing NDIS supports is not known.

## Interest in roles in the disability sector

The number of 'views' per job ad is one indicator of the extent of interest in a job as it reflects a job-seeker clicking to see more details about an advertised position. As shown below, there has been a slight decline in the number of 'views' per job over the last five quarters.

Given the rapid growth in the sector, any fall in the number of views per ad might be an early indicator of demand for roles potentially exceeding supply. There appears to be gradual decline in average 'views' across job types over the past five quarters (see Figure 16).



**Figure 16:** No. of views per ads on carecareers – NDIS registered organisations

*The sample is all job roles advertised, of which support worker roles comprise approximately two-thirds. A 'view' occurs when a jobseeker clicks on the 'View details' button that appears in her/his search results.*

# Conclusion

This Report publishes the results from six quarters of Workforce Wizard data. Both the aggregate results for over 35,000 front line disability workers, and the longitudinal results from organisations that have consistently entered their workforce data tell an important story about the disability workforce in a time of restructuring and change.

Paradoxically, perhaps the most remarkable feature is the stability of the results, quarter after quarter. Although the sector's critics and its champions have both warned of rampant casualisation under the NDIS, the trend towards more casual employment and away from permanent employment is visible but slight.

In part this is because disability was already a highly casualised industry. Casual workers made up 40 per cent of the sample at the beginning of the period in December 2015. By the March 2017 quarter, this had increased to 43 per cent, making casual work the most common form of employment. In aged community care, a recent workforce census tells us that casual and contract employment forms just 14 per cent of the total.

The turnover data revealed through Workforce Wizard highlights the greater recruitment effort such high rates of casualisation require. The casual turnover rate is nearly double that of the permanent one, and casual turnover rates are also far more variable, making workforce planning challenging. NDS's sector-specific job board, carecareers, reflects the other side of this situation, showing a strong growth trend in part-time and particularly casual job ads compared with more muted and uneven growth in ads for full-time roles.

It is clear that the sample disability organisations are growing quickly, another contrast with aged care. In the March 2017 quarter, average net growth was nearly four per cent, and has been about three per cent quarter on quarter since December 2015. Although around one-third of providers reported having at least one position unfilled at the end of the recruitment round, there were approximately eleven times as many positions filled as unfilled during the quarter.

While rural and remote, and allied health roles are hard to fill, and many organisations had vacancies, the data suggests that these moderate skill shortages reflect a healthy sector growing strongly.

Part of the recruitment challenge, users report, results from attempts to respond to consumer choice and control by tailoring job requirements to NDIS participant needs and preferences. However this positive is offset by unfavourable employment conditions (including the casual employment described above) which are a deterrent to some applicants.

It is interesting to see that disability is a more age and gender-balanced sector than other areas of social care. There has been a small uplift in the number of 15 to 24 year olds since 2015, and the percentage of people over the age of 55 is only two percentage points above the Australian all-industry employed workforce average of 19 per cent in this age group.

Allied health remains a far more female-dominated work area than disability support. A steady 89 per cent of the allied health workforce has been female from December 2015 to

the present day. And while allied health professionals are a relatively highly paid group, their employment conditions have been deteriorating. Fixed term or contract employment has nearly doubled since December 2015, growing from 11 to 21 per cent in March 2017.

This first comprehensive analysis of Workforce Wizard data reveals many other tantalising features of industry trends under the NDIS. In future editions, NDS will report on these trends and other special interest topics that help all in the sector understand both the positives and the pain points as the NDIS moves to full rollout.

## Appendix

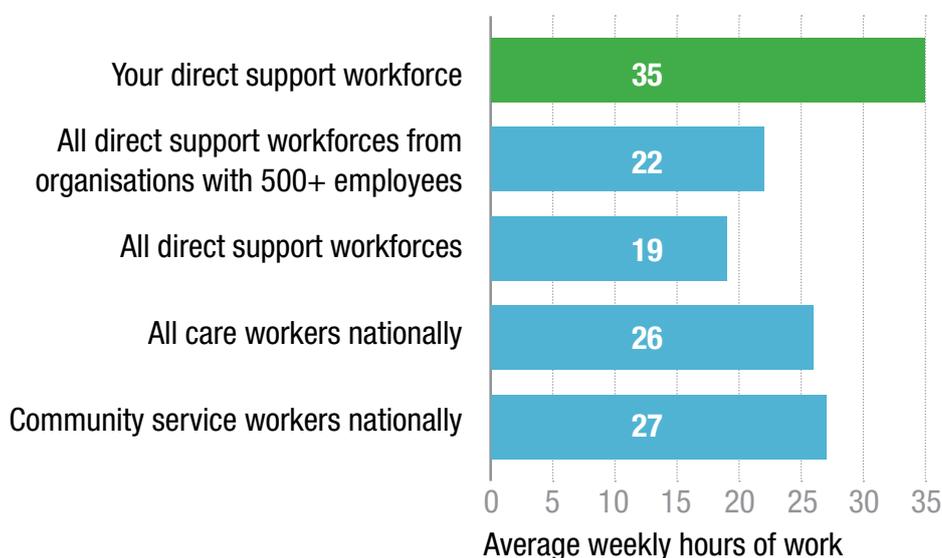
### Workforce Wizard methodology

A communication campaign was widely implemented when Workforce Wizard was first launched in October 2015. From this campaign, and continued efforts, there is a list of more than 500 users of Workforce Wizard who have varying engagement with the website. Each quarter, a series of five announcements and reminder emails are sent to these users notifying them of the data entry period or of new Workforce Wizard features. Targeted phone call reminders are also conducted, which are particularly successful at picking up the response rate.

The data entry period is open for two weeks, after which the Workforce Wizard team clean the data and verify any anomalies. When finalised, benchmark reports are made available to all participating organisations comparing their own results with similar organisations and community sector data (see Figure 17).

Organisations are able to enter data based on workforces of their own defining. For the purposes of Workforce Wizard, a 'workforce' is a collection of employees specified and defined by the user. A user can define a workforce by region, occupation, service type or any other preferred criteria. For the purposes of this report, if an organisation entered data for more than one workforce, those workforces were consolidated into one organisational result.

**Figure 19:** Example benchmark chart from Workforce Wizard



In March 2017, Workforce Wizard collected data on more than 34,000 disability support workers across Australia. Using the best available estimates of the total disability workforce, disability support workers covered by Workforce Wizard equate to around 39 per cent of sector (see Table 4). Considering the significant coverage of the sector that Workforce Wizard provides, aggregate results have been used where appropriate.

**Table 4:** *Distribution of organisations and disability support workers, by state and territory, as at March 2017*

	Number of orgs (disability support workers)	Total disability support workers	Total allied health workers	Best available disability support workforce estimates 2016 (projected) <sup>1</sup>	Percentage of headcount over workforce estimate %
VIC	46	6,080	23	21,626	28
NSW	34	7,097	86	27,316	26
QLD	33	3,961	42	15,745	25
WA	32	5,849	589	8,348	70
SA	20	3,946	93	8,002	49
TAS	8	1,220	16	3,146	39
NT	7	532	0	932	57
ACT	3	207	0	1,245	17
Multi-state	15	5,188	388		
<b>Total</b>	<b>198</b>	<b>34,080</b>	<b>1,237</b>	<b>86,366</b>	<b>39</b>

<sup>1</sup> Source: NDS and Sphere (2014) 'National disability-related workforce, methodology and modelling results', based on custom-ordered ABS 2006 and 2011 Census data of selected occupations and industries, following PWC (unpublished) 'Planning for a sustainable disability-related workforce'.

Workforce Wizard has significant coverage in Western Australia due to a concerted campaign in that state. NDS will make stronger efforts to target New South Wales, Victoria and Queensland in future quarters, as although there is a high number of respondents in these states, Workforce Wizard has a relatively low coverage given the size of the workforce in these states.

## carecareers usage and data

carecareers data is assembled from the thousands of daily transactions that take place around the online job board. A standard sequence of events is as follows:

- an employer posts a job advertisement (vacancy notice) on the job board
- in the course of the 30-day period that it remains live, people looking for work may discover a summary of the job ad in their search results
- if a summary interests a jobseeker, she/he can click on 'view details' to see the full job description
- if the full job description is sufficiently enticing, she/he can then press the 'apply' button to commence an application for the role.

At every stage of the process the carecareers system records the transaction, which allows us to build a detailed picture from this continuously updated source of data.

## How representative is carecareers data?

The carecareers job board carries an estimated 50 to 60 per cent of all jobs in the disability job market. NDS charges advertisers in order to cover the running costs, so the advertiser base consists of those organisations and employers which make a conscious choice to opt in. Advertising rates are however deliberately kept low in order to ensure that we attract as many disability sector job ads as possible. The estimated 50 - 60 per cent of ads carecareers covers within the overall disability job pool makes it highly representative of the market as a whole.

Employers advertise for staff as and when they need to. At any one point in time the mix of employers whose roles are being advertised on carecareers will be different, but the size of the market in terms of the numbers of job ads remains reasonably consistent, give or take seasonal factors. It should be noted that many job vacancy notices advertise more than one position; this is especially true of casual and part-time job ads.

Jobseekers do not have to pay to use the job board. Jobseekers rarely access the job board on a continuous basis. Typically they actively use the site, returning for multiple visits over a number of months when they are looking for a new role, and then reduce their use once they have found a suitable job. Again despite this continuous churn, the overall numbers of jobseekers actively using the site remain more or less constant, subject to seasonal variations.

The carecareers platform is periodically updated and the innovations introduced affect processes and hence results. In the data used for the Australian Disability Workforce Report we have factored out such changes and also deliberately excluded atypical events and organisations/employers which might otherwise skew the results.

