



# Baseline study of current and future availability of ex-service organisation advocacy services

## Summary of findings

The Australian Government Department of Veterans' Affairs (DVA) has contracted a research team from the Social Policy Research Centre (SPRC) at UNSW Sydney to undertake a baseline study of current and future availability of ex-service organisations (ESO) advocacy services.

Advocacy services – including wellbeing advocates and compensation advocates – were established by ESOs to **support ex-serving members and their families** to navigate the DVA claims processes under different compensation regimes. Over time, DVA has increased its support for advocacy services, working with ESOs to provide a training program for advocates to support different types and levels of claims processes, and providing advocacy for wellbeing.

A number of recent studies have highlighted a potential shortfall of advocates due to the age of existing advocates and problems in recruiting new advocates. However, these reports are anecdotal. The purpose of this study is therefore **to understand the current ESO advocacy workforce, and what is required to better support veterans and their families, and advocates, now and in the future to make the model sustainable**. The report also provides information to ESOs about how to potentially strengthen advocacy services.

The research included a desk top review; interviews with advocates, ESO representatives and other stakeholders (n=25), and surveys of ESOs (n=58) and advocates (n=593), to answer the following:

- Can the existing advocacy model cope with current demand?
- Can the model continue as it stands? If not, how long can it be sustained based on current workforce?

The report provides a descriptive analysis of the need for advocacy services, why people become advocates, how they become advocates, and what advocacy involves. This provides insights for DVA and ESOs about how to better support veterans and their families, and advocates, now and in the future to make the model sustainable.

## Caveats

There are inherent limitations in the research resulting from decisions taken to both protect participants' privacy and to encourage participation. Some examples are:

- Not all ESOs with advocacy services participated in the survey
- Every effort was taken to avoid double counting caused by ESO head offices and subsidiary bodies responding with the same information
- Some advocates work for more than one ESO
- A number of non ATDP-accredited and non-ESO advocates responded to the survey – which may not directly match DVA and ATDP data
- Data available from ESOs and DVA/ATDP are not comprehensive and so this research provides a basis for future data collection.

The following sections provide summary answers to the key research questions using survey data. Note that further explanation is provided in the body of the report using interview data.

## What is the current workforce of ESO advocates?

### **How many hours are current advocates working to support veterans and their families?**

- Survey respondents work about 15.4 hours per week. Volunteers work an average of 12 hours per week, while paid advocates work 25 hours per week.
- Of all advocates, around 40% work fewer than 10 hours per week, about 40% work 10–30 hours, and just under 20% work more than 30 hours per week.
- About one-third of volunteer and paid advocates intend to reduce the number of hours they work.
- Advocates provide considerable periods of time supporting veterans and their families. More than half of the advocates surveyed said they provide support for more than 12 months. Further, 30% of advocates spend up to 4 months with a veteran before a claim is submitted, and 10% spend more than 6 months with a veteran preparing a claim.

### **How will the current workforce of advocates change in the next 5 to 10 years (based on age and willingness to continue)?**

- Wellbeing and compensation advocates have two distinct skill sets. Compensation advocacy is more likely to be episodic, while wellbeing advocacy may be ongoing. Some

advocates are trained in both areas of advocacy. Compensation advocates and wellbeing advocates complement each other in supporting the needs of veterans and their families.

- Of the advocates surveyed, 19% of compensation advocates and 15% of wellbeing advocates are likely to retire in the next 2 years. This increases to nearly a third of compensation advocates and a quarter of wellbeing advocates in 4 years. Approximately half of the ESO advocacy workforce expects to continue for more than 5 years.
- Paid advocates assist around three times as many veterans or family members each than volunteer advocates. This is likely to reflect the hours worked and different ways of working.
- A total of 593 advocates responded to the survey. This included ATDP-accredited advocates (from Level 1 to Level 4) and TIP-trained advocates. Some advocates had undertaken internal training programs in parallel to or in advance of completing the ATDP training. The vast majority of advocates were associated with ESOs.
- ATDP has accredited about 850 advocates since April 2017, with about 700 advocates currently available for work. ATDP training is required for VITA insurance. ESOs may also have other insurance.

#### **What is the size of any shortfall and the locations and advocacy skills impacted?**

- Some ESOs are not able to meet demand, which means that not all veterans and their families receive immediate support. ESOs reported that over 35% of veterans and their families had to wait more than a month for an advocate, and nearly 10% for over 3 months. ESOs often referred those who required immediate help to another ESO or service.
- On average, ESOs offering advocacy services support 6 advocates – Appendix E. However, many advocates surveyed work with more than one ESO and indicated some ESOs only had a part-time advocate or accessed advocates associated with other ESOs.
- Just over half of ESOs still expect to be delivering advocacy services more than 5 years from now, but 7% will probably stop within 2 years, and 19% do not expect to continue at all.
- There is a reasonable diversity in the location of advocates and ESOs with around half of the current ATDP advocate workforce and two-thirds of the surveyed ESOs in regional, rural, or remote areas. However, some survey and interview participants highlighted a lack of services in some areas.
- The majority of current advocates gained their ATDP accreditation through Recognition of Prior Learning (RPL), with less than 24% of current ATDP advocates gaining their qualifications through the ATDP training.
- 43% of advocates are over the age of 70. However, 53% of advocates enrolled in ATDP training are under 60 years of age (includes those who are currently trained and advocates seeking additional levels of accreditation). While it is expected that the ESO advocate workforce will lose experience as advocates stop work, younger advocates will be trained under all of the Acts and are more likely to have more contemporary ADF experience.

- ESOs help share knowledge within the advocacy workforce through the ATDP mentoring requirements and through local and broader communities of practice.

### **Are advocates satisfied in their current role?**

- The main reasons people become advocates are to help veterans and the families get the help they need, to help others, to support the veteran community, and to share their knowledge, experience and skills.
- Advocates need to be accredited under ATDP and associated with an ESO in order to be insured under VITA and for the ESO to be able to access BEST funding. Less than half of advocates surveyed were happy with the training they had received under ATDP. Most mentors had received ATDP accreditation through recognised prior learning and therefore had not gone through the courses themselves.
- While mentoring was recognised as a core component of ATDP, advocates surveyed also highlighted that this was onerous on the mentor. As a result, trainees found it difficult to find an experienced advocate willing to become their mentor.
- Advocates indicated a range of reasons why they might leave their role, including the impact on their own wellbeing; age and health, family reasons; insufficient support from the ESO; ongoing training requirements; and increasing complexity of preparing claims.

### **What is required to support advocates now and in the future? What strategies could support retention of existing advocates?**

- Respondents suggested a range of additional supports that ESOs could provide, including:
  - providing support to help advocates' wellbeing
  - ensuring that ESOs understand what advocacy is
  - providing additional support for mentors
  - recognise the differences in managing volunteer and paid staff
  - creating succession plans for all parts of the workforce, including ATDP.
- Respondents also suggested ways in which DVA could help, including:
  - streamlining DVA processes and reducing the time it takes to process a claim
  - accommodating the way advocacy services are provided in the Veteran-Centric Reforms
  - valuing the contribution of advocates and ESOs providing advocacy services
  - making online supports more accessible and meaningful.

### **What strategies could be used to attract new advocates? In particular, female and younger advocates?**

- While recognising ADF experience was beneficial to the advocacy role, direct experience was not always considered essential. A good understanding of the needs of veterans and their families could also be demonstrated by family members of serving and ex-service ADF

personnel, as well as other affiliates, or learning on the job to understand the culture and language but not necessarily the trauma associated with Service.

- Some ESOs encourage new staff to transition from wellbeing support, to wellbeing advocacy and then to compensation advocacy.
- While some ESOs struggled to find volunteers, others said they turned volunteers away either because they did not meet the ESOs selection criteria (for example, concerns about their wellbeing) or they did not have enough mentors to support them through the ATDP training pathway.
- ESOs highlighted the need to **recruit both serving and ex-ADF members** from across the different services with a range of different experiences, highlighting that serving advocates received mixed levels of support from the ADF.
- There are currently far fewer **female** than male advocates (women account for 27% of ATDP accredited advocates, and 37% of those enrolled in the training program), although women were more likely to be working in paid advocacy roles (29% of female advocates work in paid positions compared to 7% of their male counterparts). Interview participants highlighted the need for more female advocates to support the growing number of female veterans. Some female advocates who participated in the survey highlighted that creating a more female friendly work environment could help attract and retain more female advocates.
- There were **challenges in recruiting younger advocates**, particularly to volunteer roles. While serving and ex-serving ADF members want to contribute, many need financial stability and are not in a position to volunteer until they reached retirement age.
- **Paid positions may be better suited to increase the number of younger advocates;** people with ADF experience could be recruited during transition seminars or within reservist cohorts. Training options may need to be developed to better meet the needs of younger advocates.
- ESOs' recruitment and retention of advocates depend on active engagement with new and younger cohorts of veterans, the training options provided, the availability of appropriate mentors, and continuing wellbeing support for advocates.

## Sustainability of the advocacy workforce

Workforces naturally fluctuate. The sustainability of any workforce is contingent on there being a balance between the need which the workforce is addressing and the changes to the workforce (number and skills). **Due to the data available, estimates of the sustainability of the ESO advocacy workforce are based on the compensation advocacy role.** Issues of sustainability are also likely to affect wellbeing advocates.

To determine the sustainability of the current workforce, the research considered a number of factors (as well as their limitations):

- The number of claims and appeals supported by an advocate (recognising this data reflects the capacity of DVA and the VRB to process claims rather than the number of claims and appeals prepared). Currently, 20% of primary claims assessed and 80–90% of applications to the VRB area supported by an advocate.
- The number and qualifications of trained advocates (acknowledging that not all currently available advocates may be practising). Current records show there are 448 advocates accredited by ATDP for compensation advocacy, which includes those who have both compensation and wellbeing qualifications.
- The average number of claims submitted by advocates surveyed each year (based on advocates surveyed). Survey responses indicated approximately 50 claims are submitted by advocates per year.
- The relatively short wait times experienced by veterans and families when seeking advocacy services (60% waited less than one month; based on self-reported data from a small sample of ESOs who responded to the survey).

Considering the overall data available, the number and qualifications of trained advocates, and the general lack of wait times, suggests the existing workforce is currently just meeting demand – although this conclusion has a number of caveats outlined above.

Recognising that both the need for and changes to the work force are likely to vary naturally over time, the research then considered the sustainability of the work force in the future by considering a number of additional factors (again, as well as their limitations):

- The expected decline in the existing advocacy workforce (based on the intention to continue practising, advocates surveyed)
- The expected increase in advocates recruited and trained (unknown)
- Expected change in demand (unknown).

Survey data indicate the current advocacy workforce is likely to decline by 19% in the next 1–2 years and a further 11% in the following 3–5 years, or 30% over 5 years. The estimates are based on existing advocates leaving rather than their work rate. High level data about advocates in training indicates this age group is younger than the qualified cohort, suggesting concerns about the age of the workforce reported in earlier studies are being mitigated. However, the rate at which trainees are qualifying and achieving different levels of competency is unknown – interview data suggests this process is taking longer than ESOs, mentors and advocates had anticipated. Additional survey data shows that many advocates are also looking to reduce their workload, suggesting that workforce capacity is likely to reduce more than indicated above. **In considering the overall data available, and the anticipated loss to the workforce over the next 5 years, attention must be given to the recruitment, training and mentoring of new advocates to ensure the sustainability of the workforce; further, the competency of advocates needs to increase to compensate for the likely decline in overall skills lost by those leaving.**

While the current ESO advocacy workforce appears to be meeting the needs of most veterans who ask for advocacy support, there is a risk the ESO advocacy workforce becomes unsustainable if the need for services continues to rise, and the workforce is not being replenished quickly enough with the equivalent level of skills and capacity. While there seems to be a natural progression of ESOs starting to work together, this report highlights additional factors DVA and ESOs may consider in improving the sustainability of the ESO advocacy workforce.

Policy makers (Defence, DVA and ESOs) need to be aware of the need to **maintain the balance** between need and staffing to ensure the workforce remains sustainable. Key factors likely to affect the sustainability of the ESO advocacy workforce are:

- Significant changes to the number of veterans requiring support
- Significant changes to the determination of claims
- Attracting new advocates (paid or volunteer)
- The time taken to train new advocates to the level of competency required (for the trainee and also the mentor and ESO)
- Length of time advocates work after training
- Proportion of paid vs volunteer advocates, hours worked, and models of service
- Resources available to provide advocacy services.

The current model relies heavily on volunteers who tend to have financial independence, whether through veteran compensation or having reached retirement age – therefore, without more paid positions, the cohort of advocates is likely to remain older, although there is evidence showing the age of advocates is decreasing slightly. With greater access to training and assessment, as well as other improvements, the ESO advocacy workforce could be more sustainable.

## Improving the sustainability of the ESO advocacy workforce

This research study identified a number of broader considerations to improve the sustainability of the advocacy workforce, relating to the need for services and providing enough advocates with the necessary skills and training to meet those needs. They include:

- Making advocacy services more accessible to veterans and their families rather than just word of mouth
- Increasing the breadth and quality of the advocacy workforce
- Supporting advocates in the workplace
- Improving ATDP to ensure it meets the needs of ESOs, advocates and veterans
- Improving the systems, processes and relationships between Defence, DVA, veterans, ESOs and advocates

Without addressing ongoing need for advocacy and the likely reduction in the ESO advocacy workforce, the workforce is likely to be unsustainable. This may impact both the wellbeing of veterans and their families, their access to rehabilitation and compensation, as well as the quality of claims and reviews lodged with DVA and the VRB. While the focus of analysis has been on compensation advocates given the data available, the improvements also relate to wellbeing advocates who are integral to the ongoing support of veterans.

## Conclusion

This research was an in-depth study of advocacy services, drawing on data from surveys and interviews, and other supplementary data. The breadth of data demonstrates the difficulty in being able to accurately predict whether the ESO advocacy model is sustainable. Sustainability is dependent on both the need for advocacy and the supply of advocacy services. With regard to need, this will depend on a range of factors including the number of serving personnel who transition to civilian life, the number and complexity of claims, the claims process itself (acknowledging DVA's efforts to simplify this process), and the time it takes to process claims. The supply of advocates will depend on the ability to recruit new volunteers, the willingness and capacity of existing advocates to mentor trainees, the responsiveness of the training program, and the willingness of current advocates to continue in the job. Retention of existing advocates also depends on ongoing training, workload, support and wellbeing.

In brief, the findings from this research indicate that advocates will be needed for the foreseeable future, the present system is sustainable but only just, and it needs to change to remain sustainable. There are suggestions that the need for advocates is growing following the introduction of MyService, in particular supporting applications to appeal decisions from veterans making claims directly; however, at this point in time, there are no data available to substantiate this claim other than an anticipated 25% increase in applications to the VRB for 2020/2021. The need for advocates may increase, at least in the short term. The current system is working but is under considerable pressure and it will require some significant changes to remain sustainable over the medium (1–2 years) and longer term (3+ years).

While the ESO workforce appears currently sustainable at a macro level (services are required, advocates are trained, veterans access support), it may not be sustainable at a micro level, that is, some advocacy services are likely to discontinue. It was clear from interviews with a range of ESOs that some ESOs were more sustainable than others; some were struggling to find volunteers across their organisation and others were closing, while other ESOs were growing and providing supports to both veterans and to advocates. There are some models of advocacy that have evolved from the grassroots that may address concerns of sustainability in the overall model. There is also variation; some provide only advocacy services, while others provide more holistic supports and outreach programs. Concerns about the sustainability of the model may appear in some places to have been addressed as organisations respond to change in need and workforce.

There are clear benefits to veterans and their families, to the ADF and DVA, and to the broader community to support advocacy services.

As indicated in a number of places in this report, there is a lack of accurate information about the number of active advocates and mentors, their current caseload, the quality of advocacy provided, the time it takes to prepare and assess claims, and the impact of advocacy on these timelines. It is

important for future monitoring and quality assurance of the system that better data are collected about the advocacy workforce, processes and claims. This could include surveying recently accredited ATDP trained advocates about whether they are practising, and if not why not.

This report was prepared for: Australian Government, Department of Veterans' Affairs by Shona Bates, Megan Bedford, Ilan Katz at the Social Policy Research Centre, University of New South Wales Sydney.

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The full report is available [here](#).

# Definitions

The following summarise the definitions used in this report:

<p>Veteran</p>	<p>Throughout this report the term veteran is used consistent with DVA's definition – a person who has served one day of fulltime service in the ADF (Interview 2). See <a href="http://www.dva.gov.au/health-and-treatment/veteran-healthcare-cards/veteran-card">www.dva.gov.au/health-and-treatment/veteran-healthcare-cards/veteran-card</a>. Therefore, veteran includes serving and ex-serving members of the ADF. However, not all ex-serving members who participated in this study identify as veterans. As one participant said:</p> <p style="text-align: center;">I am not a war veteran. I am an ex-service member. ... I still hold the accolade for those who went to war, rather than those who practiced. (Interview 10)</p> <p>Prior to the Vietnam conflict, earlier cohorts identified as returned servicemen/women (Interview 8). This distinction between ex-service member and veteran was often a factor in whether someone joined an ESO which many perceived were for those who had seen 'active service'; older cohorts were also perceived to be more likely to join an ESO 'just as a matter of course... to be connected' (Interview 5).</p>
<p>Advocate</p>	<p>Where the term advocacy is used, it is used in terms of trained, experienced wellbeing and compensation advocates who trained and qualified under ATDP or its predecessor TIP and who do not charge more than a nominal fee to cover administrative expenses for this service. Note that this role may be undertaken by a volunteer or paid member of staff associated with an ESO.</p> <p>We recognise that informal advocacy may also be provided by family members, friends and colleagues, and advocacy may be sourced and paid for from lawyers or consultants on a fee basis; however, neither are included in this report.</p>
<p>Client</p>	<p>In relation to both ESOs and DVA, a client refers to a veteran (serving, transitioning or ex-serving) or family member (including spouse, widow/er or dependant).</p>
<p>Ex-service organisation (ESO)</p>	<p>Any organisation providing support to veterans and/or their families. An ESO may comprise of a mix of volunteers and paid staff. Further explanation of the role of ESOs is available at <a href="https://www.defence.gov.au/DCO/Transition/Family/ESO.asp">https://www.defence.gov.au/DCO/Transition/Family/ESO.asp</a> and is defined in the VITA constitution at <a href="https://web.atdp.org.au/docs/vita/VITAconstitution.pdf">https://web.atdp.org.au/docs/vita/VITAconstitution.pdf</a>.</p>

# Abbreviations

ADF	Australian Defence Force
ASQA	Australian Skills Quality Authority
ATDP	Advocacy Training and Development Program
BEST	Building Excellence in Support and Training
CPD	Continuing Professional Development
DRCA	Safety, Rehabilitation and Compensation (Defence-related Claims) Act 1988
DVA	The Australian Government Department of Veterans' Affairs
ESO	Ex-service organisation
MRCA	Military Rehabilitation and Compensation Act 2004
RTO	Registered Training Organisation
TIP	Training and Information Program
RPL	Recognised Prior Learning
SAS	Special Air Service
SOP	Statement of Principles
SRCA	Safety, Rehabilitation and Compensation Act 1988
VEA	Veterans' Entitlements Act 1986
VITA	Veterans' Indemnity and Training Association
VRB	Veterans' Review Board