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SPECIALIST DISABILITY ACCOMMODATION

Supply in Australia

March 2019

SUMMER FOUNDATION

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GLOSSARY

CHP	Community Housing Provider
DGR	Deductible Gift Registration
DSP	Disability Support Provider
NDIA	National Disability Insurance Agency
NDIS	National Disability Insurance Scheme
NFP	Not for Profit
SA4	Statistical Area level 4
SDA	Specialist Disability Accommodation
SIL	Supported Independent Living

Foreword

It is with great enthusiasm and optimism that Social Ventures Australia and the Summer Foundation present this report into the growth in supply of Specialist Disability Accommodation (SDA) across Australia.

Specialist Disability Accommodation Supply in Australia is the most comprehensive snapshot undertaken to date on how the market is responding to the opportunity to expand housing supply for people with disability.

The report's finding, that more than 1,500 new SDA places are in the construction pipeline, should be welcomed by people with disability, governments and the broader supply market.

This report highlights geographies and building types where the SDA market has had a strong early response, and shines a light on areas where SDA supply remains weak and needs more focus by providers and government.

Social Ventures Australia and the Summer Foundation share a vision for an Australia where people with disability have access to high quality housing that meets their needs and fosters connection to communities.

Our organisations partnered on this report because we know that robust evidence and data are key enablers of a successful SDA market that delivers on this vision for people with disability.

We hope this report will inform and guide the next phase of investment in SDA. Greater transparency of what is underway and where, will enhance the confidence of those actively involved in the market and allow stakeholders to make more informed investment decisions.

We also anticipate that this data will aid governments and market intermediaries to identify where the SDA market is lagging and where more focused efforts to generate SDA supply might be needed.

The SDA market is still in its infancy. There is still much more to do to create an SDA market that delivers the scale of housing anticipated – including 12,000 new places and redevelopment of a large segment of the existing 16,000 places.

Social Ventures Australia and the Summer Foundation look forward to continuing to work with people with disability, providers, investors and governments to create an SDA market that delivers on the vision of housing for people with disability.

Luke Bosher
CEO,
Summer Foundation

Diana Ferner
Director, Consulting and Disability Lead
Social Ventures Australia

Executive Summary

Specialist Disability Accommodation Supply in Australia is a report on new supply and potential undersupply of Specialist Disability Accommodation (SDA) across Australia.

This report is based on a survey of SDA providers across Australia undertaken in late 2018. The survey collected data about new SDA projects under development in order to determine how many SDA places are in the pipeline (i.e. being planned or constructed). The data presented in the report came from 55 SDA providers who responded with details of their SDA development projects.

The survey indicates that there are 1,518 SDA places in development around Australia, with the most activity in NSW, Victoria and South Australia.

Number of SDA places reported in development or newly enrolled

ACT	32
NSW	635
NT	0
QLD	99
SA	336
TAS	14
VIC	386
WA	16
National	**1,518**

The **Specialist Disability Accommodation Supply in Australia** report was created to provide much-needed data on the nascent SDA market to encourage further investment and speed the creation of specialist housing for people with disability. The report indicates that a solid start has been made in the new SDA market, with more than 2,000 new SDA places either enrolled (registered with the NDIS) or in the development pipeline. This takes into account 718 places of newly built SDA enrolled with the NDIA as at 31 December 2018.

However, with around 12,000 new SDA places needing to be created to meet the anticipated demand from NDIS participants with SDA funding, increased market confidence to encourage further investment is essential.

The survey has revealed that:

- The current SDA development pipeline is dominated by High Physical Support designs, with very little Robust capacity being built
- The most common building types are apartments and group homes
- More than 80% of places are at pre-construction or construction stages of development
- Three-quarters of the reported supply would be delivered by early 2020
- The estimated undersupply of SDA is concentrated in the major cities, except for South Australia where Adelaide already has significant new supply in the pipeline

A range of provider types responded to the survey, with not-for-profit providers dominating activity, mainly community housing providers (the latter responsible for nearly 60% of the reported supply).

Background

What is SDA?

Specialist Disability Accommodation (SDA) is housing that has been specially designed to suit the needs of people who have 'extreme functional impairment' or 'very high support needs'.

SDA payments for individual participants under the National Disability Insurance Scheme (NDIS) enable them to pay to live in SDA housing. It is expected that around 28,000 people under the NDIS will be funded for SDA, with the NDIS eventually spending around $700 million per year on SDA payments.

SDA payments are provided for purpose-built housing for NDIS participants with very high and complex support needs, to enable them to lead an ordinary life. These payments are made to a provider of an SDA property when someone who has been approved for SDA funding is living in it.

The SDA model of funding under the NDIS creates a user-driven market that enables people with disability to decide where they live and who they live with. The model will deliver better housing outcomes for people with very high and complex disability support needs.

The SDA housing market is a new and exciting market which is expected to create thousands of new dwellings for people with disability over the next few years. However, there is complexity in the way policy governing SDA payments operates, set out in the SDA Pricing and Payment Framework and associated documents (ndis.gov.au/providers/price-guides-and-information/sda-pricing-and-payments). To date there has been significant uncertainty in the market about where to build new SDA housing and who for.

Previous SDA market analysis

In 2018 the Summer Foundation and SGS Economics and Planning published the *Specialist Disability Accommodation Market Insights* report which estimated current SDA supply and potential demand. As NDIS data was not available at that time, this analysis used a proxy data source (Disability Services - National Minimum Data Set, providing administrative data from state disability service systems) to establish demand and supply in indicative terms. You will find the *Specialist Disability Accommodation Market Insights* report at: summerfoundation.org.au/resources/sda-market-insights/

In 2017, as part of the analysis being undertaken for this report, the Summer Foundation and the Australian Housing and Urban Research Institute conducted a limited survey of SDA providers to determine how many SDA places were under development around Australia. Due to limitations in the survey responses and the relative immaturity of the market, the results were not published. But more than 900 places of new SDA were identified through this survey.

When the *Market Insights* report was presented at a series of seminars and other forums around Australia in 2018, there were calls for data that would give an indication of the SDA development pipeline, to improve confidence in the direction of locations for new SDA investment.

New SDA data from the NDIS

The lack of data about people being funded for SDA or current SDA supply was recognised in KPMG's *NDIS Specialist Disability Accommodation Pricing and Payments Framework Review* to be a significant barrier for investment in growing the stock of SDA.

The National Disability Insurance Agency (NDIA) began providing more extended SDA data in its September 2018 quarterly report. The latest available data (from the December 2018 report) indicates 10,975 participants have SDA funding in their plans (39% of an expected total of 28,000 participants with SDA funding), and there are 2,593 dwellings enrolled as SDA.

Background (continued)

However, there are a number of limitations with the reported data in providing indications of demand for new SDA housing and where additional SDA housing is needed:

- People living in supported accommodation prior to the transition to the NDIS often automatically receive SDA funding in their plans reflecting the accommodation they are currently living in. If they move, it is unclear whether and at what level they would receive SDA funding
- The number of enrolled dwellings is not provided by number of bedrooms/places for SDA-funded participants, so it is difficult to assess capacity in current SDA supply
- Enrolment data does not include "in-kind" SDA – these are dwellings owned by state and territory governments and enrolled as SDA, but SDA payments are treated as pre-paid support in a participant's plan. This housing is generally group homes or larger residential settings, which do not reflect contemporary practice. This housing forms part of the current SDA supply, but is not visible in the current reporting
- Due to the staged rollout of the NDIS, the quality of the data in some jurisdictions is less reliable than in others
- Enrolment data does not include committed SDA developments currently in the pipeline

There is now a strong commitment from the NDIA, backed by recent directions from the Disability Reform Council, to continue to provide and improve SDA data on participants and supply.

This report includes some newly released data on newly built SDA places provided by the NDIA. Refer to p.35 in this report.

In addition, as part of a number of reforms announced to the SDA Pricing and Payment Framework, a commitment has been made to enable SDA providers to pre-certify dwellings to be built. This is a potentially useful source of future data about the SDA development pipeline, but will only reflect those projects which are pre-certified (not a mandatory process). Pre-certification processes for new SDA development are expected to commence later in 2019 (dss.gov.au/disability-and-carers-programs-services-government-international-disability-reform-council/review-of-the-sda-pricing-and-payments-framework).

In lieu of available data on the state of current and pipeline SDA supply from the NDIA, the Summer Foundation and Social Ventures Australia (SVA) have partnered to undertake a survey on the development pipeline of SDA supply to supplement the previous Market Insights report. The results that follow highlight where the SDA market has had a strong early response and where there is a need for greater focus by providers and government.

Survey methodology

SVA partnered with the Summer Foundation to develop the survey, undertake the data analysis and jointly produce this report.

A survey instrument was designed to capture key aspects of SDA development projects.
Data items included:

- Organisation
- SDA Building Type
- SDA Design Category
- Number of bedrooms
- SDA capacity (number of SDA places, which could be less than number of bedrooms)
- Location
- Expected date available for occupancy

Background (continued)

- Stage of development:
  a. Completed after 1 April 2017 and enrolment confirmed with NDIA
  b. Construction completed, pending enrolment
  c. Under construction
  d. Development and building approval completed and contractually committed to build
  e. Land secured, waiting for development approval, building approval and/or finance approval

The survey instrument was developed and tested with six active SDA developers of different types and two SDA investors to check utility of the resulting data and willingness to disclose information requested.

A survey invitation list was developed from a number of sources:

- An edited version of the NDIA's provider list for SDA services (duplicates across jurisdictions were removed as well as providers listed that did not have a clear public online presence, or whose website indicated they were likely to be providers of existing SDA)
- SDA providers listing vacancies with The Housing Hub, an information platform to connect searchers with providers
- Providers who had engaged with the Summer Foundation through seminars, meetings and other contacts
- Peak provider organisations including the Community Housing Industry Association, PowerHousing and National Disability Services were approached to promote the survey to their networks.

At the closing date of the survey in January 2019, more than 80 responses had been received, with 60 organisations providing data and most others indicating they had no SDA development planned, or that their projects were at an earlier stage. A small number of providers indicated they could not provide data for commercial reasons.

Following data cleansing, data from a total of 55 providers was used for the analysis in this report.

National overview of results

Fifty-five SDA providers submitted data to the survey and reported a total of 1,518 new SDA places, most of which are in the development and construction phase. The following map indicates the location of new SDA supply, as determined from responses to the survey.

Figure 1 – Location of new SDA places in development

Most new SDA development activity is occurring in New South Wales, followed by Victoria and South Australia. The following table sets out the number of SDA places in development or newly completed, reported by jurisdiction.

Table 1 – New SDA places by jurisdiction

	Number of SDA places
ACT	32
NSW	635
NT	0
QLD	99
SA	336
TAS	14
VIC	386
WA	16
National	**1,518**

Figure 2 – New SDA supply by jurisdiction

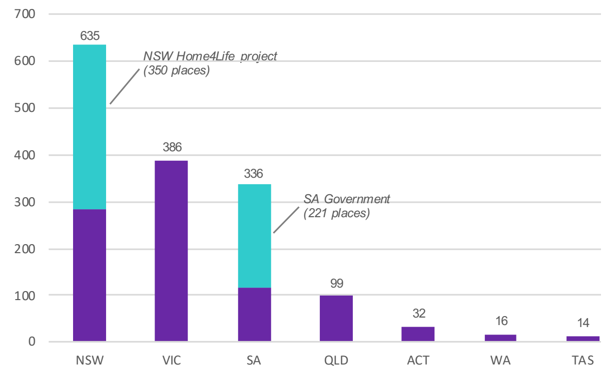


Figure 2 indicates a large number of SDA places in the pipeline in NSW. Note that in both NSW and SA the data reported reflects government initiatives to either transition existing SDA residents into improved SDA settings or create new SDA supply. These are one-off supply initiatives outside normal market processes (in the case of NSW this is a supply initiative to rehouse people currently living in large residential facilities).

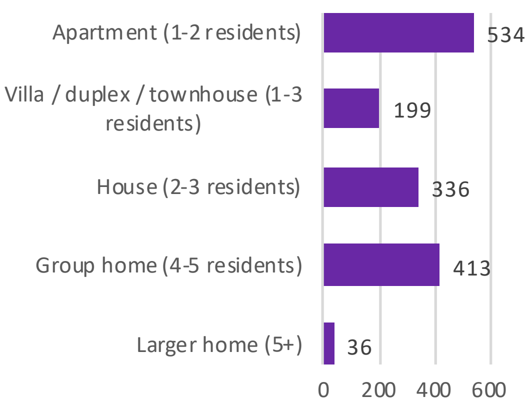
Type of new SDA reported

The NDIS provides funding for SDA on the basis of specified building types and categories (refer SDA price guide - ndis.gov.au/providers/price-guides-and-information/sda-pricing-and-payments).

Building Type

Figure 3 illustrates SDA places reported from the survey by Building Type. Apartments are the most frequent building type reported from the survey (534 places reported). However, there are also significant numbers of other building types – villa/duplexes of 1-3 residents (199 places), 1 to 3-bedroom houses (336 places) and group homes of 4-5 residents (413 places – noting that 350 of these are reported from one provider, associated with the NSW government-funded initiative to replace existing large residential facilities in that state).

Figure 3 – New SDA supply by Building Type



Design Category

Figure 4 illustrates SDA places reported from the survey by Design Category. The most significant design category reported in the survey results was High Physical Support (960 places) with smaller numbers of Improved Liveability (242 places) and Fully Accessible (254 places) SDA. Only 62 Robust SDA places were reported.

Figure 4 – New SDA supply by Design Category

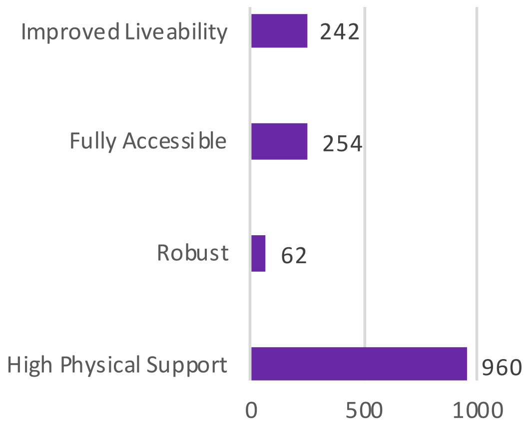


Table 2 illustrates the spread of SDA design categories across building types in the development pipeline, indicating that most apartment and group home places reported are in the High Physical Support design category but many houses are in the Improved Liveability category.

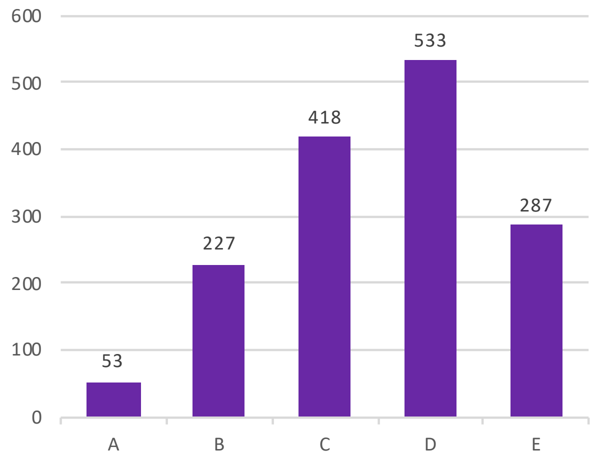
Table 2 – New SDA supply by Building Type and Design Category

	Improved Liveability	Fully Accessible	Robust	High Physical Support
Apartment	88	121		325
Villa/ duplex/ townhouse	25	53	20	101
House	129	52	30	125
Group home		28	12	409

Stage of SDA development

Figure 5 illustrates the stage of development of the reported SDA supply in development (by number of SDA places). This indicates most projects reported are at pre-construction and construction phases (1,238 places in total). Fifty-three places are reported as newly enrolled.

Figure 5 – New SDA supply by stage of development



Legend: Development status

A. Completed after 1 April 2017 and enrolment confirmed with NDIA

B. Construction completed, pending enrolment

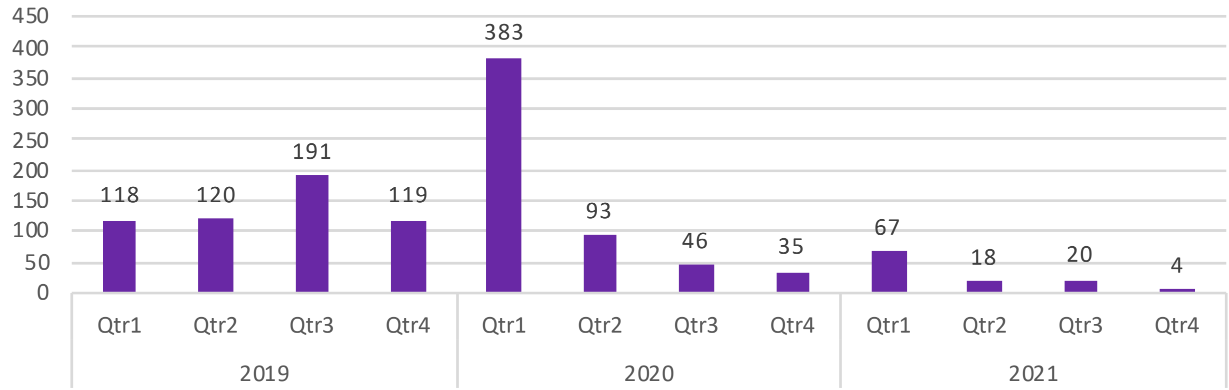
C. Under construction

D. Development & building approval completed & contractually committed to build

E. Land secured, waiting for development approval, building approval and/or finance approval

Figure 6 illustrates the expected completion date of SDA supply reported in the survey, with 76% of places scheduled to be complete by early 2020.

Figure 6 – New SDA supply – expected completion date



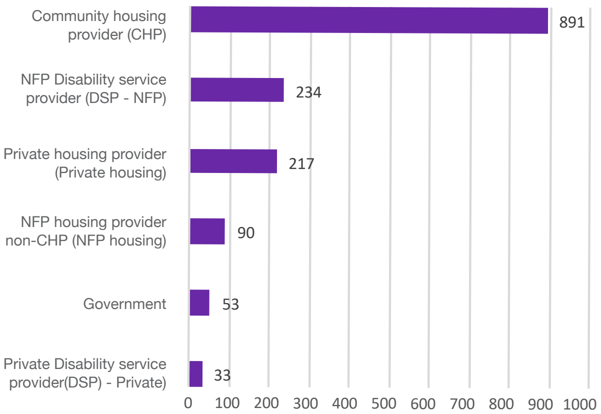
Profile of new SDA developers and providers

The following charts and tables provide some insight into the scale of SDA development activity by type of provider, and the type of SDA being developed by provider type.

This information highlights the range of organisations active in SDA development at this stage, including the key role being played by not-for-profit organisations (especially community housing providers), but also activity emerging from private SDA providers.

Figure 7 shows that community housing providers dominate new SDA development at this point, associated with a total of 891 SDA places in development. Figure 7 also indicates the diversity of providers developing new SDA. This includes a range of not-for-profit and private housing organisations and disability service provider organisations involved in new SDA development, as well as government agencies.

Figure 7 – SDA provider type by number of SDA places in development



Legend: Provider types

Community housing provider (CHP): Organisations registered with the National Regulatory System for Community Housing (NRSCH) as a Tier 1, 2 or 3 housing provider

NFP housing provider, non-CHP (NFP housing): Organisations with Deductible Gift Registration (DGR) status, that are not a provider of NDIS core or SIL services and not a registered CHP

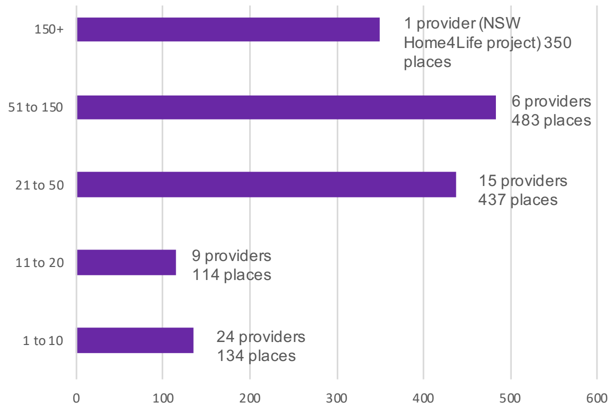
Private housing provider: Commercial entity that does not have DGR status, not a provider of NDIS core or SIL services

Disability service provider (DSP): Organisations that are a provider of NDIS core or SIL services or aged care service (including not-for-profit and for-profit providers, private landlords, family run projects and organisations providing Residential Aged Care services)

Government: Commonwealth, State or Territory or Local Government agencies that register as the SDA provider

Figure 8 indicates the providers by number of places being delivered, indicating more than half the providers who responded to the survey have 11 or more SDA places in development, with 6 providers with between 50 and 150 places in development.

Figure 8 – SDA providers by scale of SDA development activity



Profile of new SDA developers and providers (continued)

The following tables show the building types and design categories of SDA being developed by different types of SDA providers. There are a number of group homes and High Physical Support design category places reported by community housing providers. This result is influenced by a NSW government initiative to build 350 new SDA places, which is being delivered by a major community housing provider in that state. As noted earlier, this is a one-off initiative. Table 4 indicates the small number of Robust category places in development, mainly by not-for-profit providers.

Table 3 – Provider type by building type

	Apartment	Villa/duplex/ townhouse	House	Group home
Community housing provider (CHP)	258	98	174	361
NFP Disability service provider (DSP - NFP)	78	72	11	73
Private housing provider (Private housing)	93	27	87	10
NFP housing provider, non-CHP (NFP housing)	90			
Government			53	
Private Disability service provider (DSP - Private)	15	2	11	5

Table 4 – Provider type by design category

	Improved Liveability	Fully Accessible	Robust	High Physical Support
Community housing provider (CHP)	167	133	40	551
NFP Disability service provider (DSP - NFP)	19	105	20	90
Private housing provider (Private housing)		12		205
NFP housing provider, non-CHP (NFP housing)				90
Government	53			
Private Disability service provider (DSP - Private)	3	4	2	24

Liz's story

Moving in to her new apartment in Summer Housing's Fairfield development this year has been life changing for Liz.

"I'm in my 30s and I'd never had a place of my own to live – ever," Liz said.

"Nothing is yours when you live somewhere that's run by an organisation because you always feel like you're intruding. Now, I walk in the door and I think 'hang on, I'm home and I'm not intruding on anyone else's space'. It's awesome."

Liz, who has cerebral palsy, had lived in two group homes over six years before she moved in to her Fairfield apartment.

For the 33-year-old who works for a disability service provider, the location of the development is perfect. "It takes me 15 minutes to get into the city on the train and there's also a bus I could get, which I'm looking forward to trying. I actually have options now."

Liz has an NDIS plan with SDA – high physical support. "My NDIS plan gives me flexibility of support and choice and control of who provides these supports."

The Fairfield apartment is one of 10 peppered throughout a private development of 77 units. The SDA apartments, in single or multiple bedroom layouts, feature accessible and customisable kitchens and bathrooms, as well as smart home technology to enable tenants to maximise their independence and privacy. Access to 24-hour on-site support is available.

"I'm actually living in the community now," Liz said. "It's just normal."

Where is the new SDA supply?

Introduction to maps

The following maps indicate the extent of new SDA in development (as recorded in survey responses) mapped to SA4 level (refers to Statistical Area Level 4 – for explanation of statistical areas, refer to the Australian Bureau of Statistics website: www.abs.gov.au/websitedbs/D3310114.nsf/homeAustralian+Statistical+Geography+Standard+(ASGS)).

Charts for each jurisdiction compare the distribution of new SDA supply in that jurisdiction by building type and design category with the national figures from the survey.

Note that these figures do not represent all SDA development activity as a numberof providers who may have SDA developments underway did not respond to the survey.

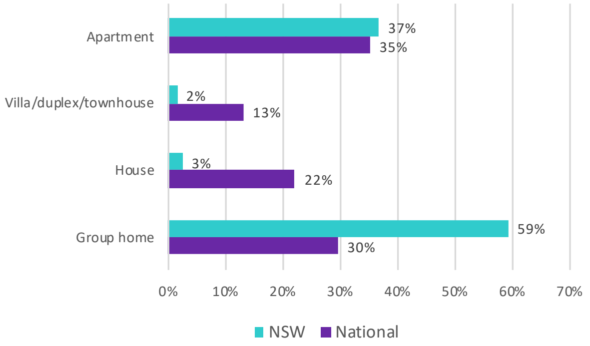
Detailed data by SA4 is provided in the appendices.

Map 1: New South Wales – New SDA development

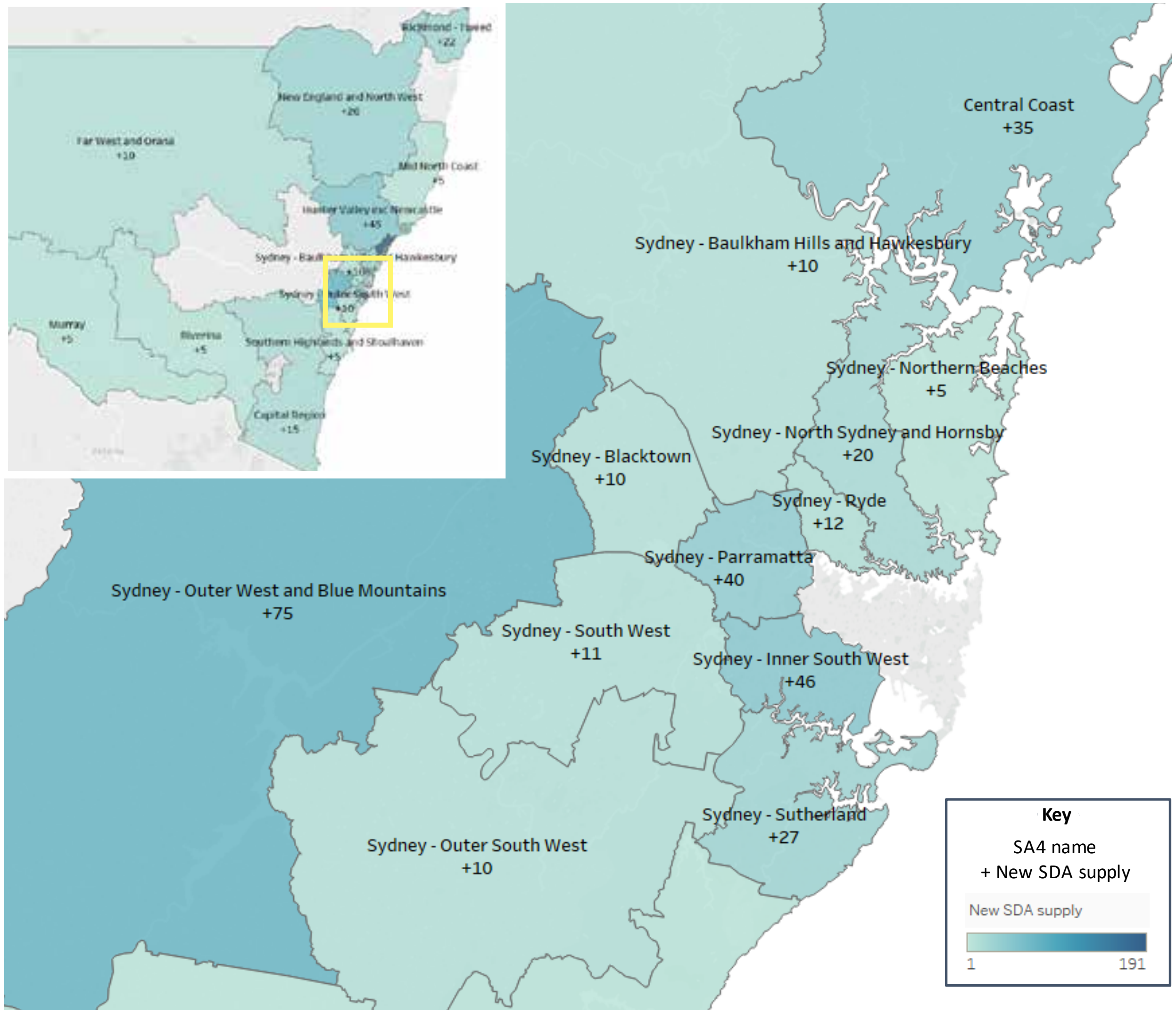
New South Wales overview

There is significant SDA development underway in the south and west of Sydney, and around Newcastle.

NSW – SDA new supply by Building Type



NSW – SDA new supply by Design Category

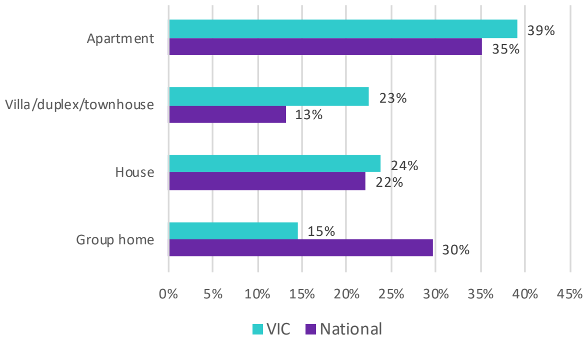


Map 2: Victoria – New SDA development

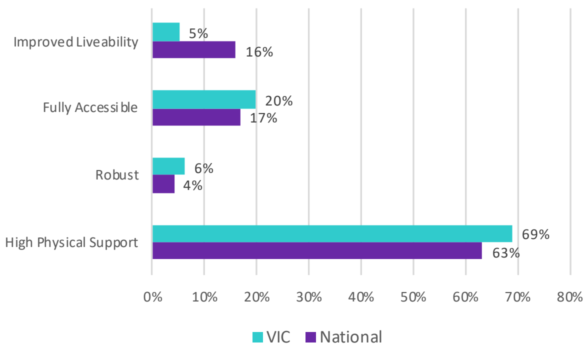
Victoria overview

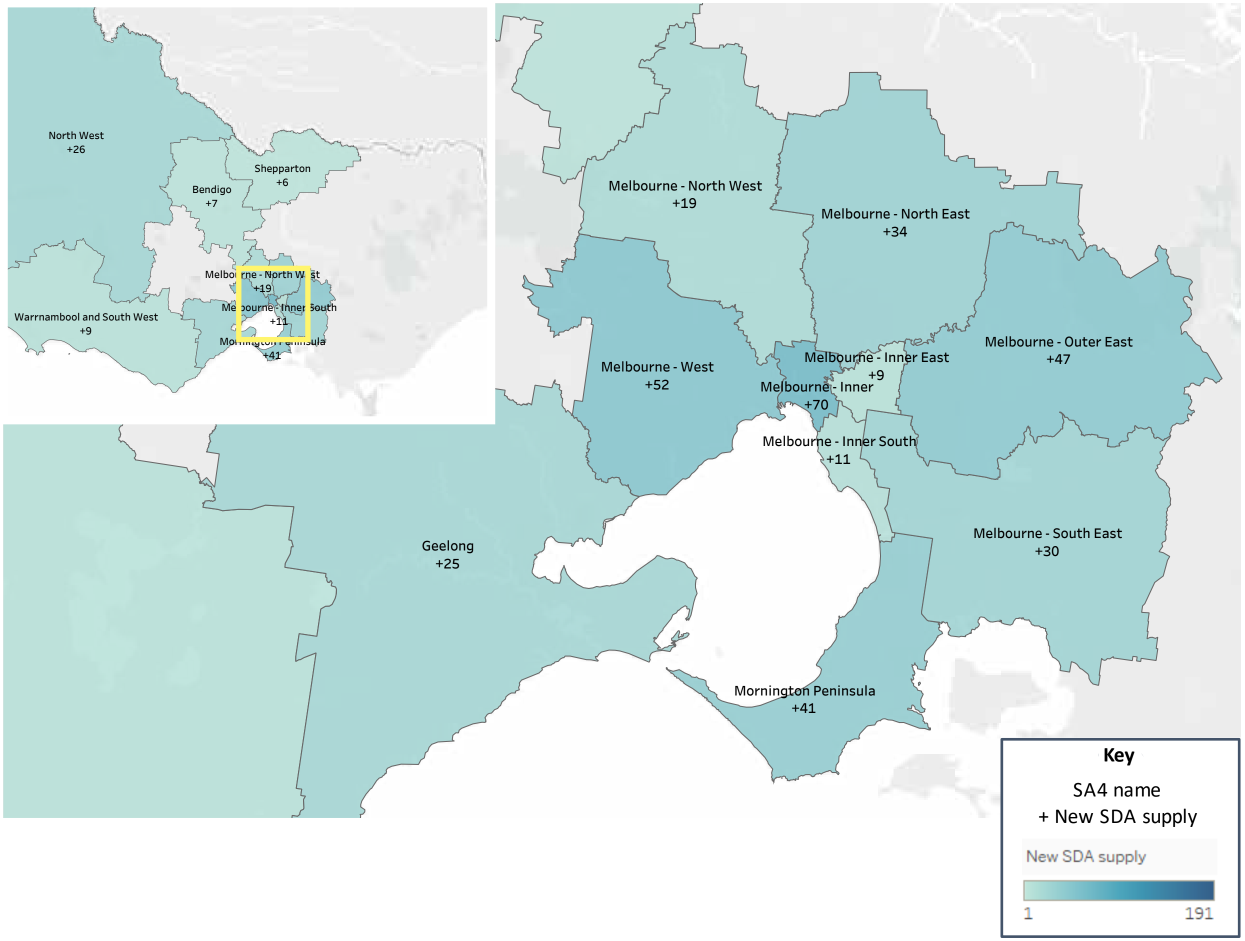
New SDA development is mostly spread around the Melbourne area, with some additional development in the north-west.

VIC – SDA new supply by Building Type



VIC – SDA new supply by Design Category



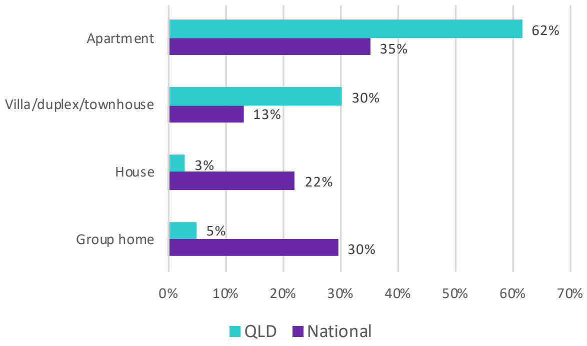


Map 3: Queensland – New SDA development

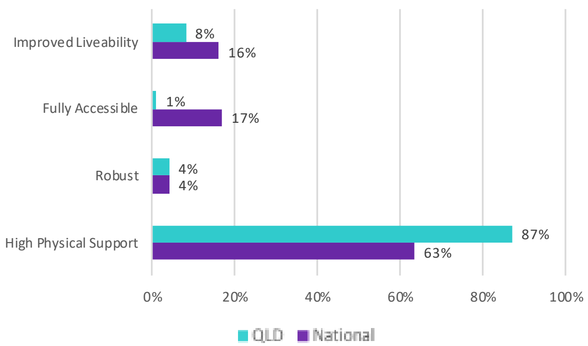
Queensland State overview

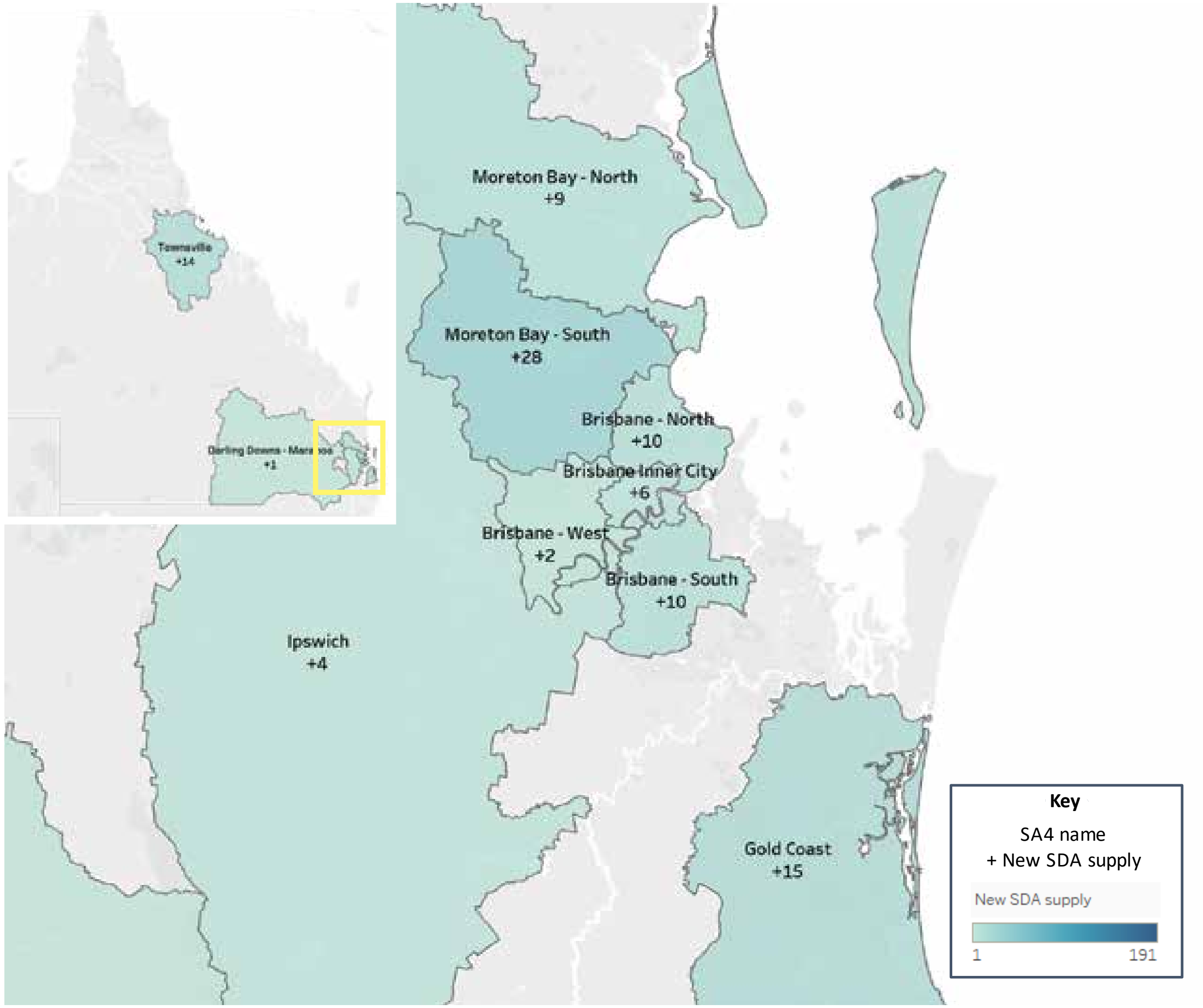
New SDA development is concentrated around Brisbane, with some development in the Gold Coast and Townsville.

QLD – SDA new supply by Building Type



QLD – SDA new supply by Design Category



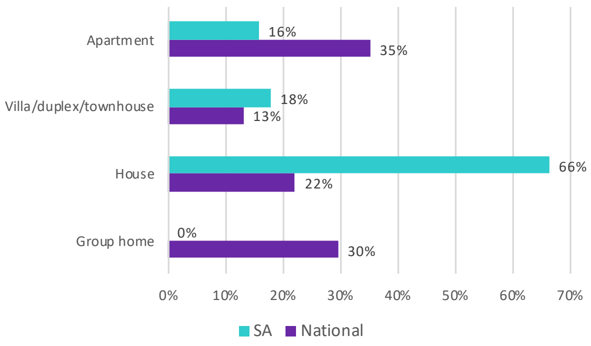


Map 4: South Australia – New SDA development

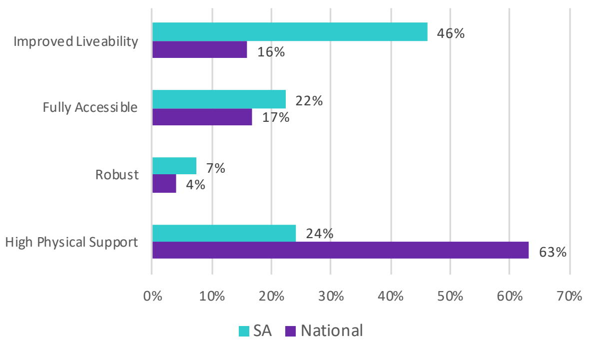
South Australia overview

New SDA development is occuring mainly in Adelaide and the south-east.

SA – SDA new supply by Building Type



SA – SDA new supply by Design Category

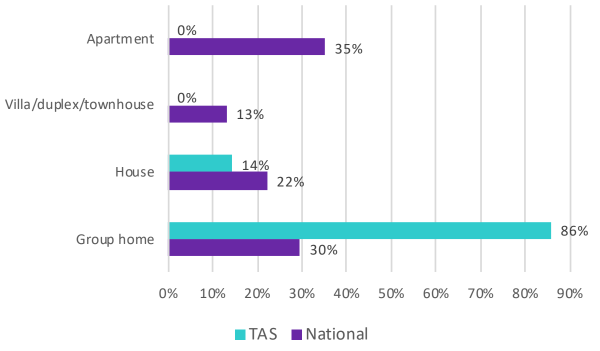


Map 5: Tasmania – New SDA development

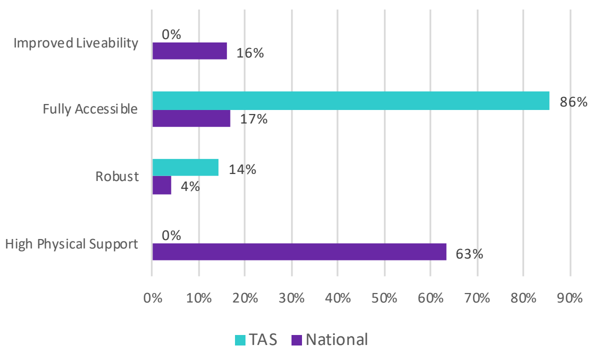
Tasmania overview

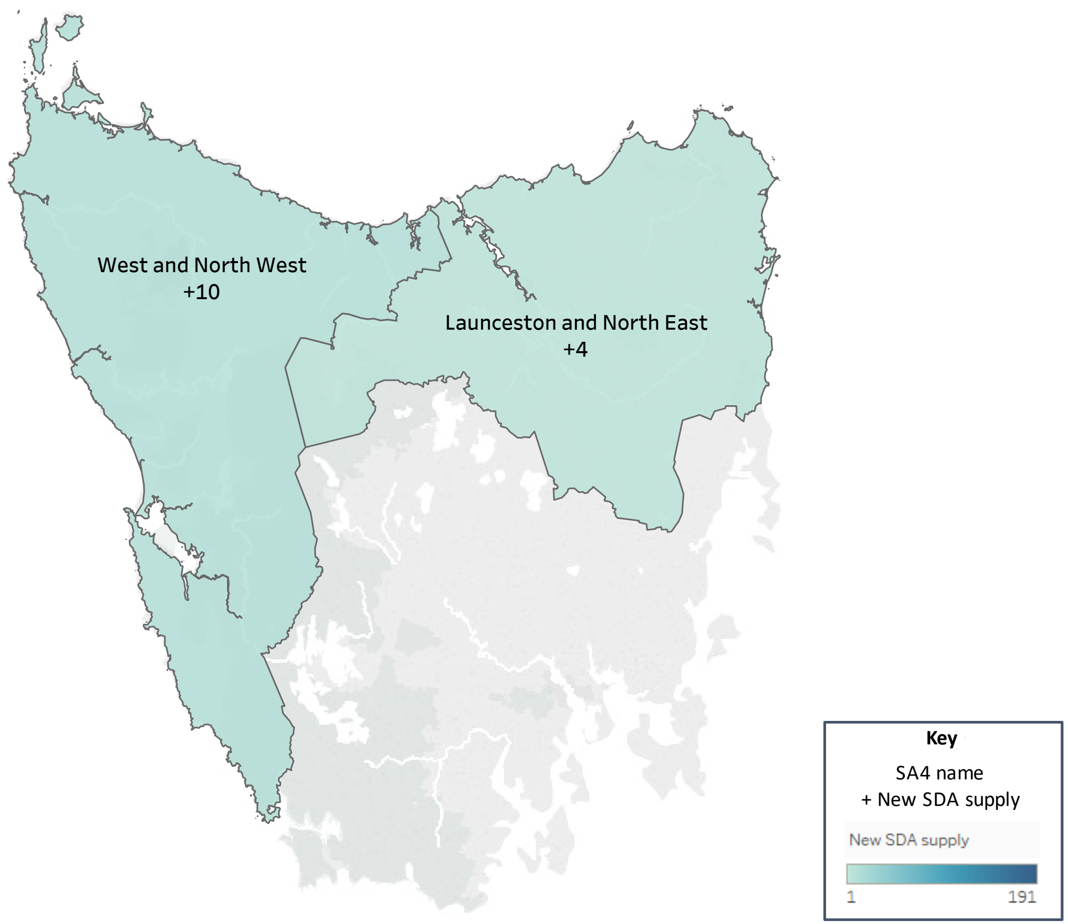
Limited SDA development was reported for Tasmania, with known activity in the north-east and north-west.

TAS – SDA new supply by Building Type



TAS – SDA new supply by Design Category



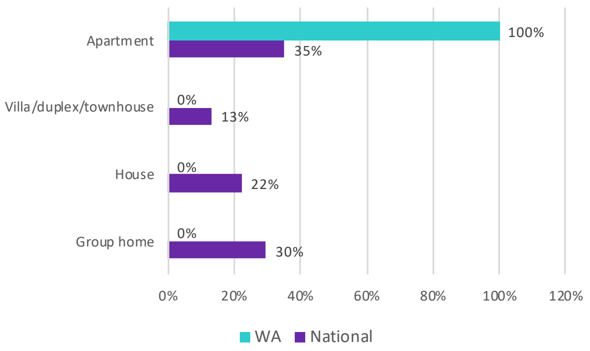


Map 6: Western Australia – New SDA development

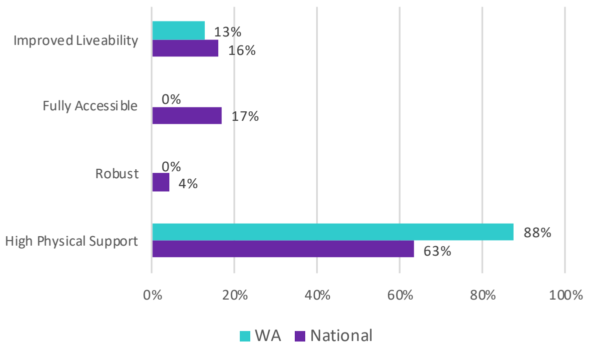
Western Australia overview

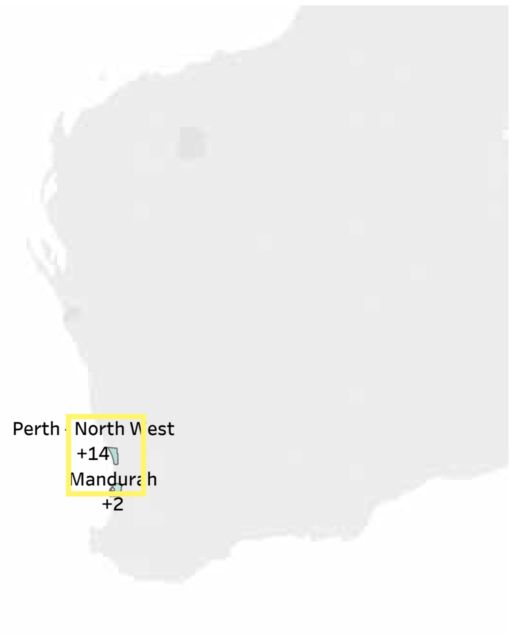
Known new SDA development is occurring north of Perth and in Mandurah.

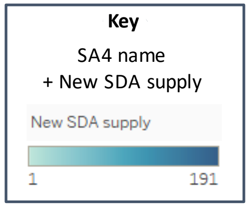
WA – SDA new supply by Building Type

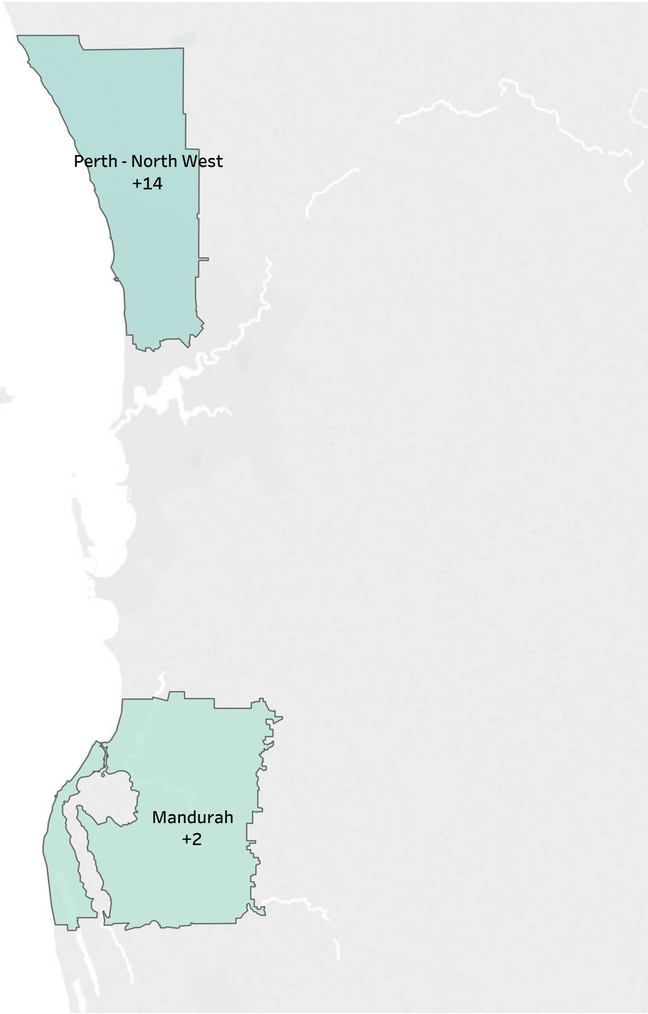


WA – SDA new supply by Design Category





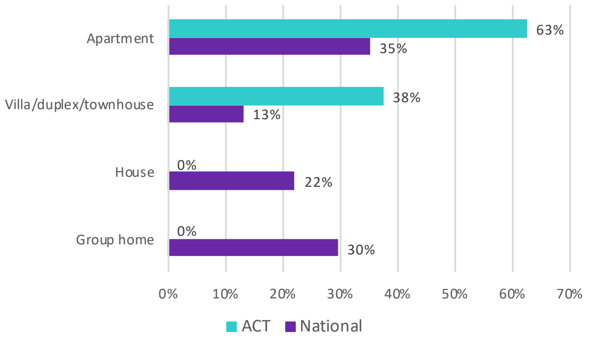




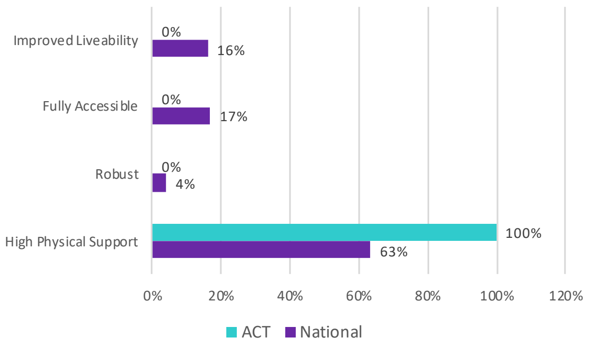
Map 7: ACT and Northern Territory – New SDA development

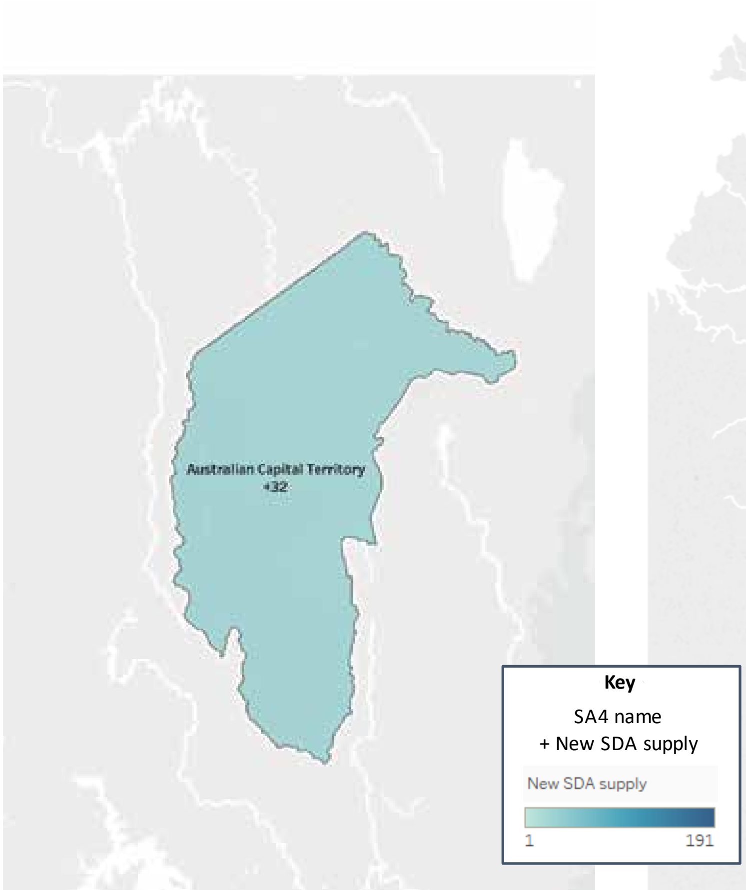
Territories overview

ACT – SDA new supply by Building Type



ACT – SDA new supply by Design Category





Modelling SDA undersupply

In the 2018 report *Specialist Disability Accommodation Market Insights*, modelled supply of existing SDA (based on the number of people receiving disability accommodation services under the pre-NDIS system) and indication of areas of undersupply was mapped across Australia.

"Undersupply" was modelled in that report using a proxy indicator of SDA supply from pre-NDIS administrative data (refer to Technical Notes, p.41).

At a jurisdiction level, the *Market Insights* report found significant undersupply of SDA places in NSW, Victoria, Queensland and WA. This does not take into account any existing SDA stock which may need to be replaced. The results from this report (summarised in Table 5) indicate that an early start has been made to develop new SDA places, but there is a long way to go to make up the SDA supply shortfall.

Note: The data sources used in Table 5 and the following maps are not based on NDIS SDA data (due to the limitations on availibility). Analysis of enrolled SDA 'new build' supply data available from the NDIA is provided on p.35.

Table 5 – SDA modelled undersupply after existing and new supply

	New SDA Supply*	Existing SDA residents (pre-NDIS)	National distribution of SDA places (per capita)	SDA shortfall (places)**
Australian Capital Territory	32	212	471	227
New South Wales	635	5,738	9,029	2,658
Northern Territory	0	165	286	121
Queensland	99	3,340	5,656	2,217
South Australia	336	1,720	1,998	-59
Tasmania	14	511	603	80
Victoria	386	4,262	7,210	2,559
Western Australia	16	1,580	2,871	1,341
National	**1,518**	**17,528**	**28,124**	**9,144**

*Reported from survey **Takes into account reported new supply

Where is the SDA undersupply?

Introduction to maps

The following maps combine the location of the new SDA supply (drawn from survey results) with the analysis of SDA undersupply published in 2018. The tables following indicate the modelled shortfall based on the Market Insights report, less the new supply from the survey.

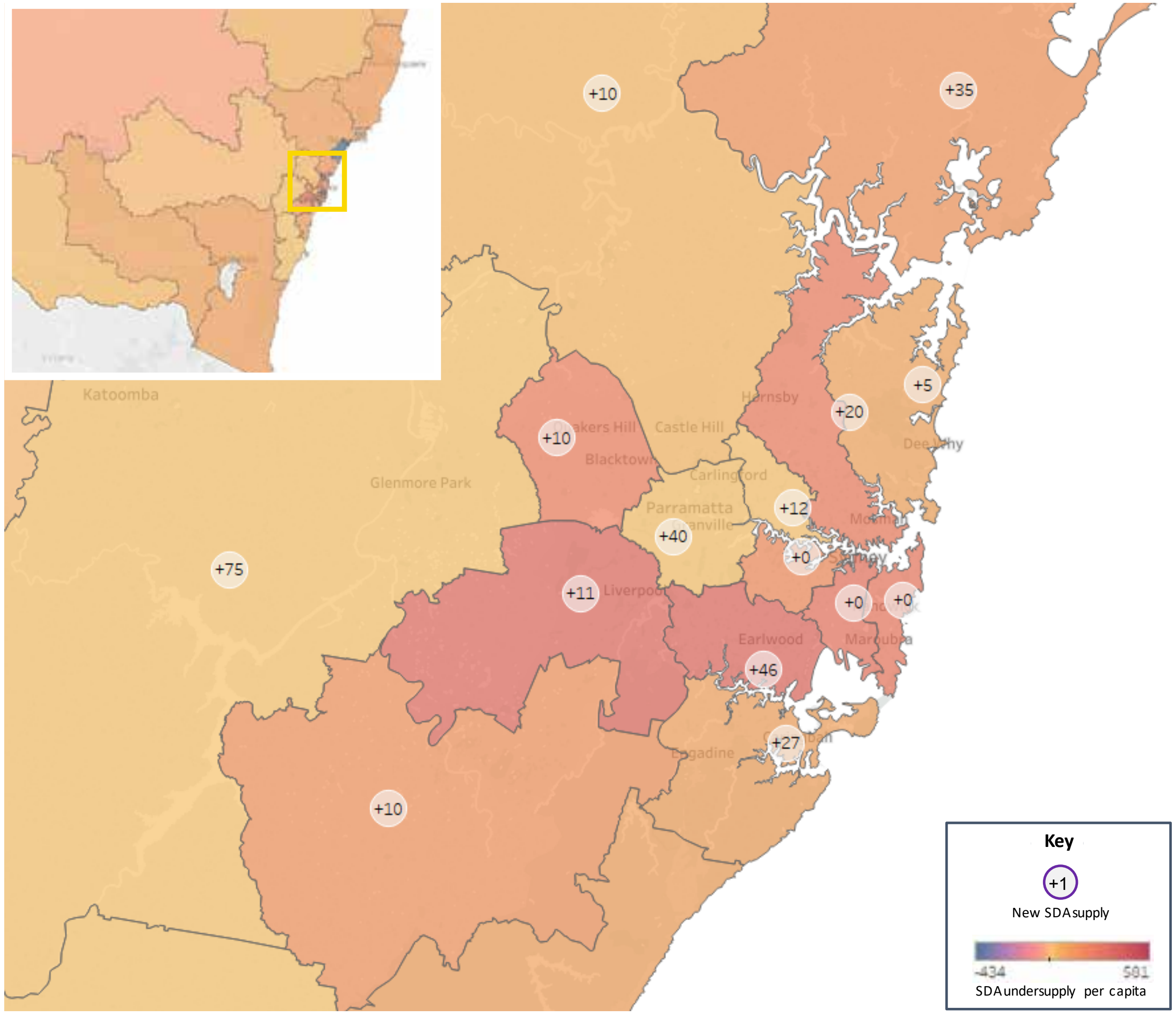
Map 8: New South Wales – SDA undersupply

Highest areas of SDA undersupply

SA4	New SDA supply (places)*	SDA shortfall (places)**
Sydney - Inner South West	46	352
Sydney - South West	11	344
Sydney - City and Inner South	0	291
Sydney - Eastern Suburbs	0	262
Sydney - North Sydney & Hornsby	20	243
NSW	**635**	**2,658**

*Reported from survey

**Takes into account reported new supply



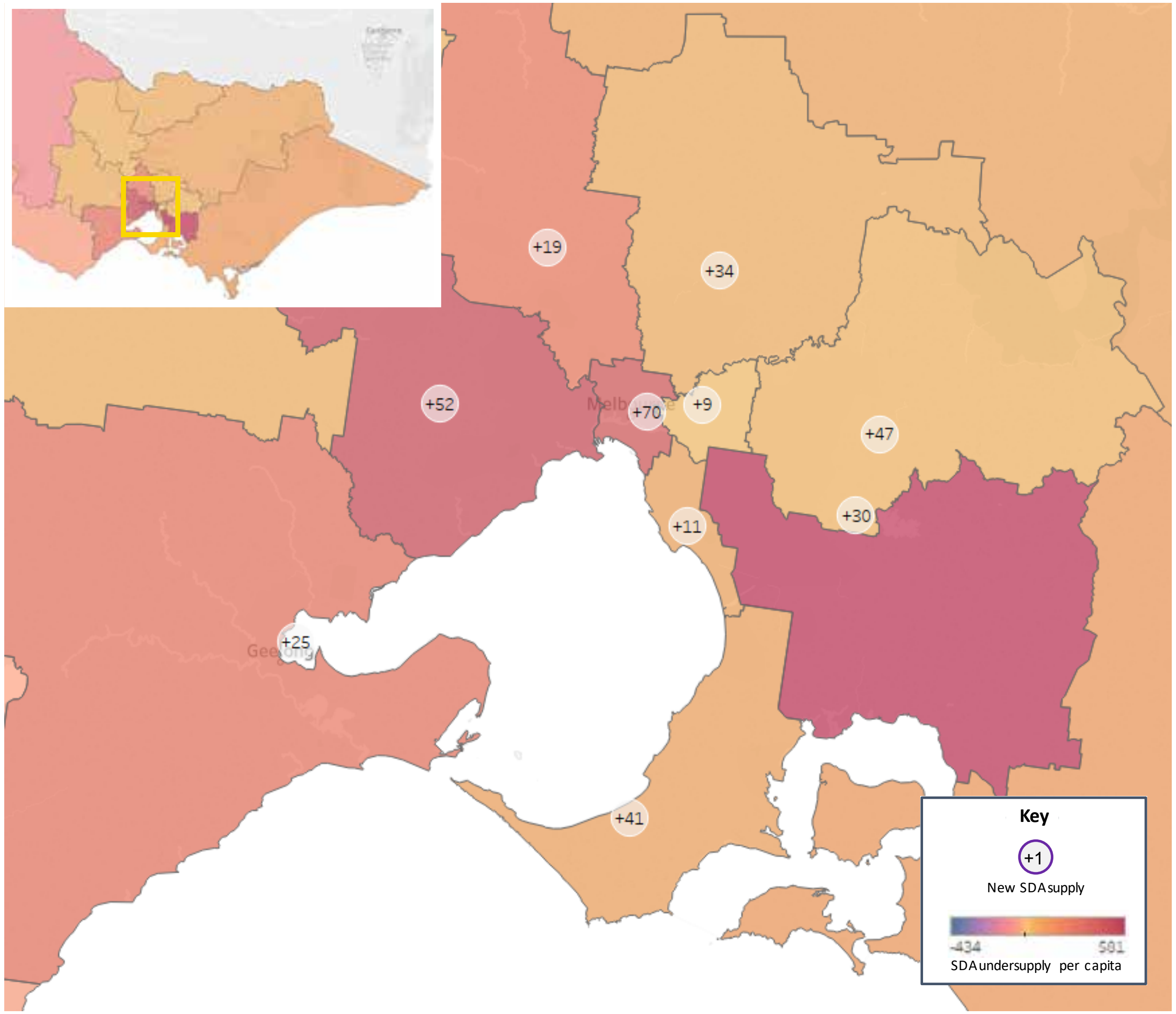
Map 9: Victoria – SDA undersupply

Highest areas of SDA undersupply

SA4	New SDA supply (places)*	SDA shortfall (places)**
Melbourne - South East	30	582
Melbourne - West	52	494
Melbourne - Inner	70	435
Geelong	25	287
Melbourne - North West	19	256
VIC	**386**	**2,559**

*Reported from survey

**Takes into account reported new supply



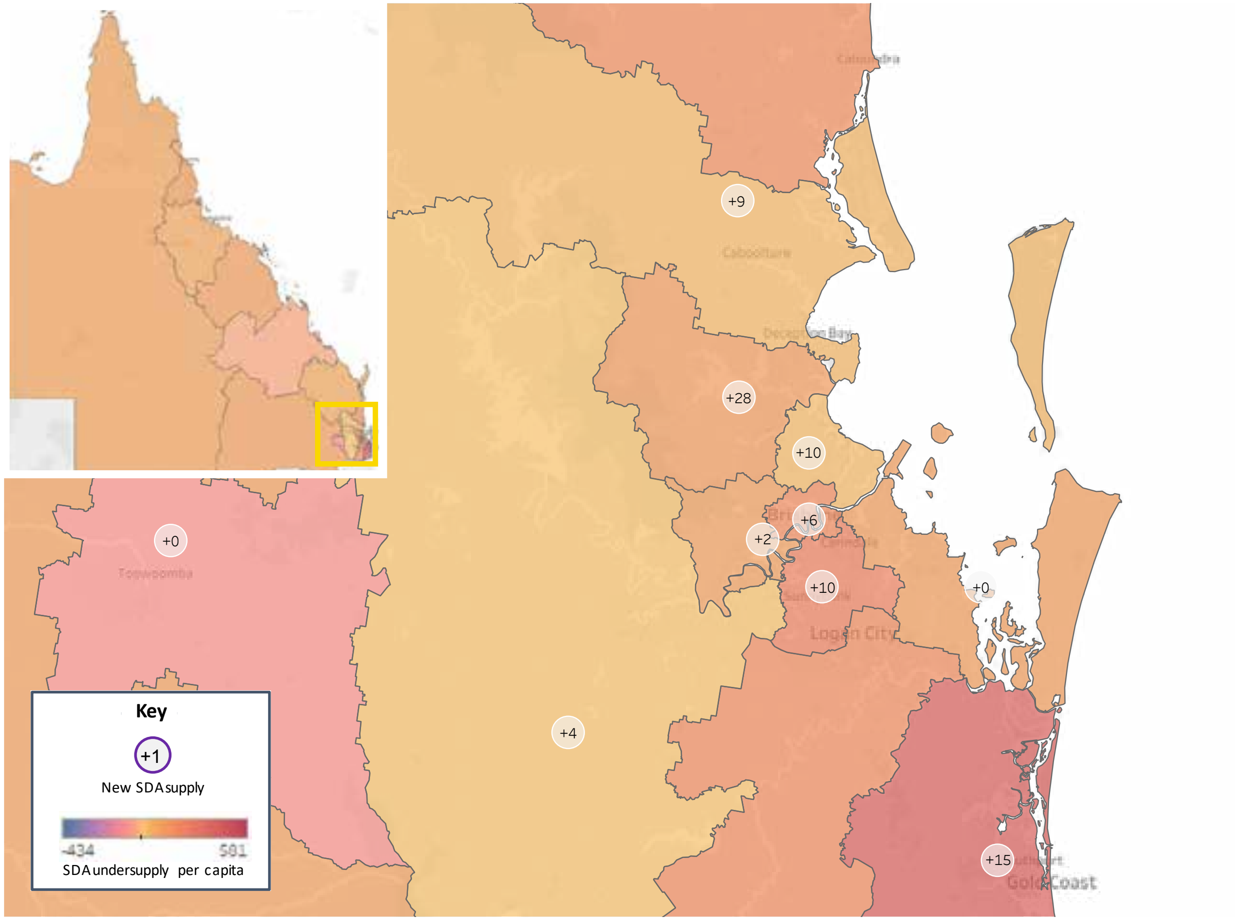
Map 10: Queensland – SDA undersupply

Highest areas of SDA undersupply

SA4	New SDA supply (places)*	SDA shortfall (places)**
Gold Coast	15	399
Brisbane - South	10	233
Brisbane Inner City	6	192
Sunshine Coast	0	191
Logan - Beaudesert	0	188
QLD	**99**	**2,217**

*Reported from survey

**Takes into account reported new supply



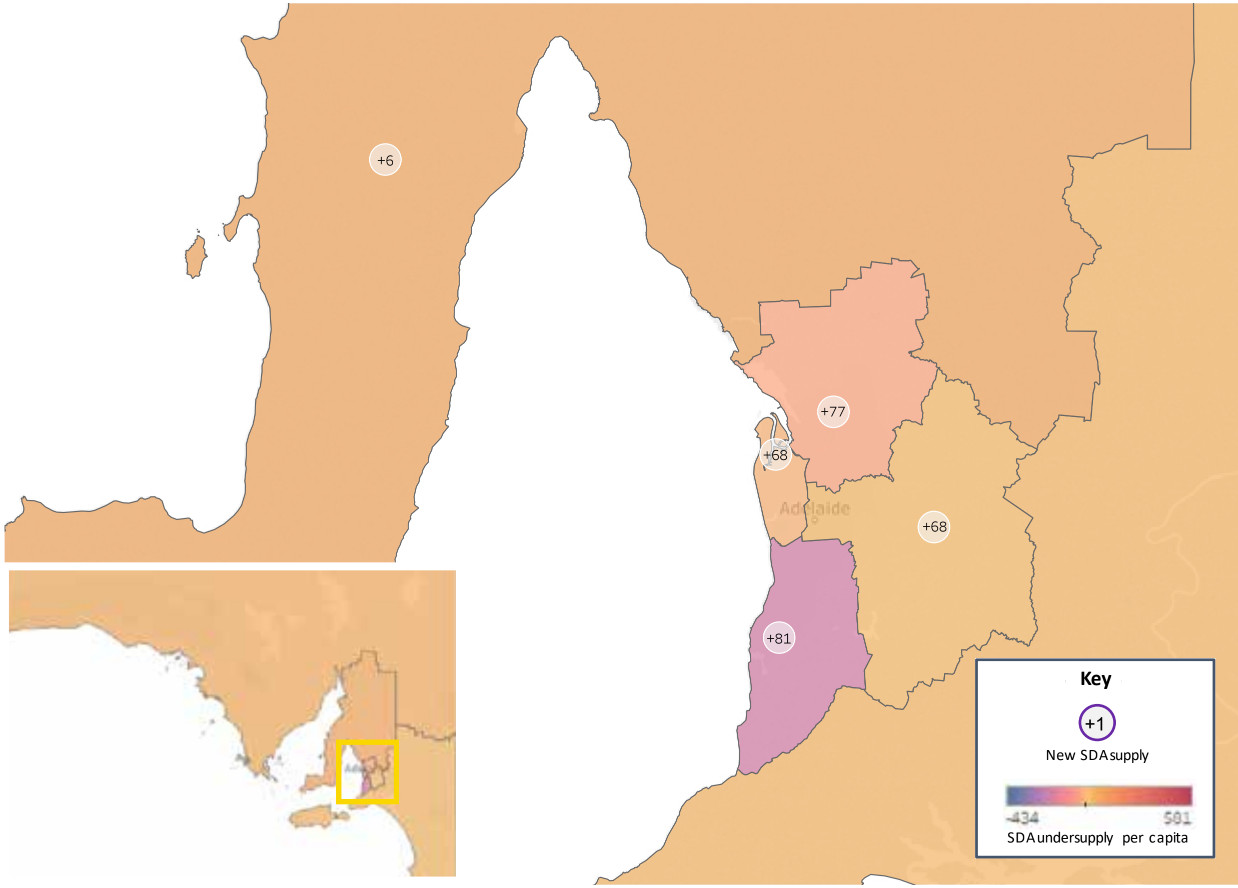
Map 11: South Australia – SDA undersupply

Highest areas of SDA undersupply

SA4	New SDA supply (places)*	SDA shortfall (places)**
Barossa - Yorke - Mid North	6	73
South Australia - Outback	8	54
South Australia - South East	28	35
Adelaide - Central and Hills	68	25
Adelaide - West	68	-16
SA	**336**	**-59**

*Reported from survey

**Takes into account reported new supply



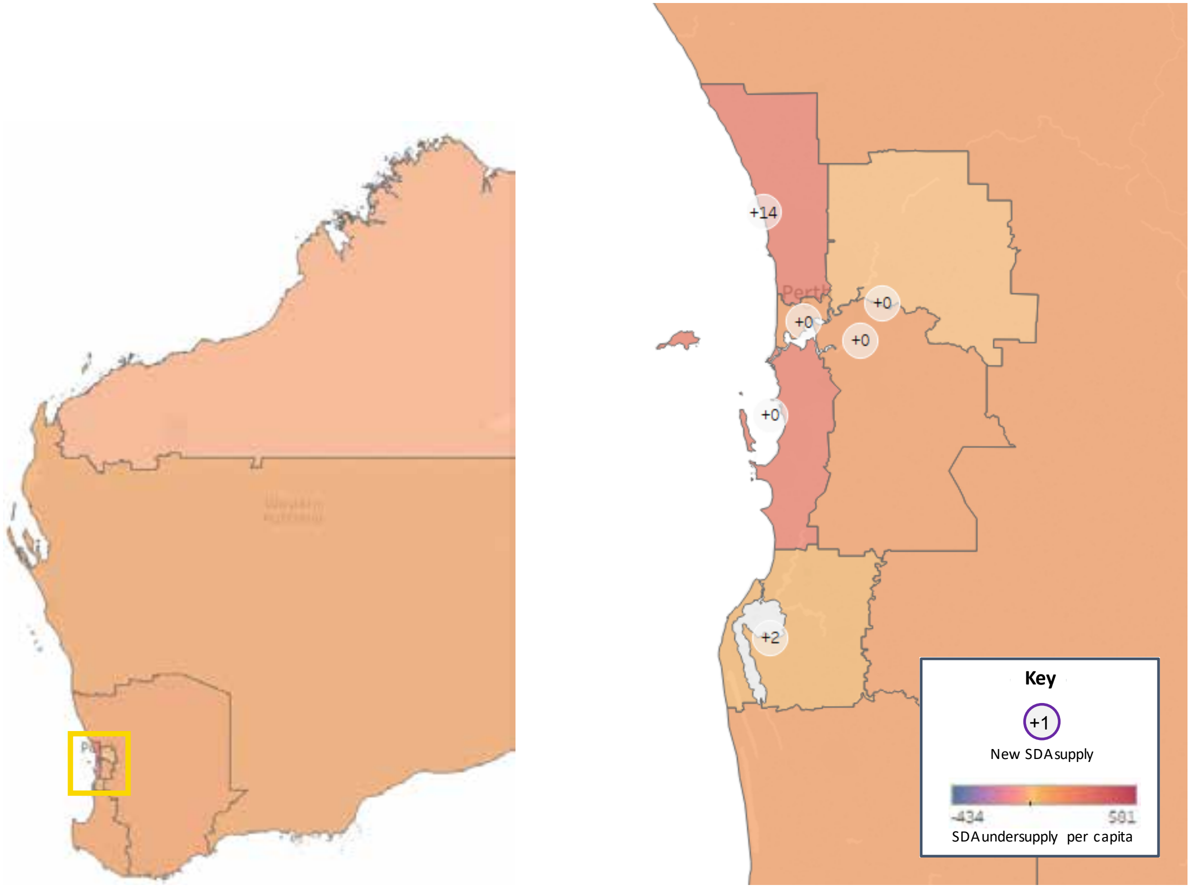
Map 12: Western Australia – SDA undersupply

Highest areas of SDA undersupply

SA4	New SDA supply (places)*	SDA shortfall (places)**
Perth - North West	14	288
Perth - South West	0	279
Perth - South East	0	144
Western Australia - Wheat Belt	0	140
Perth - Inner	0	139
WA	**16**	**1,273**

*Reported from survey

**Takes into account reported new supply



Map 13: ACT and Northern Territory – SDA undersupply

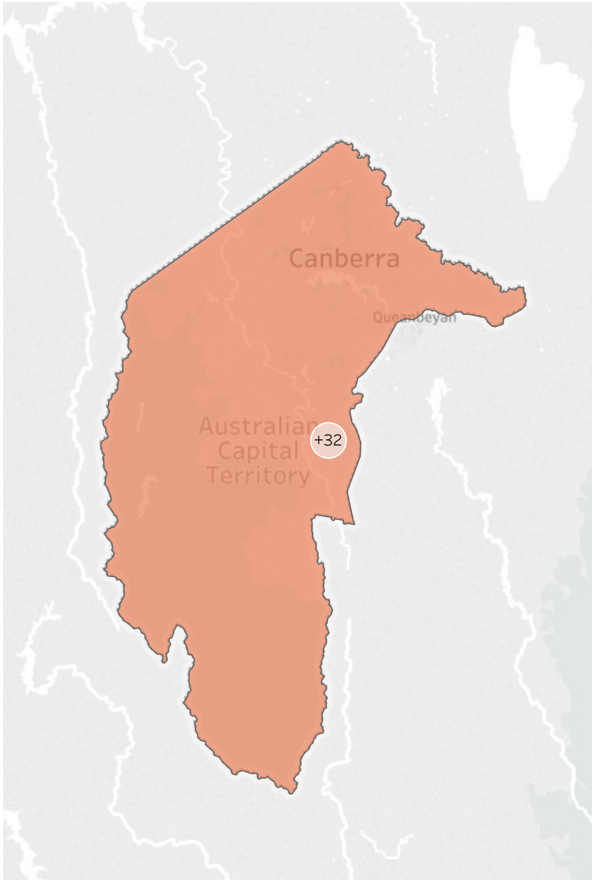
Highest areas of SDA undersupply

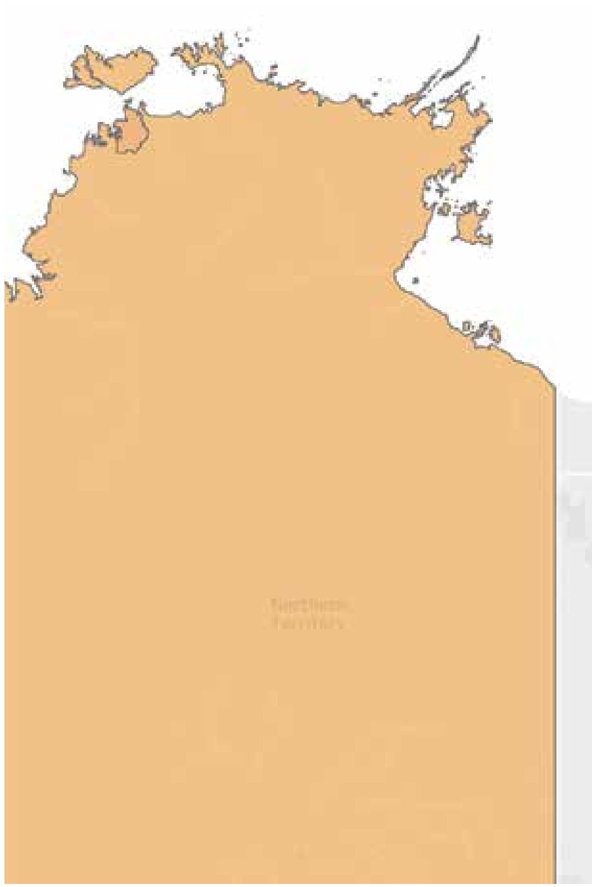
SA4	New SDA supply (places)*	SDA shortfall (places)**
ACT	**32**	**227**

SA4	New SDA supply (places)*	SDA shortfall (places)**
Darwin	0	79
Northern Territory - Outback	0	42
NT	**0**	**121**

*Reported from survey

**Takes into account reported new supply





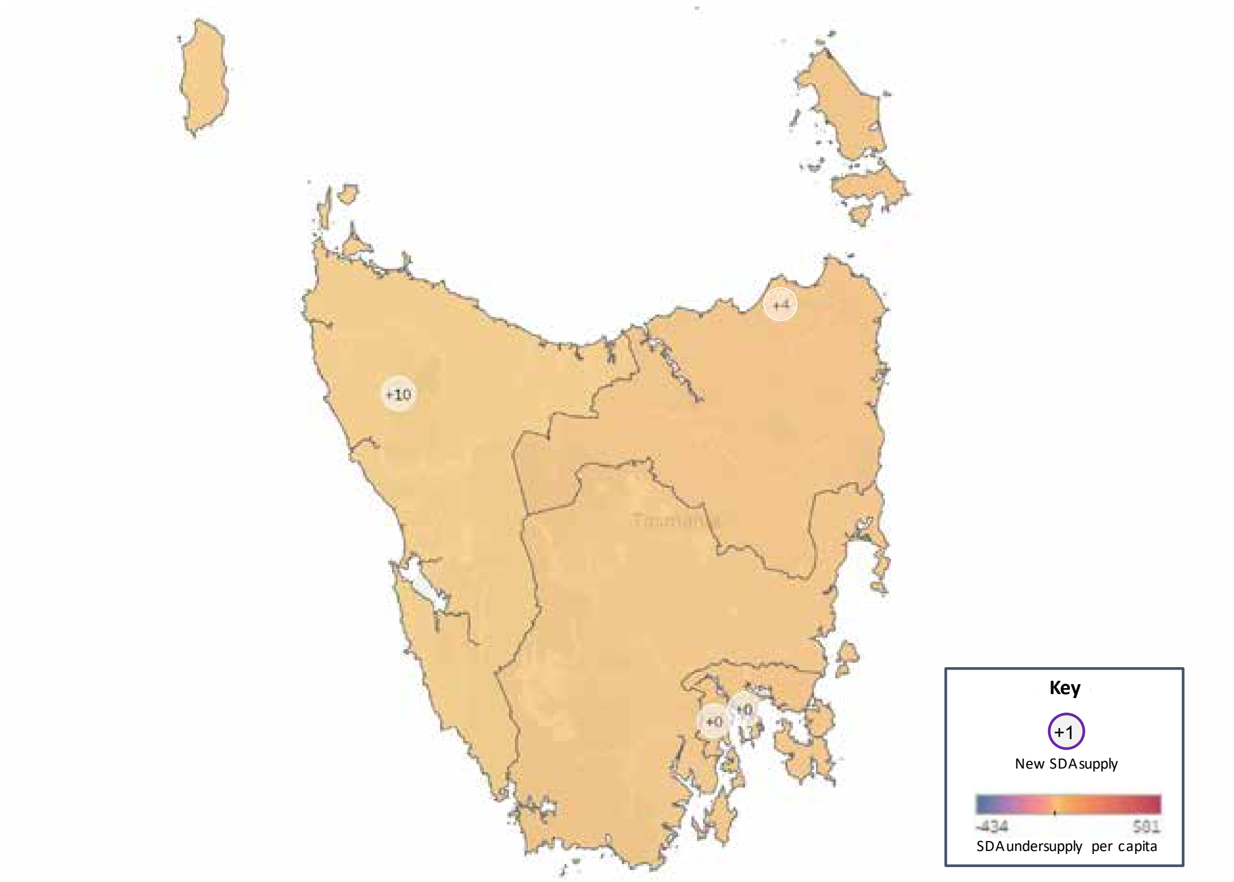
Map 14: Tasmania – SDA undersupply

Highest areas of SDA undersupply

SA4	New SDA supply (places)*	SDA shortfall (places)**
Launceston and North East	4	31
Hobart	0	29
South East	0	21
West and North West	10	-1
Tasmania	**14**	**80**

*Reported from survey

**Takes into account reported new supply



Kirby’s story

Kirby was a teacher working with special needs children. At 25 she bought her first home.

A stroke after surgery for a brain tumour when she was 28 changed everything. She was left paralysed and had to move into aged care to access rehabilitation.

She lived in aged care for a year before moving back to live with her mum and dad. Over the next two years the family worked towards Kirby’s eventual move in 2018 to her own unit – an SDA high physical support category build that she purchased from an SDA developer. The unit is one of four in a development in regional Victoria.

“I wouldn’t have been able to move out and in to my own unit without the SDA funding in my NDIS plan,” Kirby said.

“I got in at the planning stage of the units. Being involved with the developer was good. He was understanding and I made choices about the way I wanted my unit - like blinds I can operate myself, and tiles and flooring – to make it more my own.”

Independent living has brought choice and control back into Kirby’s life.

“I felt a big change coming through the doors, a sense of freedom,” she said. “It felt like when I used to live on my own before.

“It feels good to make my own choices. I have my own space and I can choose what I want to do and when I want to do it. It’s just the normal things I wanted.”

Having ticked off her goal of moving in to a home of her own, Kirby now has her sights set on a return to school and study.

SDA provider profiles

The following four SDA providers, profiled with one of their current projects, are among the many providers who responded to this survey. These profiles provide some of the stories behind the early new SDA projects. They represent a range of not-for-profit providers – some well-established, some new – developing a variety of SDA housing. Two of the projects are representative of SDA projects currently in the development pipeline that started their early stages of development prior to the SDA Pricing and Payments Framework being introduced in 2016. Three of the projects also highlight the important role of state and local government in providing access to well-located sites ideal for SDA developments.

Melba Support Services/Community Housing Limited

Melba Support Services is a disability support and accommodation provider established in in 1972 by a group of parents that wanted to provide services for their children. Melba provides day programs and individual support, runs nine group homes and will soon deliver DHHS services in group homes across Victoria. The majority of people Melba support have complex disability support needs.

Originating in Victoria in 1993, Community Housing Limited (CHL) has spread its operations to South Asia, South-East Asia and South America. CHL currently has a portfolio of more than 9,000 properties under management in Australia across six states including Victoria, New South Wales, Western Australia, South Australia, Queensland and Tasmania.

Melba regularly surveys the people they support, including questions about their satisfaction with current living arrangements. It was clear that some of the people that they supported were not living where they wanted, or with whom they wanted. Melba decided to do something about this, and so the Anderson Street project in Lilydale, Victoria, came to fruition.

The project inception predated the introduction of the SDA Pricing and Payment Framework and is now under construction and due for completion in early 2020.

The project is being undertaken collaboratively with Melba Support Services and Community Housing Ltd (as developer). Community Housing Ltd will be the tenancy manager, and Melba will provide 24/7 on-site support.

The development is in the heart of Lilydale, close to shops, health services and other amenities, and is a 10-minute walk or wheelchair ride to the train station.

The development comprises 15 dwellings, of which 11 are intended for SDA tenancies. The remaining four dwellings will be built to Livable Housing Australia Platinum standard, which will ensure the units are customisable in the future. They will be available as general community housing for people with disability. There is also one dwelling suitable for housing a family.

The land for the project was purchased from the Uniting Church by Melba, with agreement that Melba could use the church building on site to run disability services and programs, but it would still be used for the congregation to come together for church services, weddings and funerals.

The project has funding support from the Victorian Property Fund, Melba Support Services, and Community Housing Ltd.

> **“Regardless of how good our group homes are, people want their independence, they want to live with whom they choose, and we regard this as a human right.”**

Access 2 Place

Access 2 Place Housing (A2P) is a community housing provider in South Australia with a focus on high needs disability housing. A2P aim for their homes to be accessible, affordable, secure and appropriate to the person living in it. They are guided by the understanding that their tenants want to live just like anyone else does – they want an independent life, and to live in a home that allows them to flourish.

A2P's latest SDA development is in Adelaide. The development has 10 dwellings: two 2-bedroom homes, and four 1-bedroom apartments at ground level. These homes all meet the Platinum standard. The upper floor has a further four 1-bedroom apartments.

An additional on-site space, The Hub, provides an opportunity for support providers to stay overnight if the tenants require 24/7 support. If this isn't required, the space can be leased as another two-bedroom home. The purpose of this space has not been determined yet, but tenants of the development are in discussions with the tenant engagement team to decide what they would like to do with it. Tenants look after their own support arrangements, as it minimises risk and helps them support their tenancies.

The project is being funded by A2P through investment from the organisation's reserves and finance from Homestart Finance. The South Australian Government provided the land, following a tender process.

Tenants were sourced through referrals from support providers, transfers from existing Access 2 Place Housing homes, and via the Summer Foundation's website, The Housing Hub.

Support arrangements are left to the choice of tenants. Most tenants on site have a different support provider, and A2P has not had any issues with "traffic" of support providers coming on site.

> **"We don't want to build houses which stand out from the streetscape as 'the disability house'. Our future developments will involve a co-design process to ensure we are building to the needs of the disability community."**

Summer Housing

Summer Housing is a registered SDA provider with a mission to expand the range and scale of diverse housing options for people with disability living in, or at risk of admission to, residential aged care, particularly younger people. Established in 2017, Summer Housing aims not only to provide better lives and promote choice and control for its tenants, but also role model best practice outcomes through providing an open source to all intellectual property.

Summer Housing has recently acquired 11 apartments in the View development in Rockdale, New South Wales - 13km from Sydney CBD. The apartments are peppered throughout the 91-unit private residential development across 11 levels. View features three retail tenancies, a garden terrace situated on the fourth floor, and is within 500 metres of the Rockdale shopping complex.

The apartments are built to meet SDA requirements (including Livable Housing Australia's Platinum level certification). The use of technology and customisable design are a core feature of the Summer Housing model. The View apartments all contain an accessible bedroom, bathroom and kitchen, provision for assistive and communication technology, and have access to 24/7 on-site concierge support services.

These dwellings have been acquired and designed specifically for young people with disability. Priority is given to young people with high support needs who are living in an aged care facility or are at risk of entering aged care. The shared support model allows tenants to jointly select one Supported Independent Living provider to provide 24-hour back up assistance as and when required. Their daily one-to-one supports are provided by their own chosen support provider.

An institutional social infrastructure investor has financed Summer Housing's View apartments. Summer Housing has acquired the 10+1 apartments and will receive a financial return to service third party debt funding, comprising the tenants' rent contribution (which, under SDA requirements, is capped at 25% of the disability support pension, plus Commonwealth Rent Assistance) and SDA payments from the NDIS.

Tenants will be sourced and matched to the development with the assistance of the Summer Foundation, who have been engaged to undertake the tenancy matching services for the project.

"Summer Housing's vision is to see all people with disability and complex care needs have the opportunity to live in high quality housing that enables them to live as independently as possible, enhancing their health, wellbeing and participation in the community."

View Apartments, Rockdale

Youngcare

Youngcare is a not for profit organisation that has been fighting for independence, dignity and choice for young people with high physical care needs for 14 years. Youngcare believes that the SDA market will allow young people with high care needs to have genuine choice and control over their living situation.

Youngcare has a strong interest in the SDA market with new SDA projects beginning construction this year in Queensland and NSW, housing up to 28 people, and more projects are to follow.

One of Youngcare's current projects is an integrated development in North Lakes, north of Brisbane. The SDA development will comprise seven 2-bedroom apartments close to the central hub of North Lakes. Public transport is accessible, as is medical and rehabilitation services, shopping centres and entertainment. The project includes space for on-site support services.

The project has been designed to integrate and engage with the local community. For example, there is a retail component which links to an adjacent retail centre, providing opportunity for wider community engagement with the development.

The project is being developed in partnership with a private developer. Youngcare has been able to access the development site at a discounted price through the local council, but the remainder of the project costs will be largely commercially financed.

In partnership with the local council, Youngcare has identified 200 young people with high care needs living in institutionalised housing in the immediate region alone. Youngcare will also identify potential tenants' need through an Expression of Interest register, references from service providers and allied health providers, and through a close relationship with regional hospitals. These connections with potential demand enable Youngcare to gauge the nature and extent of demand across planned projects to respond to demonstrated need for SDA High Physical Support housing.

Youngcare will be the tenancy manager for the housing, once completed.

In this role, Youngcare will also work to promote choice and control for the future tenants ensuring that tenants and their families are involved in the choice of support providers.

Youngcare will also survey and annually audit service provisions to ensure that tenants receive quality services. The NDIS and SDA exist to provide choice and control to young people with high disability support needs and Youngcare will work continuously to ensure that these standards are met.

> **"With too many young Australians being left behind in inappropriate housing, such as aged care, we believe that young people, regardless of their care needs deserve the freedom to choose where they live, who they live with and how they live their lives."**

North Lakes development

Connecting the new SDA market - The Housing Hub

The Housing Hub is a website dedicated to supporting people with disability to find a home they would like to live in (thehousinghub.org.au). At the same time, the website is a place for housing providers to list properties and find suitable tenants. It has been established at a time when the disability sector is undergoing major disruption, where housing for people with disability is transitioning from a state-managed welfare allocation model to a market driven approach with choice and control.

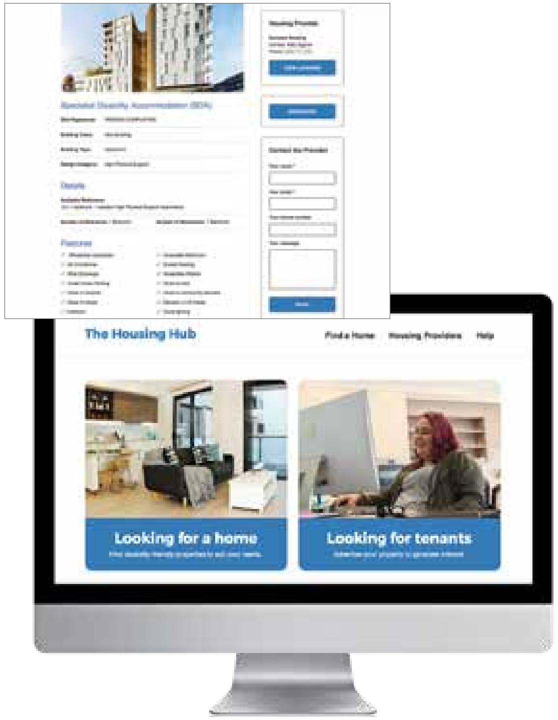
The Housing Hub was developed with the support of Commonwealth Government funding in 2017. The Sector Development Fund provided funding to the Summer Foundation for several projects to support development of the SDA housing market, helping the market to respond to the housing needs of NDIS participants with SDA payments.

One of these projects was the development of an online information platform where people with disability could search for a property, and housing providers could list their properties, and connect people with disability with available housing opportunities.

Since The Housing Hub was launched in late 2017, more than 35,000 people have used the website.

In March 2019 there were more than 350 listings for properties in Victoria, New South Wales, Queensland and South Australia. There are plans to launch The Housing Hub in other states and territories across Australia in 2019. The Housing Hub is transforming the housing search for people with disability.

The Housing Hub is being further developed in 2019 through a co-design process with people with disability, support coordinators, carers and housing providers. A new Housing Hub platform will be launched later in 2019 and will enable people with disability to set up a profile to include key information about their housing search, and match people searching for housing to relevant listings. As the Housing Hub is further developed as a housing search and information platform, the Summer Foundation is growing a community of people around Australia discussing and searching for accessible housing.



New SDA data from the National Disability Insurance Agency

The NDIA has been progressively releasing more data on NDIS participants with SDA approved and the characteristics of SDA enrolled with the NDIA. This data is released four times per annum in the NDIA's Quarterly Reports (https://www.ndis.gov.au/about-us/publications/quarterly-reports).

New Build is a category in the SDA pricing to include only SDA dwellings completed after April 2016 or having undergone significant refurbishment.

NDIA data shows 718 "New Build" places have been enrolled. Figure 9 compares the profile of New Build SDA stock enrolled with the NDIA (a total of 718 places) with data from the SDA future supply survey (a total of 1,518 places in the pipeline).

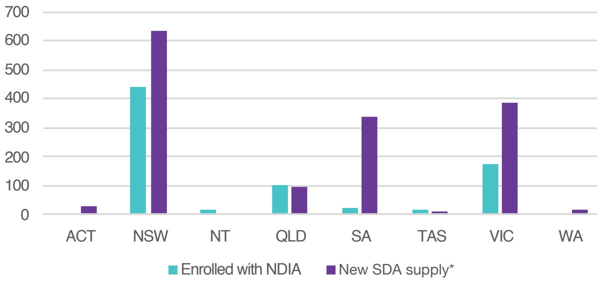
By limiting analysis to New Build SDA stock only, this report allows readers to develop a comprehensive picture of all newly built stock – whether already enrolled with the NDIA or to be enrolled with the NDIA in the future.

Note: there is a degree of overlap between New Build SDA places reported by the NDIA and the survey results, with 53 places reported in the survey as newly enrolled with the NDIA.

Jurisdictional analysis

The SDA New Build enrolments in the NDIA are much higher in NSW than in other jurisdictions, reflecting the early transition of the largest jurisdiction to the NDIS. The majority of the NSW enrolled New Build SDA places are at the two lower levels of accessibility – Improved Liveability (50%) and Fully Accessible (34%).

Figure 9 – New Build SDA enrolled compared with new SDA supply* by jurisdiction



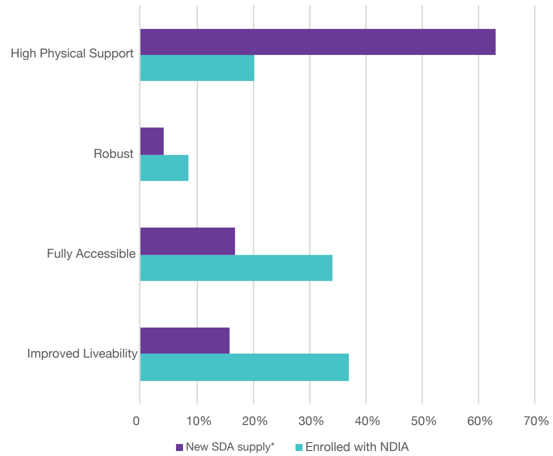
*Reported from survey

Design category

There is a significant difference between the profile of New Build SDA places enrolled in the NDIA compared with the future SDA supply reported through the survey.

While just 20% of New Build SDA stock enrolled with the NDIA is High Physical Support, over 60% of stock in the pipeline is High Physical support.

Figure 10 – New Build SDA enrolled compared with new SDA supply* by Design Category



*Reported from survey

Appendix A: New SDA supply as reported in survey

	Improved Liveability	Fully Accessible	Robust	High Physical Support	Total
NSW	57	90	7	481	635
VIC	20	76	24	266	386
SA	155	75	25	81	336
QLD	8	1	4	86	99
ACT				32	32
WA	2			14	16
TAS		12	2		14
Total	**242**	**254**	**62**	**960**	**1,518**

	Apartment	Villa/ Duplex/ Townhouse	House	Group home	Total
NSW	233	10	16	376	635
VIC	151	87	92	56	386
SA	53	60	223		336
QLD	61	30	3	5	99
ACT	20	12			32
WA	16				16
TAS			2	12	14
Total	**534**	**199**	**336**	**449**	**1,518**

	A	B	C	D	E	Total
NSW	12	48	86	411	78	635
VIC	16	33	167	66	104	386
SA	4	146	135	6	45	336
QLD	17		20	20	42	99
ACT			10	22		32
WA					16	16
TAS	4			8	2	14
Total	**53**	**227**	**418**	**533**	**287**	**1,518**

Legend: Development status

A. Completed after 1 April 2017 and enrolment confirmed with NDIA

B. Construction completed, pending enrolment

C. Under construction

D. Development & building approval completed & contractually committed to build

E. Land secured, waiting for development approval, building approval and/or finance approval

Appendix B: SDA supply and demand – New South Wales

	SA4	New SDA supply*	Existing SDA residents (pre-NDIS)	National distribution of places (per capita)	Difference/shortfall between existing and per capita distribution	Modelled SDA shortfall**
New South Wales		**635**	**5,738**	**9,029**	**3,293**	**2,658**
	Capital Region	15	153	262	108	93
	Central Coast	35	209	391	183	148
	Central West	0	254	246	-8	-8
	Coffs Harbour - Grafton	0	88	162	74	74
	Far West and Orana	10	159	136	-23	-33
	Hunter Valley exc Newcastle	45	176	315	139	94
	Illawarra	5	256	354	98	93
	Mid North Coast	5	129	252	123	118
	Murray	5	111	137	27	22
	New England and North West	26	155	217	62	36
	Newcastle and Lake Macquarie	191	674	432	-242	-433
	Richmond - Tweed	22	161	286	126	104
	Riverina	5	100	186	86	81
	Southern Highlands and Shoalhaven	5	170	176	6	1
	Sydney - Baulkham Hills and Hawkesbury	10	234	274	40	30
	Sydney - Blacktown	10	170	409	238	228
	Sydney - City and Inner South	0	103	393	291	291
	Sydney - Eastern Suburbs	0	71	333	262	262
	Sydney - Inner South West	46	300	698	398	352
	Sydney - Inner West	0	180	360	180	180
	Sydney - North Sydney and Hornsby	20	233	496	263	243
	Sydney - Northern Beaches	5	225	311	86	81
	Sydney - Outer South West	10	151	314	163	153
	Sydney - Outer West and Blue Mountains	75	289	367	78	3
	Sydney - Parramatta	40	497	545	48	8
	Sydney - Ryde	12	210	222	12	0
	Sydney - South West	11	137	492	355	344
	Sydney - Sutherland	27	143	263	120	93

*Reported from survey **Takes into account reported new supply

Appendix C: SDA supply and demand – Queensland

State	SA4	New SDA supply*	Existing SDA residents (pre-NDIS)	National distribution of places (per capita)	Difference/shortfall between existing and per capita distribution	Modelled SDA shortfall**
Queensland		**99**	**3,340**	**5,656**	**2,316**	**2,217**
	Brisbane - East	0	152	270	118	118
	Brisbane - North	10	211	250	39	29
	Brisbane - South	10	173	416	243	233
	Brisbane - West	2	106	218	112	110
	Brisbane Inner City	6	111	309	198	192
	Cairns	0	172	289	117	117
	Central Queensland	0	155	264	109	109
	Darling Downs - Maranoa	1	44	150	106	105
	Gold Coast	15	276	690	414	399
	Ipswich	4	380	389	10	6
	Logan - Beaudesert	0	194	383	188	188
	Mackay - Isaac - Whitsunday	0	89	203	114	114
	Moreton Bay - North	9	243	283	40	31
	Moreton Bay - South	28	80	235	155	127
	Queensland - Outback	0	9	96	88	88
	Sunshine Coast	0	226	417	191	191
	Toowoomba	0	255	179	-77	-77
	Townsville	14	194	274	80	66
	Wide Bay	0	270	341	71	71

*Reported from survey **Takes into account reported new supply

Appendix D: SDA supply and demand – Victoria and WA

	SA4	New SDA supply*	Existing SDA residents (pre-NDIS)	National distribution of places (per capita)	Difference/shortfall between existing and per capita distribution	Modelled SDA shortfall**
Victoria		**386**	**4,262**	**7,210**	**2,945**	**2,559**
	Ballarat	0	144	186	42	42
	Bendigo	7	141	181	39	32
	Geelong	25	21	333	312	287
	Hume	0	127	200	73	73
	Latrobe - Gippsland	0	195	320	125	125
	Melbourne - Inner	70	237	742	505	435
	Melbourne - Inner East	9	436	444	7	-2
	Melbourne - Inner South	11	409	497	88	77
	Melbourne - North East	34	527	607	80	46
	Melbourne - North West	19	171	446	275	256
	Melbourne - Outer East	47	530	608	77	30
	Melbourne - South East	30	314	926	612	582
	Melbourne - West	52	348	894	546	494
	Mornington Peninsula	41	219	350	131	90
	North West	26	251	177	-74	-100
	Shepparton	6	102	154	52	46
	Warrnambool and South West	9	90	145	55	46
Western Australia		**16**	**1,582**	**2,985**	**1401**	**1,341**
	Bunbury	0	75	210	135	135
	Mandurah	2	63	116	53	51
	Perth - Inner	0	69	209	139	139
	Perth - North East	0	316	303	-13	-13
	Perth - North West	14	348	651	302	288
	Perth - South East	0	447	591	144	144
	Perth - South West	0	211	490	279	279
	Western Australia - Outback (North)	0	2	114	112	84
	Western Australia - Outback (South)	0	31	141	110	94
	Western Australia - Wheat Belt	0	20	160	140	140

*Reported from survey **Takes into account reported new supply

Appendix E: SDA supply and demand – ACT, NT, SA and Tasmania

State	SA4	New SDA supply*	Existing SDA residents (pre-NDIS)	National distribution of places (per capita)	Difference/shortfall between existing and per capita distribution	Modelled SDA shortfall**
Australian Capital Territory		**32**	**212**	**471**	**259**	**227**
Northern Territory		**0**	**165**	**286**	**121**	**121**
	Darwin	0	91	170	79	79
	Northern Territory - Outback	0	74	116	42	42
South Australia		**336**	**1,720**	**1,998**	**277**	**-59**
	Adelaide - Central and Hills	68	254	347	93	25
	Adelaide - North	77	457	503	45	-32
	Adelaide - South	81	540	423	-117	-198
	Adelaide - West	68	220	272	52	-16
	Barossa - Yorke - Mid North	6	53	132	79	73
	South Australia - Outback	8	38	100	62	54
	South Australia - South East	28	158	221	63	35
Tasmania		**14**	**511**	**603**	**94**	**80**
	Hobart	0	233	262	29	29
	Launceston and North East	4	133	167	35	31
	South East	0	24	44	21	21
	West and North West	10	121	130	9	-1

*Reported from survey **Takes into account reported new supply

Technical Notes

1. Survey data used in this report is from data reported by 55 organisations with SDA development projects at various stages of development or completed and enrolled with the NDIS since April 2017.
2. The organisations who responded to the survey do not represent all organisations undertaking SDA development at this time. The survey was voluntary and some organisations undertaking SDA development projects have chosen not to respond or were not available to respond at that time (data was collected in December 2018 – January 2019). There may be organisations undertaking SDA development who were not identified and therefore not contacted to undertake the survey.
3. All survey data is reported as number of SDA places. This can equate to number of bedrooms in a dwelling but not always, as not all bedrooms in a property may be enrolled as SDA with the NDIA. The number of SDA places in a dwelling can range from 1 to 5.
4. Number of SDA dwellings has not been reported due to inconsistences in data returns between individual providers.
5. New SDA supply maps (pages 13 – 20) indicate the location and number of new SDA supply (number of places) as recorded in the survey (i.e. this is not NDIA enrolled dwelling data). This data is mapped by Statistical Area 4 (SA4). For an explanation of geographies used by the Australian Bureau of Statistics, refer to: www.abs.gov.au/websitedbs/D3310114.nsf/home/Australian+Statistical+Geography+Standard+(ASGS)
6. New SDA supply data from the survey was mapped to SA4 areas based on the suburb of the dwelling, using the ASGS Geographic Correspondences (2016).
7. Tables presented on each map display the percentage of SDA places in that jurisdiction by Building Type and Design Category compared with the national percentages.
8. SDA undersupply maps (pages 21 – 28) use underlying data published in the Specialist Disability Accommodation – Market insights report, released by SGS Economics and Planning and the Summer Foundation in March 2018. "Undersupply" of SDA was modelled using a proxy indicator of SDA supply from pre-NDIS administrative data (Disability Services National Minimum Data Set).
9. Undersupply was determined by estimating the number of pre-NDIS disability service users living in accommodation services and the number of additional SDA places an area would need, assuming that all SDA funded by the NDIS is distributed by population (per capita). The difference between "existing" and "per capita" distribution of all funded SDA places indicated locations where there is a theoretical undersupply of SDA.
10. For the SDA undersupply maps, the modelled data is combined with the recent survey data to present the relative undersupply of SDA places, mapped by SA4, and taking account of new SDA supply reported through the survey.
11. New build SDA data reported on page 35 was provided by the NDIA. This data comprises new build places combined with new build (refurbished) places enrolled with the NDIS as at 31 December 2018. There is a small overlap of 53 places which were reported as newly enrolled as SDA (since) and the new build data provided by the NDIA.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