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# A Parent's Guide to the NDIS PLANNING MEETING

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Maximise Value | Minimise Stress | Helpful Hints

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## 1. Understand NDIS

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Educate yourself on the NDIS.  
Attend 3 information sessions  
so that you can answer:

- What is the NDIS?
- What is a Plan?
- What is a Planning Meeting?
- What are NDIS goals?
- What are Core, Capacity, and Capital Supports?
- What's covered; what's not?
- What is "Reasonable & Necessary"?
- What is Plan Management?
- What is Support Coordination?

## 2. Schedule the plan

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Schedule your NDIS Planning Meeting to allow at least 4 weeks of preparation. A proposed preparation timeline:

*Week 1:* Brainstorm your child's and family's requirements. Request therapeutic reports with future goals and funding recommendations from current providers.

*Week 2:* Frame goals and define resource requirements.

*Week 3:* Justify and quantify resources, and prepare documentation.

*Week 4:* Review, revise and validate.



## A 10 Step Guide to NDIS Success

The aim of the NDIS (*National Disability Insurance Scheme*) is to financially support individuals with disabilities to achieve their goals. The purpose of the planning meeting is to document these goals and outline the resources required to achieve them. The NDIA (*National Disability Insurance Agency*) then issues a Plan which summarises the goals and allocates funding for a 6 month, 1 year or 2 year period.

The parent's responsibility is to rigorously prepare for the 1.5 hour Planning Meeting in order to comprehensively and succinctly present the requirements of the child and thus secure the requisite funding.

In preparing for the meeting, the parent should first think broadly and deeply on the requirements of the child across all domains of life, including communication, emotional regulation, self care, sociability and recreation. Second, formulate a long term vision for the child and define near term and longer goals. Third, identify the resources required in the next 1-2 years to achieve these goals, collect cost estimates and phase the supports across a year.

For each high value item, justify the expenditure as "*Reasonable and Necessary*" as defined by the NDIS criteria and align the expense with the child's stated vision and goals. Finally, provide supporting documentation to demonstrate historic

### 3. Brainstorm

Sketch the optimal life for your child at ages 8, 15, 20 and 30.

Consider which skills your child requires to achieve an optimal future. Which skills does he/she need to build now? Which skills can be deferred?

Think deeply about which resources would unlock your child's capability. Bucket these according to time frame (near, medium and long term).

Think about what would make every day a little easier and a little happier. Jot down solutions to achieve this.

List what's not working for your child and family, and what's unsustainable or too hard. Outline solutions for these issues without the constraints of money, time and parental energy.

Finally, consider whether you can carry on at this current intensity for 20 years. What do you need to sustain yourself, build capability and restore your vitality?

### 4. Frame

Having deeply considered your child's situation and the impacts on your family, a few themes will have emerged. Synthesise these themes into 2-3 short term goals and 1-2 medium and/or long term goals.

Allocate your brainstorming ideas to these goals and assign supports to each.

This is the frame for your NDIS plan with goals and supports defined.

progress towards goals and a track record of delivering therapies and interventions.

#### *Be Reasonable*

The NDIS is a scheme intended to span generations. Its long term viability is in everyone's best interest, therefore be reasonable in your funding requests and demonstrate good stewardship of funds.

#### *Present your best documents*

The documents which you present are a snapshot of your child and introduce you to the NDIS planner. These documents build the planner's understanding of your child's requirements. They provide the planner with prepared answers to the extensive interview questions and streamline the planning meeting. Well constructed documents will also enable the planner to "cut and paste" justifications for funding and fast-track efforts to compile your application. This eliminates requests for additional information, avoids the inconvenience of receiving an incomplete plan, and delays.

#### *A Documents Checklist*

- **COVER PAGE:** Child and family photograph(s); Key Descriptors (Name, Birth Date, Diagnoses, NDIS Number)
- **BACKGROUND:** Diagnoses; Informal and Formal Support Networks; Family Description; School and Therapy Arrangements; Vision Statement; Goals
- **SUMMARY OF PROPOSED PLAN:** Core, Capacity Building and Capital components outlined
- **SUPPORT AREAS, STRATEGIES AND COSTS:** Chart of each support area and its associated strategies with weekly / annual hours and cost estimates
- **PROPOSED SUPPORTS PHASED:** Chart depicting the timing of each strategic support over a week and over a year
- **HISTORIC PROGRESS TOWARDS GOALS:** Chart deconstructing goals into elements and tracking progress over time
- **CURRENT SCHEDULES:** Chart highlighting daily activities, variance to a typical child, oversight requirements, pressure points and alignment to NDIS supports
- **SUPPORTING DOCUMENTATION:** A list of attached documentation (therapeutic reports, service quotes)

*Sample documents are available upon request.*

## 5. Justify & Quantify

Build the case to justify why the requested resources are “reasonable and necessary”.

Scope the cost of these requested resources and phase the supports over a week and a year.

## 6. Validate

Validate your materials with someone experienced with the NDIS planning process and incorporate the feedback. Expect to pay for this input.

## 7. Document

Assemble your documents into a single bound dossier. Hand deliver the dossier to the NDIS office 2-4 days prior to the planning meeting. Email documents as well.

## 8. Assemble a team

Take your child to the meeting, along with a carer, so that the planner can observe your child and verify the descriptions provided in the documentation. The carer and child can exit the meeting after 15 minutes.

Take your spouse to the meeting to demonstrate the commitment and unity of the family, as well as to provide a consistent narrative from multiple viewpoints.

Take an additional person to the meeting who is experienced with the NDIS. This person can provide moral support, offer prompts to support your case and share additional observations. This



### *A Strategy for the Meeting*

View the Planning Meeting as an *Investment Presentation*. You are your child’s representative to secure the funding necessary for him to launch his best life. You must be prepared and organised. All goals and requests for supports should be well articulated, documented and assembled in a single dossier. Hand-deliver the dossier to the NDIS office 2-4 days in advance of the meeting. The planner can then review your child’s case in advance and the meeting will be targeted on verifying the supports requested, rather than gathering background information. Planners rarely review documents emailed in advance.

At the planning meeting, answer the planner’s questions with descriptive anecdotes of your child and highlight the distinction between your child and a typical child of the same age. Your characterisation of life should represent days in the bottom half or bottom quartile in order to elucidate the capability of the child and represent the potential risks associated with the child. In discussions, detail the impact of your child on siblings and parents; identify constraints to attendance at social events, accessing the community, maintaining relationships, going on holidays, sleep and health.

At the conclusion of the meeting, the planner will ask you whether you prefer the plan to span 6 months, 1 year or 2 years. In this first instance, 1 year is usually preferable. You will also be asked whether you wish to “Self-manage”, “Plan-manage” or “NDIA-manage”. Research these options in advance and make a determination. In the first instance, whilst the learning curve is steep, “Plan-managed” may be preferable to minimise your administrative burden and maximise your provider options. At the same time, you are entitled to request, and receive funding for, “Support Coordination” to assist with identification of supports and plan implementation.

person should present as a “friend of the family” and not as “legal counsel”.

Assemble 100 points of identification for you and your spouse and take to the meeting.

Take an additional copy of your dossier to the meeting.

Acknowledge that the preparation and effort for this meeting is significant, but the potential return is high with far-reaching impacts for your child and family.

## 9. Present

At the NDIS meeting, present a complete picture of your child detailing aspirations, challenges and strategies.

## 10. Implement

You will likely receive your plan in the mail in ~ 1 month’s time.

The plan will contain a total funding value and some itemisation. It will not be clear what is funded and what is not. It will also not be clear how to implement the plan. See Next Steps for a guide.

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Finally, offer the planner any additional insights which were overlooked in the discussion; ask whether additional information or clarification is required, and when the plan will be available.

## After the Meeting

Following the planning meeting, you may feel a wave of relief and fatigue. The explicit accounting of your child’s disability is confronting and emotionally exhausting. Allow yourself time to recover and celebrate your effort in advocating for your child.

Your plan will likely arrive in the mail in one month’s time. Frankly, it is hard to figure out what the plan means and what you are supposed to do next. For this reason, 1 out of 3 NDIS plans are never activated and the monies are not accessed. To implement your plan, your next steps should be as follows:

### Next Steps ...

- **IDENTIFY FUNDING AMOUNTS:** Consult your NDIS plan to identify the total value of your plan which is labeled as “*Total Funded Supports*”; identify how much is allocated for plan administration (“*Plan Management*” + “*Support Coordination*”); identify how much is available for therapies (“*Improved Daily Living Funding*”), and identify how much funding is allocated for expensive pieces of equipment (“*Capital Supports*”). These are your headline numbers.
- **IMPLEMENTATION MEETING:** Request an *NDIS Plan Implementation Meeting* to have your plan explained to you in person by your planner. Arrange by calling the NDIS Contact Number on the last page of your NDIS Plan. This is a free, highly informative session.
- **INFORM PROVIDERS:** Inform your current providers that your child has individualised funding through the NDIS. Scan your NDIS plan and email to current providers and ask them how their services align with your NDIS funding categories and amounts.
- **ACCESS MYGOV PORTAL:** Link your NDIS to your [my.Gov.au](https://my.gov.au) account. This requires an Activation Code. Call 1800 800 110 to request the code. Pair the code with your last name and your date of birth (not your child’s) to access the portal.
- **CONTACT YOUR LAC:** Contact your LAC (Local Area Coordinator) and advise that you have received an NDIS plan. Request referrals from this knowledgeable resource on Plan Management and Support Coordination services before your access to an LAC ceases.
- **YOUR ADMIN TEAM:** Short list 5 potential Plan Management and Support Coordination providers from referrals and/or the MyGov NDIS “Provider Finder” database. Contact each with your funding amounts; ask about experience with similar cases at a similar stage of life, and their immediate availability. Request a phone interview to aid selection.
- **TRANSITION TIME:** Allow yourself 2 weeks to transition and implement the NDIS plan.