Referrals for “money management assessment to support AO application”
Assumption that an AO was the solution to the person’s financial situation and ability to manage their own money.
New Group survey, respondents identified:
1. 100% of clinicians surveyed identified consumer’s main aim/goal is to “get off my AO”
2. 95% clinicians reported money management as most observed ADL/IADL functional issue.
Experience told me people have baseline skills/knowledge.
OT specialises in living skills! But what are we offering for such an overwhelmingly problematic living skill for people?
Evidence

- OTs currently using various generic task analysis type tools.
- Lack of evidence based standardised assessment and intervention tool.
- Very little evidence available for mental health specific.
- Majority of evidence is USA based and regarding inpatient D&A abstinence rehab programs.


Provided a loose evidence based program, although USA context.
Theory & Design

- MOHO – volition, habituation, performance capacity, environment
- 8 Weekly topics or themes – adapted from those described in the research.
- Focus on their own individual context and circumstance – meaning and relevance.
- Take home activities – create opportunities for application, self reflection performance critique and
- Option for formal assessment
Group Program

- Wk1: Self evaluation and appraisal of skills, habits and behaviours
- Wk2: Calculations and money literacy
- Wk3: Knowledge of income/expenses
- Wk4: Budgetting and savings
- Wk5: Understanding and planning for bills
- Wk6: Reducing living costs
- Wk7: Money safety
- Wk8: Reflection
Outcomes

- 4 participants in the semester.
- 3 of the 4 **STRONGLY AGREED** and 1 **AGREED** with the following statements:
  - I have increased my money management skills and knowledge as a result of participating in this group
  - I have increased awareness of community resources and supports for money management services through participating in this group
  - I have a greater understanding of my personal financial circumstance resulting from participating in this group.
Outcomes Contd.

Participant 1:
- "...less stress because I am not worried about my money as much."
- "Increased confidence to approach the bank and make choices about what account to open up"
- "(I have) opened another bank account for saving (and) have saved $110 since opening it and it's only been 2 fortnights"
- "Have a financial plan to pay off credit card debt and save money"

Participant 2:
- "A good sense of self value and self reliance"
- "I have achieved my own sense of self value and self priority and self importance"
- "I have learnt how to collect my own information and about my own income and pay my bills according to the amount of money I have"
- "...I can see patterns in my own spending and reflect on what bills I have got and what money I can put on them"

Participant 3:
- "Be more independent, save money, shop around and only buy what's necessary"

Participant 4:
- "Better financial management skills"
Questions
Thank you

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