ESTABLISHING EFFECTIVE SDA PROJECTS

LEARNINGS FROM THE SUMMER FOUNDATION'S HOUSING & SUPPORT DEMONSTRATION PROJECTS

SUMMER FOUNDATION

CITATION GUIDE

Reynolds, A. (2017). *Establishing Effective SDA Projects*. Melbourne: Summer Foundation Ltd

DISCLAIMERS

The Summer Foundation has contributed information towards this report and believes it to be accurate and
reliable. Neither the Summer Foundation nor any contributors make any warranty, expressed or implied, regarding
any information, including warranties to accuracy, validity or completeness of information. This guide is for
educational purposes and the Summer Foundation cannot be held responsible for any actions taken on the basis
of information outlined in this guide.

TERMS USED IN THIS DOCUMENT

EOI - Expression of Interest

MOU - Memorandum of Understanding

NDIA - National Disability Insurance Agency

NDIS - National Disability Insurance Scheme

SDA - Specialist Disability Accommodation

CONTENTS

ABOUT THIS REPORT

The Summer Foundation aims to stop young people with disability being forced to live in nursing homes. A major reason why people with disability live in nursing homes is the lack of appropriate housing alternatives, so the Summer Foundation set about developing housing prototypes for people with complex needs.

The Summer Foundation's housing work is primarily aimed at showing that people with complex support needs can live an ordinary life in the community. We have created two housing demonstration projects – in inner-suburban Melbourne (Vic) and in Newcastle (NSW).

There are 6,200 young people in aged care who need housing. We recognise that we will not be able to build the range and scale of accessible housing required to meet this need, so our goal in sharing the knowledge from our housing projects is for others to learn from, replicate and adapt what we have done.

This document shares the practical elements of what is involved in creating housing projects that are suitable for people with complex needs and eligible for Specialist Disability Accommodation (SDA) payments from the National Disability Insurance Scheme (NDIS), as well as the lessons we learnt along the way. We hope that by sharing this experience, evidence and information, we can encourage other organisations to help meet the huge unmet need for accessible housing and work together to resolve the issue of young people in aged care.

The report is structured into three parts:

- **Part 1:** An overview of our housing demonstration projects, including the aims and key considerations
- **Part 2:** Provides practical information about what is needed and how to establish a successful accessible housing project
- **Part 3:** Action research & ongoing learning

More information on the Summer Foundation's work is available on our website www.summerfoundation.org.au, including videos of our housing projects, interviews with tenants and a virtual tour of our apartments.

PART 1:
OVERVIEW OF HOUSING AND SUPPORT DEMONSTRATION PROJECTS

The Summer Foundation has established two housing and support projects to change the thinking in Australia about housing options for people with complex support needs, many of whom end up inappropriately living in residential aged care.

The demonstration projects have a strong focus on supporting the tenants to:

- Live their life with as much autonomy and independence as possible
- Have as much control over their home environment as possible
- Have a home environment that helps maintain family roles and contact with friends and family
- Be connected with others and included in the community

The demonstration projects have a number of key elements:

Located close to services and public transport

Design based on universal design principles and incorporating many accessible and adaptable design features

Use of clever communication systems and smart home technology

A support approach focused on building tenant capability for sustainable independent living

The Summer Foundation established the demonstration projects to continue to develop the understanding of how to effectively support people with complex support needs to live an ordinary life. More details about the demonstration projects can be found at 🌐 **summerfoundation.org.au/housing/**

The introduction of the National Disability Insurance Scheme (NDIS) aims to increase the independence, social and economic participation of people with disabilities. The NDIS provides significant new opportunities for people with complex support needs to receive funding to purchase the range of assistance they need to live with greater independence, including technology, equipment and home modifications. The Summer Foundation demonstration projects are aligned with the aspirations of the NDIS.
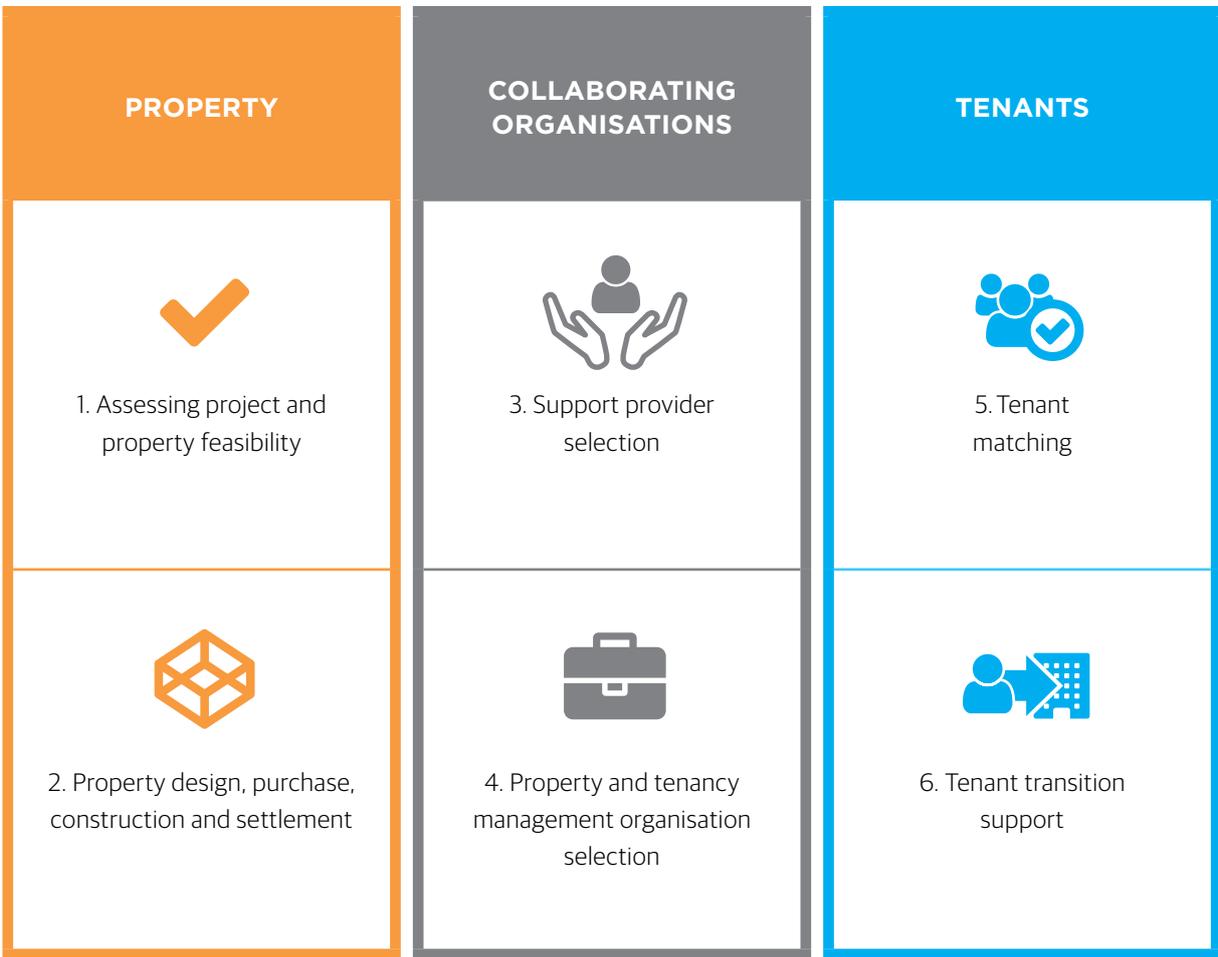
The people selected as tenants for the demonstration projects were previously living in residential aged care, hospital rehabilitation units directly post their significant injury, group homes or with family (after, for example, a catastrophic brain injury).

For people moving to a new home to live more independently is a major life event. It is a time of immense opportunity for a changed future that is both exciting and challenging. In many instances the move is also a major life event for a whole family who have had their relationships and lives severely impacted by traumatic accident, neurological disease or medical crisis that has resulted in significant disability for one of their close family members.

STAGES OF THE DEMONSTRATION PROJECTS

The demonstration projects had many aspects that needed to be brought together to support planning, establishment and ongoing operations.

The establishment of a project involves six components shown below and explored in more detail in Part 2:

PROPERTY	COLLABORATING ORGANISATIONS	TENANTS
1. Assessing project and property feasibility	3. Support provider selection	5. Tenant matching
2. Property design, purchase, construction and settlement	4. Property and tenancy management organisation selection	6. Tenant transition support

Following the project's establishment, Summer Foundation's experience is that there is a consolidation phase. This lasts for two to three years to test the robustness of the model and identify vulnerabilities that need to be addressed to ensure long-term sustainability

It is difficult to set a clear timeframe for the first two stages but, as an example, in the Hunter Project the first two stages took just over three years. There are overlaps in the timing of stages 2, 3 and 4.

The projects had multiple players and were developed and implemented in an ever-changing funding and policy environment. It is not possible to control all aspects of timing or the priority given to the project by other organisations involved. The key to successfully managing this is to:

- Identify as quickly as possible when things are not going to plan
- Work out the possible seriousness and impact
- Identify who needs to be involved in problem solving or discussion, what needs to be done and by whom
- Make any required adjustments to project staging and ensure that everyone who is affected by this is made aware

The projects will need to continue to be seen and supported as demonstration projects for around four to five years after tenants moved in. This will ensure that all aspects have been tested and reviewed and that practices and approaches have been appropriately refined.

Important insights into what is required to create a long-term sustainable model that continues to support good tenant outcomes are most likely to emerge after the project is established. The robustness of the model will be tested with changes in tenants, their circumstances and the support personnel. Only after this time will potential vulnerabilities to continuing success – without the additional supports provided while a demonstration project – will become most evident.

STAKEHOLDERS INVOLVED IN THE SUMMER FOUNDATION'S HOUSING PROJECTS

The Summer Foundation's role in the development of housing projects is facilitator. We do not provide day-to-day assistance to tenants or manage the tenancies. We own the apartments and appoint organisations with local knowledge and expertise to work directly with tenants.
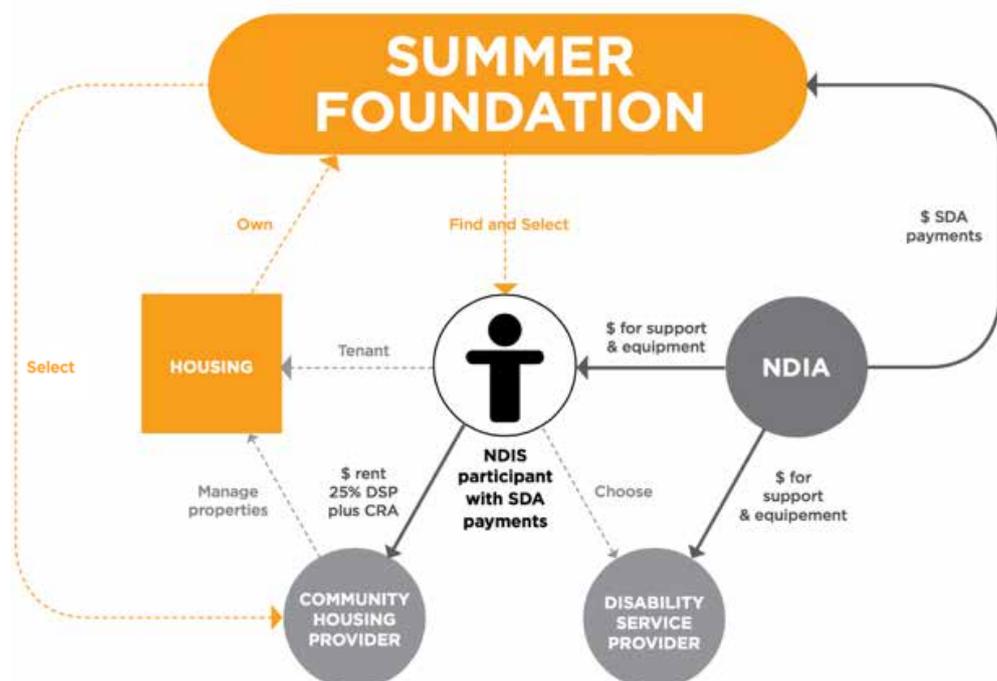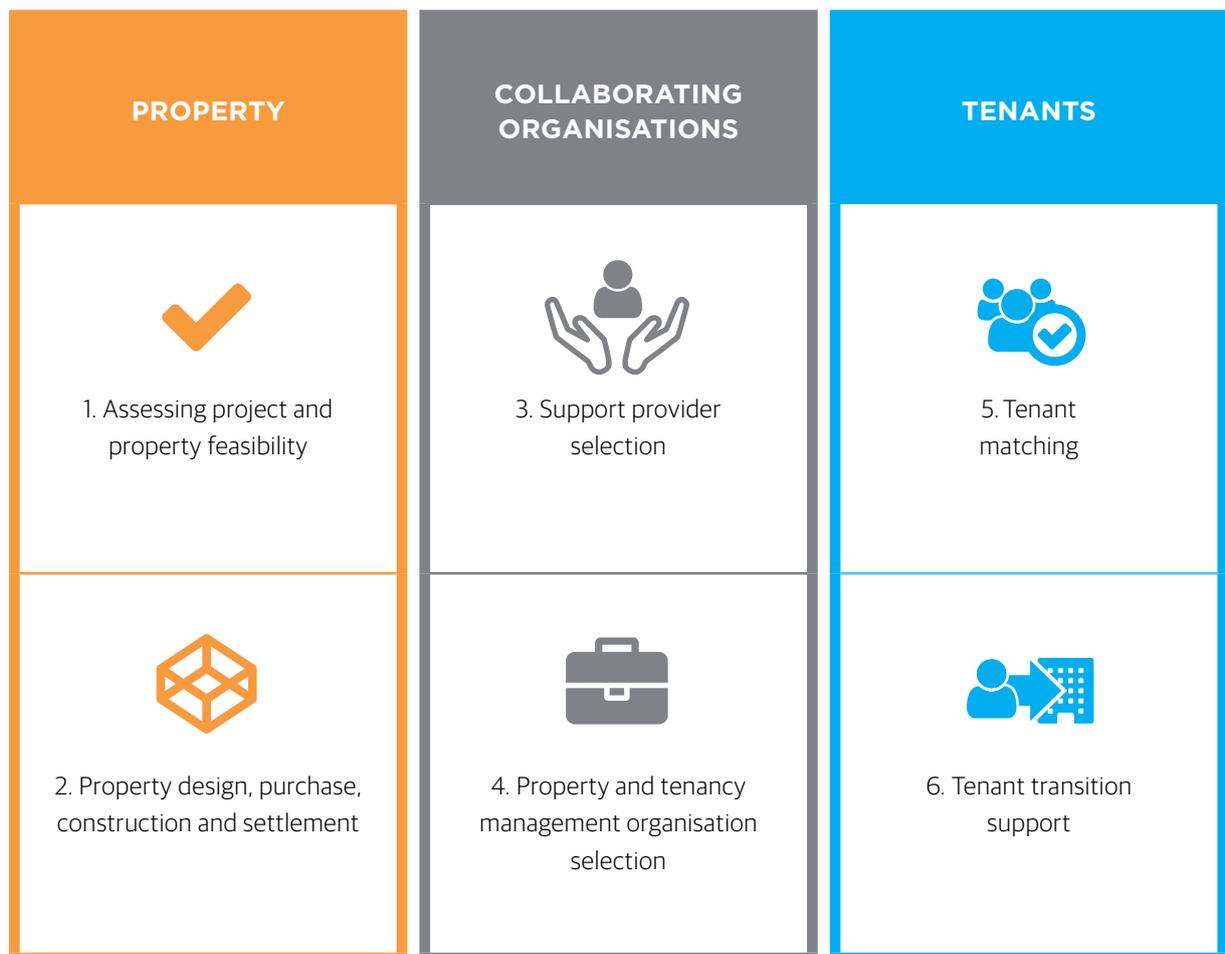
PART 2:
PUTTING THE PROJECT ELEMENTS IN PLACE

Creating a home that effectively supports a person with complex needs is a difficult task. This is why so many young people end up in aged care.

This section outlines the six key elements involved in going from a Specialist Disability Accommodation (SDA) ideal through to tenants moving into the property.

The diagram provides an overview of the various elements associated with establishing an SDA project. Each of these elements is outlined in more detail below.

PUTTING THE PROJECT ELEMENTS IN PLACE

PROPERTY	COLLABORATING ORGANISATIONS	TENANTS
1. Assessing project and property feasibility	3. Support provider selection	5. Tenant matching
2. Property design, purchase, construction and settlement	4. Property and tenancy management organisation selection	6. Tenant transition support

ASSESSING PROJECT AND PROPERTY FEASIBILITY

Doing a detailed analysis of the feasibility of any potential opportunity for an SDA project is essential. Properties should be in a central location, well integrated into an ordinary residential community and designed in line with universal design principles. To ensure viability, there needs to be strong tenant demand, sufficient funding and a capacity to ensure financial sustainability of the project over time.

Having a well thought through framework for assessing the feasibility of a project is key. The Summer Foundation's second housing project in the Hunter in New South Wales built on the knowledge gained from our first project in Abbotsford in Victoria. This identified things to look out for and things to avoid in pursuing the best opportunities to deliver new projects in the quickest timeframe.

In considering a housing project for people with complex support needs some useful background resource documents are:

- NDIS Specialist Disability Accommodation policies
  - SDA Rules
    https://www.legislation.gov.au/Details/F2017L00209
  - Price Guide
    https://www.ndis.gov.au/SDA-pricing-payments.html
  - Terms of Business
    https://www.ndis.gov.au/html/sites/default/files/documents/Provider/TOB.pdf
  - Decision Paper on Pricing and Payments
    https://www.ndis.gov.au/html/sites/default/files/files/SDA/SDA%20Decision%20Paper.pdf

- Designing for Inclusion and Independence. 2017, Summer Housing
  http://summerhousing.org.au/designing-for-inclusion-and-independence/

ASSESSING PROJECT AND PROPERTY FEASIBILITY

KEY ACTIVITIES AND CONSIDERATIONS

ACTIONS/TASKS/ACTIVITIES	CONSIDERATIONS
CRITERIA AND FRAMEWORK	
Determine selection criteria of project site and development context	• Location priorities based on NDIS rollout locations, any insights about potential demand and need, and market opportunity • Proximity to shops, public transport and services • Development context and scale i.e. apartments, mixed multi-density development • Ideal timeframe until anticipated development completion • Ability to meet NDIS and SDA requirements and other relevant legislative requirements
Determine target group, specific household types for project and NDIS SDA design and funding categories	All three factors need to be considered together. One may be identified as the prime factor, for example, NDIS design and funding category – this will then influence the broad characteristics of the target group and potentially household types.
Determine number of units, ideal unit sizes, number of bedrooms and prototype unit layouts	The Summer Foundation's approach was to have 10 units for tenants and one unit as a base for support staff. Ideal unit sizes and layouts are informed by: Universal design principles, Livable Housing Australia guidelines and learnings from other projects.
Prepare general detailed design specifications for the units and common areas of the development	• Specific fire safety suppression and detection system and electrical back-up requirements • Lift and common area door requirements • Specific design, funding or legislative requirements • Technology requirements of the project within units and in common areas
Determine the indicative price range for purchase, criteria for assessing whether the property is a sound longer term investment and any other factors likely to impact the project's financial sustainability	The project needs to be fundable and financially sustainable over time; good financial modelling is required to determine the realistic indicative price range for suitable properties.

KEY ACTIVITIES AND CONSIDERATIONS (CONTINUED)

ACTIONS/TASKS/ACTIVITIES	CONSIDERATIONS
CRITERIA AND FRAMEWORK (CONTINUED)	
Develop a due diligence assessment of the project's developer/builder and the appropriateness of the development's design specifications	Due diligence should include: ● Developer's design specification including common area accessibility, building systems and services and smart technology ● Any design features already included that add value e.g. good accessibility through common areas, including door automation, power back-up system ● Company reputation to deliver projects on time and within budget ● Standard purchase contract conditions ● Approach to developing contractual arrangements for special specifications ● Willingness to provide cost reductions for bulk purchase of units ● Understanding of and expressed commitment to the success of the project ● Capacity to work in a positive, collaborative and solution focused way
Determine funding source/s for: ● **Property purchase** ● **Engagement of staff and consultants**	It is essential to have in place a broad funding strategy for potential projects based on indicative purchase and other project related costs. This needs to identify the likely sources of funding, the likely timing when money will be required and any special conditions associated with funding.
Identify appropriate organisational processes for approval of taking options over properties and property purchase	Timing of projects may be unpredictable and changing. It is important to establish clear authorisation processes for making decisions to proceed with taking a short-term option over properties or to commit to purchase.

KEY ACTIVITIES AND CONSIDERATIONS (CONTINUED)

ACTIONS/TASKS/ACTIVITIES	CONSIDERATIONS
POTENTIAL PROJECT OPPORTUNITIES	
Integrate the criteria developed in the feasibility preparation stage (outlined above) into a systematic feasibility assessment framework	The framework should enable assessment of the suitability of the site and feasibility of project against established criteria for: ● Site suitability ● Suitability of development context ● Suitability for target group and household types determined for project ● Selected NDIS design and funding category ● Property numbers, sizes and unit layouts ● Ability to achieve detailed design specification for units and common areas ● Due diligence of developer/builder capability and project design features ● Price, sound asset investment and longer term financial feasibility ● Financing options, cash flows and timing of payments
Initial screening assessment of any potential sites	An initial screening should assess suitability of location, development context, pricing, NDIS rollout timing and likely demand. If the site is not positively assessed on all these characteristics then it is unlikely to be a suitable site.
Undertake detailed assessment of a potentially suitable project	It may be necessary to assemble a small group of staff/consultants with varied expertise to undertake all elements of the feasibility assessment.
Based on all assessment information decide whether to proceed with the project	It is important to consider all the information about strengths and weaknesses in order to make a final judgement.
Consider taking out an option over properties	It might be necessary to take more time to undertake more detailed assessment and due diligence of possibly suitable units without prejudicing the opportunity to purchase into the project. This was the case in the Hunter project where an option arrangement was put in place.

KEY INSIGHTS

There is no "perfect project" – choosing to proceed with a project is often about weighing up strengths and weaknesses

It is important to clarify which assessment criteria are considered essential, compared to others that may be highly desirable, but not a "deal breaker" if they are not fully met. A final decision on the suitability of a project opportunity is likely to require a judgement based on balancing a set of strengths and weaknesses identified through the assessment process.

Project opportunities do not always come along as planned or with ideal timeframes

The Abbotsford demonstration project was already under construction so decisions to buy into it had to be made quickly with some considerable compromises to ideal criteria and processes. However, the project also provided significant strategic opportunities, which forced a quick decision about committing to buy.

For the Summer Foundation, the decision to participate in the Abbotsford project had major positive impacts on the ability to deliver on strategic organisational objectives and enhance organisational credibility among many important groups e.g. government, NDIA, disability and housing sectors.

With flexible thinking some project challenges can create new opportunities

In the Hunter project, there were no units of the ideal size and shape available. Before our involvement, the plans for individual units had been completed and a number of units had already been sold off the plan. However, the developer was prepared to reconfigure some unit floor sizes and unit footprints for the project.

For example, it was possible to purchase three small one-bedroom units next to each other and convert these to two units to achieve Summer Foundation apartment size and design requirements.

Reconfiguring the design of some units also achieved a better outcome for the developer. Two of these unit reconfigurations achieved large units, which could accommodate three bedrooms, rather than two as in the Summer Foundation specifications. This created an unexpected opportunity to include housing for families into the project.

Design specification – highly accessible and adaptable features required

In most projects the tenants have not been selected when design specifications need to be finalised. So the design has to be highly accessible and adaptable in a cost effective manner to meet the needs of a wide range of tenants.

From the experience with the Abbotsford and Hunter projects it is clear that no matter what accessible design features are included, all tenants with physical disabilities will require some modifications of their environment.

Ensuring the apartment features, including fittings and fixtures, basic whitegoods and any required technology, are able to be fine-tuned to the needs of a tenant is important for supporting the tenant while at the same time being cost effective. Ongoing evaluation of the effectiveness of specific accessible and adaptable design details is important. Building knowledge across successive projects will provide greater insights into the most cost effective balance between investment in the generic accessibility and adaptability design as part of the building contract and the cost of individual modifications.

PROPERTY DESIGN, PURCHASE, CONSTRUCTION AND SETTLEMENT

The developer's property design and approach, as well as the scale of the development company and the builder, will all have significant influence at this stage of the project.

This element of the demonstration projects was the longest of any of the establishment components. The Summer Foundation had little control over when the development would be completed however the completion date is central to when a number of other aspects of the project can start. Timing for the selection of the two collaborating partners, providing core supports and property and tenancy management, needs to be carefully aligned with the timeframe for completion of the development; as do the tenant matching and transition support processes.

For a detailed guide to designing and building housing for people with disability refer to Summer Housing's Designing for Inclusion and Independence Guide: **http://summerhousing.org.au/designing-for-inclusion-and-independence/**

KEY ACTIVITIES AND CONSIDERATIONS

ACTIONS/TASKS/ACTIVITIES	CONSIDERATIONS
After an in-principle decision to proceed with a project is made, identify the steps, timeframes and resources required to begin negotiation with the developer on matters to be resolved before the purchase contract is signed	Many issues will need to be satisfactorily negotiated before being able to commit to signing a contract for the project. It is important to identify which issues are non-negotiable as these become the priority areas to start with.
Negotiate price reductions for bulk purchase of units	There should be some expectation of a discounted purchase price due to the bulk purchase of units. Another option is the developer covering some of the costs associated with common area or building services changes as they will benefit all apartment residents e.g. door automation, power back-up.
Determine the best approach to structuring contract arrangements and what work needs to be completed before signing purchase contracts	In negotiation with the developer, assess the best options for structuring contractual arrangements that reasonably protect the interests of both parties. Options include finalising all specifications and their costing before signing purchase contracts or purchasing the basic units and separately negotiating the detailed modifications.

KEY ACTIVITIES AND CONSIDERATIONS (CONTINUED)

ACTIONS/TASKS/ACTIVITIES	CONSIDERATIONS
	The experience in the Hunter project demonstrated that the contract structuring solutions negotiated in good faith between the developer and the Summer Foundation to achieve practical workable solutions could be challenged by one or both parties' legal representatives. The contractual arrangements required can be outside the norm and strong legal advice may be required.
Establish processes for regular meetings and site inspections with developer/builder across the construction phase	These processes should include: ● Updates on progress ● Identification of any challenges being experienced and actions for their resolution ● Notification of changes to general building plans and specifications ● Site inspections, accompanied by a builder's representative with authority to follow up any issues
Settlement and property handover	Before settlement, detailed and systematic inspections are required of all units and the building to ensure full compliance with specifications. This includes testing all technology in units and common areas. Involvement of a team of relevant consultants (e.g. architects, fire engineer and Livable Housing Australia certifier) can provide important detailed scrutiny. Appointment of the property and tenancy manager before handover of properties enables their involvement in this process. This provides them with a detailed orientation to the property and contributes their expertise to the defects assessment process.
Inspection before end of building defects and product warranty periods	On settlement, when the end of the defects and warranty periods becomes clear, it is critical to establish a process for rigorous assessment. The project's property and tenancy manager should have a major role in the assessments. Assessments will require arranging for timely access to all tenanted apartments as well as making sure all features in untenanted apartments are reviewed and tested multiple times before the deadline date.

KEY INSIGHTS

Ongoing need to test most effective contractual and pricing approaches for incorporation of design and technology requirements

To meet accessibility requirements a number of changes and additions of extra features to the off the plan unit designs will be necessary. Adjustments are also usually required to the developer's common area and building services specifications.

Finalising the specifications for units, common area design and building services in a particular apartment development is a complex and intensive process requiring the involvement of many of the developer's specialist consultants (e.g. architects, fire and mechanical engineering).

Two options are:

- Completing all consultations and negotiations to finalise specifications and developer costing of these before signing a contract so that full costs are clear at the time of purchase. This was the approach in the Hunter project.

- Signing a purchase contract for the off the plan units as they are, with agreed terms in the contract for finalising project specifications and final pricing of these separately before construction.

Need for periodic review of specifications to ensure they remain appropriate

Final specifications are developed based on the best insights at that time about what is required and what is possible. Given the likely lead times (one to two years) on projects there may be important new insights from tenant feedback in other projects, formal evaluations and current asset and product reviews. New improved products, cheaper products or new technology may also become available.

Given the focus on reflective learning in housing projects, as well as changes in products, ongoing review is important. If an area for significant improvement or cost saving is identified after specifications are finalised, a judgement needs to be made whether a variation is required.

Challenges with the delivery of the technology requirements

Achieving the desired and anticipated outcomes from the technology was a challenge in the demonstration projects. Technology specifications need to be outcome based. As the installation, programming and testing of technology is usually only possible in the final stages of the building program any problems may not become apparent until late in the building process. The satisfactory functioning of the technology is usually not required for the issuing of the building's occupancy certificate so is not a high priority for the developer/ builder at the end of construction.

Experience indicates that in order to ensure the technology delivers against the documented contractual outcomes any final payments should not be made until all issues have been resolved.

Positive attitude of developer/builder supports better design outcomes

Experience in existing projects has shown that the attitude of the builder/developer is a key factor in being able to effectively find solutions to design and product challenges that arise. The experience in the Hunter project was very positive where the developer/builder found good solutions to issues by being prepared to adjust his original plans to accommodate project needs. For example, five Summer Foundation units required ramping from the street or from the building's internal courtyard to achieve Livable Housing Australia Certification at Platinum level. The need for ramping reduced the space and overall amenity of the courtyards in these units. The developer/builder was prepared to make adjustments to floor levels in a number of areas of the building to remove the need for this ramping. This improved amenity and livability for the units at no additional cost to the Summer Foundation.

SUPPORT PROVIDER SELECTION

Property and tenancy management organisation selection

In each of the demonstration projects, the Summer Foundation relies on two collaborating organisations for the day-to-day provision of the core disability and property related supports to the tenants.

Selecting the organisations to take on such central roles is a significant decision as these two organisations will have a major impact on the tenants' daily living experiences and independence outcomes.

The support provider

The support provider organisation has a very significant influence on the project's operation and tenant outcomes. It has the ongoing direct relationship with tenants and is responsible for arrangements with tenants about the day-to-day supports it will provide.

The support organisation is engaged for its specialist expertise in effectively supporting people with complex needs in an NDIS funding context to enhance their ability to live with as much independence and engagement in community life as possible.

The nature of the relationship with the support organisation needs to be a truly collaborative one formalised through a Memorandum of Understanding (MOU) outlining respective roles, responsibilities and obligations.

In the NDIS SDA framework, the support provider is formally engaged by the NDIS participant.

The property and tenancy manager

The property and tenancy manager is engaged to undertake a number of specific legal obligations on behalf of the owner of the project properties.

The roles of the property and tenancy manager are necessarily more prescribed and more consistent with the industry norm for such roles compared to those for the support provider organisation. However, tenants with complex support needs, more detailed accessible and adaptable design and the technology are all elements that require more specialised responses from the property and tenancy manager than might be required in more standard services and functions.

Resource information for support provider selection and property and tenancy manager selection is available in the Summer Foundation's Separating Housing and Support Services Toolkit:
www.summerfoundation.org.au/resources/separating-housing-and-support-services-toolkit/

SELECTION PROCESS FOR A PROJECT'S SUPPORT PROVIDER AND PROPERTY AND TENANCY MANAGER

ACTIONS/TASKS/ACTIVITIES	CONSIDERATIONS
Determine and document the objectives and key components of the project support model	These may continue to evolve.
Determine the criteria to be used for selection of the support provider organisation and the property and tenancy manager	It is critical to assess the technical capability and expertise of the organisations being considered.
Develop initial draft structures for legal agreements with the selected organisations	The Summer Foundation developed legal agreements for the Hunter project.
Determine who will be responsible for managing and resourcing the EOI process	The process needs to be managed efficiently and professionally.
Determine the approach for selecting the support provider and property and tenancy manager	- Who will have the opportunity to apply - How will the EOI opportunity be communicated to organisations - How will queries be managed - The timelines and key milestones dates - How shortlisting will be done - Who will be on the interview panel - Who will make the final selection
Develop the EOI documentation for interested organisations	This should provide background information about the project, the nature of the supports to be provided to tenants and selection requirements and processes.
Disseminate the information about the EOI process and respond to queries	Holding a structured briefing session for all interested organisations is one strategy for streamlining the process of managing requests for further information. This proved to be a successful approach in the Hunter project.
Shortlist and interview applicants	Because the selection of the support provider and property and tenancy manager are such significant decisions for the project, a detailed and intensive process for assessing applications and applicant organisations is required.
Notify successful organisations and discuss legal agreements	In-principle agreement needs to be reached between all parties about key terms of the legal agreements. This may involve each organisation's legal representative.
Notify unsuccessful applicants	Most organisations will want to know why they were not successful and how they could improve. Decide how to respond to this type of request before interviews so documentation can be retained to support the feedback.
Develop a joint public announcement strategy	The appointment of key project partners provides an opportunity to have a public joint announcement.

KEY INSIGHTS

Considerations for selecting the project partner organisations

A rigorous process is required to select the two organisations that will become key collaborators in the project. A process that examines the technical capacity and expertise of each organisation is required. In addition, it is essential to establish that the organisations are skilled in being effective collaborative project partners. In the Hunter and Abbotsford projects the broad aspects that proved important to examine as part of the selection process included:

- Technical capacity i.e. do they have demonstrated skills and expertise to deliver the services required in the manner expected

- The philosophical alignment of the organisation with the core objectives of the project

- Experience with, and commitment to, working to achieve better outcomes for people with complex support needs

- Reputation within the local community as a high quality service provider

- Well developed understanding of effective collaborative approaches and evidence of capacity to be a highly effective collaborator in an evolving innovative project with some fuzzy role boundaries

- Commitment at board and CEO level

Ensuring the right timing for appointment of project collaborators

Selection of the project partner organisations can take a number of months. The processes need to be planned to fit in with these timeframes:

Support provider: For smooth implementation of the overall project it is evident that the support provider appointment needs to be finalised well ahead of the project completion. This allows the support provider to manage a transition process for tenants and recruit staff.

There are two potential options for the timing of support provider appointment:

- Appointment before tenants are selected. In the Hunter project Summer Foundation appointed the support provider which means that the provider needed to be appointed no later than the end of the first initial screening of tenants (see following section on tenant matching process). This is so tenants who move on to more detailed eligibility assessment can be told who the support provider will be. Having this information is important in confirming a tenant's ongoing interest in being considered for the project.

- Appointed after tenants are selected. Where tenants are involved in the selection of the provider, it is necessary that the tenants are confirmed before the provider is selected. This can pose a challenge for tenants who are agreeing to move in, without confirmation of the support provider. However, it offers tenants more engagement and ownership over their support provision.

Property and tenancy manager: This appointment needs to be finalised and the organisation briefed and oriented *before settlement of the properties and property handove*r. The organisation needs to be involved in final property inspections before settlement, aware of all defects issues and processes, and product warranty arrangements.

TENANT MATCHING

Matching of tenants to the property is an intensive aspect of every project. Not every person who might be interested will be eligible and suitable.

NDIS funding for housing and individual tenant supports is critical to the project. NDIS processes, funding, requirements and practices continue to evolve across Australia; also they vary between areas.

KEY ACTIVITIES AND CONSIDERATIONS

ACTIONS/TASKS/ACTIVITIES	CONSIDERATIONS
Confirm the specific target group for the project and detailed tenant eligibility and consideration criteria	This is critical to ensure clarity about eligibility for all involved at the beginning of the matching process. This will ensure that information and expectations are clear and consistent.
Develop documentation and confirm processes to inform prospective tenants about the project and how to register their interest	To achieve a wide reach, consider multiple strategies for disseminating information about the project and availability of the properties, the consideration criteria and application process.
Develop document templates, and finalise systems and processes for detailed assessment and final matching of tenants, including establishing a tenant matching panel	It is important to carefully consider the information that needs to be available to adequately assess an applicant's eligibility and suitability for the project. It has been found helpful to have a matching panel to make the final selection of tenants.
Identify the processes to: ● **Inform applicants about the steps in the matching process** ● **Establish key timeframes for decision making** ● **Provide applicants with updates on any significant changes to processes or timing of decisions**	Consultation with tenants and their families has highlighted they can have high levels of anxiety if they are not informed about steps and timeframes in the decision making process. For example, a number assumed that when timeframes for applications were extended that this meant they were no longer being considered.
Identify resources and personnel needed for an effective tenant matching process	This will include staff resources to manage the tenant matching process, as well as resources to ensure effective web-based and other information and communication dissemination. Engagement of an occupational therapist to do detailed assessments was central to matching processes in the Abbotsford and Hunter projects.
Implement processes for responding to queries about the application and matching process	Clear systems and processes are needed to respond to queries with consistent messages, efficiency, as well as sensitivity.

KEY ACTIVITIES AND CONSIDERATIONS (CONTINUED)

ACTIONS/TASKS/ACTIVITIES	CONSIDERATIONS
Review each application for eligibility and prioritise for follow up to get additional information	To support efficiency and timeliness the application form needs to collect sufficient information to be used as a screening tool for overall eligibility and suitability for the project. Experience suggests that for some applicants it may be necessary to seek clarification on information provided or additional information.
Do a face-to-face interview (preferred) or phone call to screen potentially eligible and suitable applicants	It is important to establish personal contact with these applicants to confirm their application details and their understanding of the nature of the project.
Refer confirmed and potentially suitable applicants for detailed assessment by the occupational therapist	The most efficient approach is to screen all applicants for eligibility before referring any to the occupational therapist.
Indicatively match tenants assessed as eligible and suitable to project units	A project may have units of different sizes or with different features. Before final matching of tenants it is important to understand whether there is more than one potentially suitable tenant for any particular unit.
Final tenants are selected based on detailed documented assessment reports which combine the screening information and the occupational therapist's assessment report	It is helpful for the tenant matching panel to include both those who have been involved in the screening as well as others who have not been part of the process. This provides additional rigour and accountability for final tenant matching.
Notify successful applicants	Meet successful tenants to arrange signing of any required agreements.
Make arrangements for tenants to be introduced to the project's transition coordinator to begin their transition planning process	See next section on transition planning for more details.
Notify unsuccessful applicants	If possible, provide them with information about other housing opportunities in their community that may be available or becoming available.
Review insights developed about unmet housing needs from the tenant matching process to support advocacy and information sharing	The applications and queries generated through the tenant matching process provide many insights about the unmet housing needs of the target group.

KEY INSIGHTS

Careful consideration is required regarding the best time to start the tenant matching process

The shortest possible timeframe makes it easier to manage anxiety of applicants and ongoing queries. The challenge is to finalise the matching processes with sufficient time for appropriate transition planning, NDIS plan reviews, funding approvals and building modifications or technology installations.

Unpredictable levels of interest by potential applicants may require review of process and resourcing

While the steps in the process of tenant matching are clear, the scale of the process is somewhat unpredictable if there is an open application process. There is a considerable difference between properly screening 20 applications compared to 40 applications (close to the number in the Hunter). The information in many applications was not sufficient to determine eligibility clearly and potential suitability was even more difficult to determine in the early phases of screening.

Processes must be responsive to people with complex needs and circumstances

Due to the target group and eligibility criteria, many applicants will have complex needs. The application process needs to take account of the level of complexity of support needs of eligible applicants e.g. limited communication capacity, highly constrained mobility, cognitive issues. A number may also be in precarious living circumstances, which create high levels of anxiety about the process and its timing e.g. intense pressure to leave a rehabilitation unit, with the only potential option available being residential aged care. More time and personal contact are often required compared to similar processes for people with less complex needs.

Finalising applicant matching may need to happen progressively rather than at the one time

From both the Hunter and Abbotsford projects we learnt that it might be better to finalise the matching of tenants in batches, depending on the number of applicants and their suitability for particular apartments.
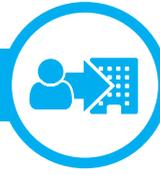
TENANT TRANSITION SUPPORT

The transition process is a critical component of the housing projects. The prospective tenants are usually living in residential aged care, hospital rehabilitation units directly post their significant injury, group homes or with family. For this group of people and their families moving to a new home to live more independently is a major life event that is usually both exciting and challenging.

The objective of the transition process is to ensure that everything is in place for the tenant to have the best chance of a successful and sustainable life in their new home.

To support and resource a successful transition the tenant needs to be an active participant in the process. In the two demonstration projects the prime responsibility for coordinating the transition process rests with the project support provider partner. The transition process is usually 12 months, on average six months pre move and six months post move.

The transition process moves through five stages:

- **Stage 1** – initial engagement with tenant (indicative time: two weeks)
- **Stage 2** – understanding the tenant's goals and desired outcomes for life in their new home (four weeks)
- **Stage 3** – developing a transition plan (two to three weeks)
- **Stage 4** – implementing the transition plan (three to six months)
- **Stage 5** – consolidation of transition (three to four months)

A more detailed document provides further information about the tenant transition process and the roles of all players – *A successful transition to more independent living*. Download this report here: **summerfoundation.org.au/a-successful-transition-to-more-independent-living**

KEY INSIGHTS

Clarity of roles and expectations among all players is critical to effective transition

It is key that there is clarity in the roles and expectations of all organisations involved in the project. Experience in the Hunter project highlighted that it is also important for the opportunity to modify arrangements through mutual discussion when improved approaches may be achieved or solutions to short-term challenges may be required.

Challenges in working in an environment with evolving and changing NDIS planning, funding and administrative processes

One of the key aspects of supporting a successful transition is for tenants to have appropriate goals related to their transition phase and living in their new home. They also need sufficient funding in their NDIS plan for adequate transition support, capacity building, required modifications, equipment and technology and ongoing support. Transition planning can be compromised when NDIS and good practice approaches are not fully aligned. The demonstration projects are providing important insights about what is required to achieve good long-term outcomes for people with complex support needs.

Co-ordinating customisation of unit features for individual tenants

The project apartments have been specifically designed to be consistent with universal design principles, are fully accessible with a number of adaptable features and have capacity for cost effective installation of home automation technology and a range of equipment. After the occupational therapy assessment – done as part of the tenant transition process – most tenants need installation of home automation technology and/or some fine-tuning of bathroom and kitchen features to support them being as independent as possible.

The experience in the Hunter project found that achieving efficient processes for seeking quotations for this work, obtaining NDIS funding approval, co-ordinating the work, ensuring good quality control and timely completion of work was challenging.

PART 3:
ACTION RESEARCH & ONGOING LEARNING

The landscape of housing for people with disability is rapidly changing as the NDIS disrupts traditional forms of shared and congregate housing. Ongoing learning, adapting and change will be a key feature of housing models over the coming decades as providers and people with disability respond to these new opportunities.

Reflective practice and action research is an integral part of the demonstration projects as is sharing the knowledge generated by the projects. This has been a core underpinning in Summer Foundation's housing and support demonstration projects which aim to test and demonstrate a new housing option for people with more complex support needs.

ENCOURAGING AND SUPPORTING ONGOING REFLECTIVE PRACTICE IN PROJECTS

There are many insights that emerge through the implementation and daily operation of demonstration projects that highlight opportunities for improvements. These represent the daily learnings from being involved in a project established to test and refine new approaches.

Developing strategies that support regular reflective practice and sharing of insights with other project partners strengthens the ongoing knowledge building in demonstration projects and supports the capacity to refine and improve a project's operation and practice. Development of efficient processes to capture these key learnings along the way is important for adding depth to more formal evaluations.

ACTION RESEARCH AND EVALUATION

Developing a knowledge base that informs the shaping of each successive SDA project is a key element to support innovation, as illustrated in the diagram below. This same information is useful to other organisations seeking to establish similar projects.
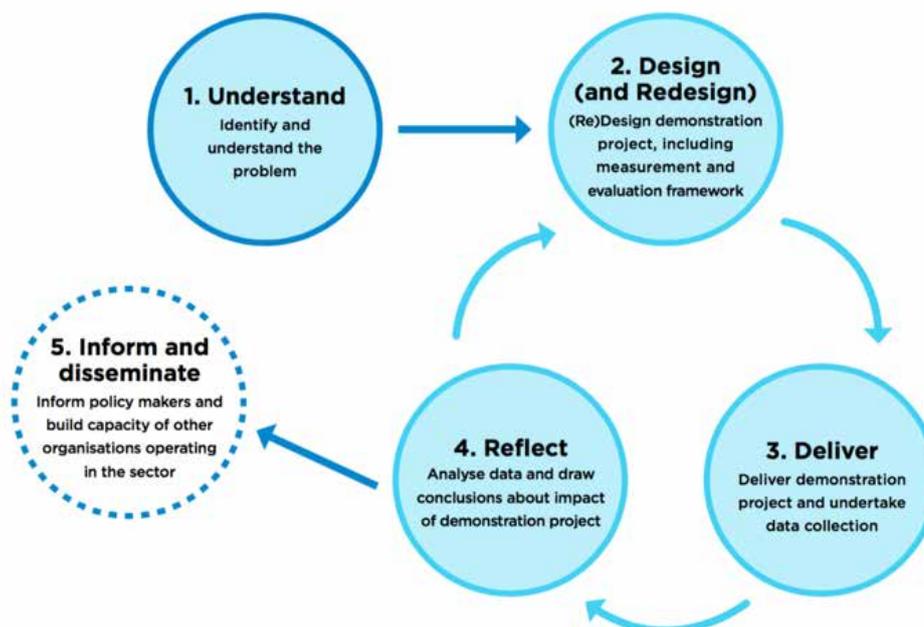
ACTIONS TO SUPPORT STRATEGIC KNOWLEDGE DOCUMENTATION AND SHARING OF KNOWLEDGE

To support reflective practice in the daily operation of projects and effectively evaluate and document the learnings and make them widely available the Summer Foundation needs to:

- Ensure the availability of skilled personnel to effectively drive, manage and coordinate the reflective practice, action research and knowledge sharing activities

- Select tenants and project partner organisations who are strongly committed to contributing to the reflective practice, the formal evaluation and research and knowledge sharing aspects of the demonstration projects

- Establish ongoing processes in each demonstration project to incorporate new learnings as quickly as possible

- Develop and continue to refine a framework that supports systematic evaluation and documentation of all key elements of the projects

- Develop a comprehensive strategy for knowledge sharing and dissemination that reaches all relevant audiences

- Seek a range of funding and collaborations to resource and support the reflective practice, research and knowledge documentation and dissemination

APPENDIX

SDA AND HOUSING RESOURCE GUIDE

Current publications and resources that support knowledge sharing

The Summer Foundation has developed a range of resources around housing and SDA that provide information for participants, supports coordinators, housing providers, builders, developers and financiers. These resources are available on our website and include:

My Housing Preferences tool: Help for participants to think about where they want to live, who they want to live with and the type of housing.
summerfoundation.org.au/my-housing-preferences

Looking For Somewhere to Live Guide: How to access and make the most of NDIS capacity building funding to look for housing.
summerfoundation.org.au/looking-for-somewhere-to-live

The Pathway to SDA: Explaining the complex pathway towards SDA eligibility for people with extreme functional impairment or very high support needs.
summerfoundation.org.au/pathway-to-sda

Specialist Disability Accommodation (SDA) Payments: A guide explaining what SDA payments are, who they are paid to and how they are accessed.
summerfoundation.org.au/sda-payments-guide

Using SDA to Buy Your Own Property: Outlining the steps required for home ownership for people receiving SDA payments.
summerfoundation.org.au/using-sda-to-buy-your-own-property

Living More Independently: A guide the help plan and prepare moving from aged care or a family home to more independent housing.
summerfoundation.org.au/living-more-independently

The Housing Hub: A website listing housing vacancies that are suitable for people with disability.
thehousinghub.org.au

Housing Plan Tool: A tool to help support coordinators test SDA eligibility for their participants.
summerfoundation.org.au/housing-plan-tool

Separating Housing & Support Services: Helping housing and support providers understand why separation is necessary and how to go about it.
summerfoundation.org.au/separating-housing-and-support-services-toolkit

Living Like Everyone Else: Outlining the 24-hour support options to consider for people with disability and complex support needs for optimal independence.
summerfoundation.org.au/living-like-everyone-else

Specialist Disability Accommodation – Market Insights: Understanding where SDA is required, needs and preferences and how much stock needs redevelopment.
summerfoundation.org.au/sda-market-insights

Designing for Inclusion and Independence: A Summer Housing comprehensive guide to building high quality housing for people with complex support needs.
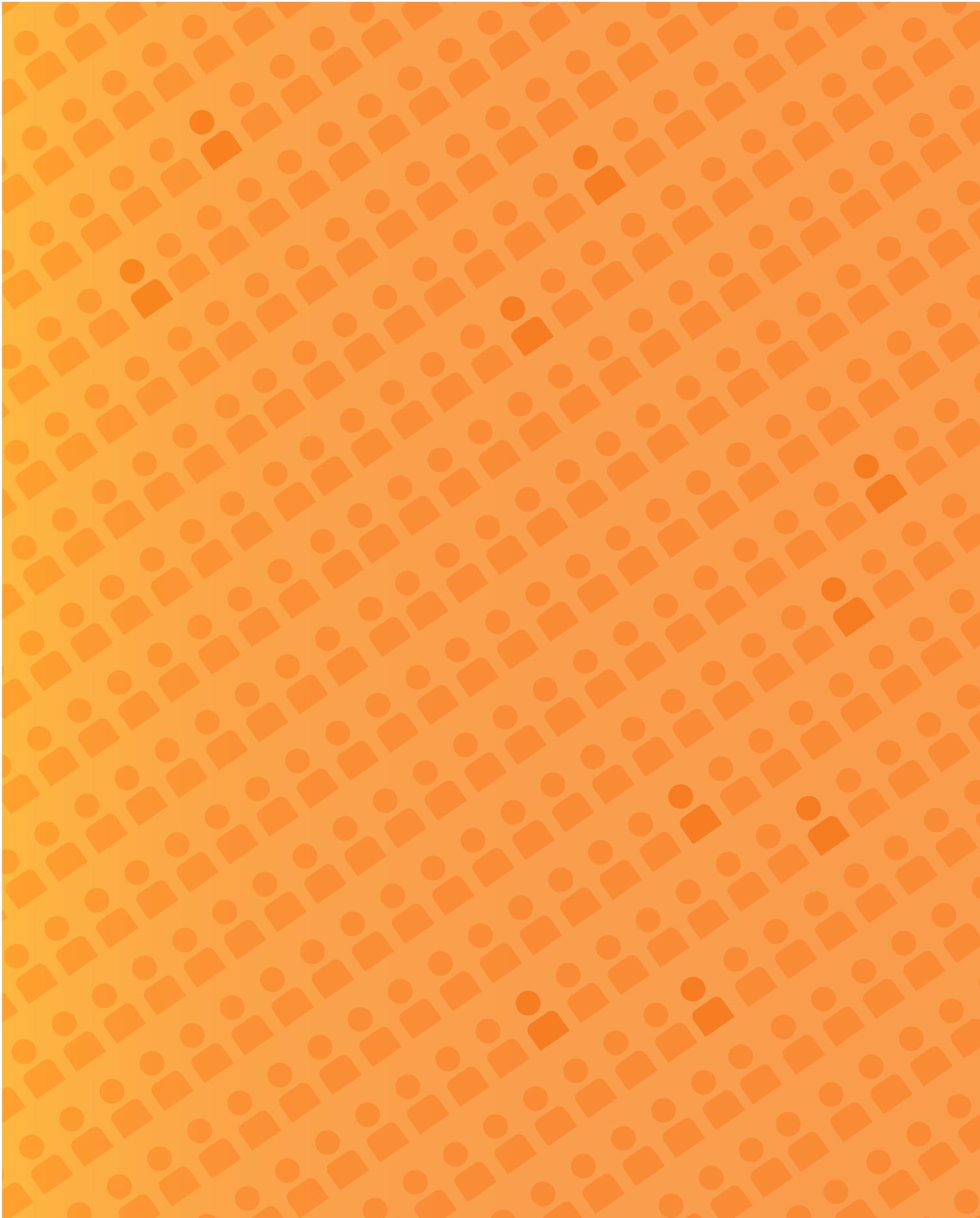**summerhousing.org.au/designing-for-inclusion-and-independence**

NDIS Specialist Disability Accommodation – Pathway to a mature market: A joint report with PWC outlining what a mature SDA market will look like.
summerfoundation.org.au/ndis-specialist-disability-accommodation-pathway-to-a-mature-market

A Successful Transition to More Independent Living: A report outlining what it takes to successfully transition people with complex needs to a more independent life.
summerfoundation.org.au/successful-transition-to-more-independent-living

Unlocking Home Ownership: A paper to inform and prompt discussion in the finance sector about addressing inequity of home ownership for people with disability.
summerfoundation.org.au/unlocking-home-ownership

NDIS Specialist Disability Accommodation policies

- SDA Rules:
  https://www.legislation.gov.au/Details/F2017L00209
- Price Guide:
  https://www.ndis.gov.au/SDA-pricing-payments.html
- Terms of Business:
  https://www.ndis.gov.au/html/sites/default/files/documents/Provider/TOB.pdf
- Decision Paper on Pricing and Payments:
  https://www.ndis.gov.au/html/sites/default/files/files/SDA/SDA%20Decision%20Paper.pdf