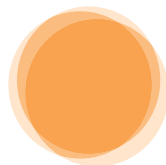




# Annual Report

2022/2023



SUMMER  
FOUNDATION

# In the past year...

## Summer Foundation



**84**  
resources and reports  
updated/published



**35**  
lived experience  
videos created



around  
**23,000**  
resources downloaded



**11**  
podcasts created

## Hospital to Home



**141**  
new referrals



**13**  
free events



**160**  
cases closed



for  
**948**  
attendees

## UpSkill



**53**  
workshops  
and webinars



**1,285**  
professionals trained

## Housing Hub



**3,177**  
property listings  
at 30 June 2023



**174,570**  
property searches



more than  
**54,000**  
resource views



**21,354**  
property enquiries

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# Sijan's story



## **Tell us about yourself.**

I'm Sijan. I'm originally from Nepal and moved to Australia when I was around 9 or 10. I was used to moving around but it was different to when I had my accident and was leaving hospital.

Moving around when you have a disability you realise that most of the world is shut off to you. It feels like you are not welcome. It feels like you don't belong anywhere.

## **Tell us about your housing journey.**

When I had my traumatic accident and gruelling rehab I was evicted from my studio apartment. I stayed in hospital longer than I should have, I couldn't find suitable housing, there was pressure from the hospital as they needed the bed. Finally, they pushed me into aged care. They said it looked nice. So I went.

It was awful, I was 18 turning 19 when I went there. I was the youngest person by 50 years. It was hard to see a way out when I was living somewhere like that.

As limiting as my disability is – I'm a paraplegic, manual wheelchair user – it makes you feel even more helpless when your accommodation isn't suitable. Where you live has a profound impact on you as person.

I had to fight the NDIA for my SDA plan – they told me I had SDA in my plan but when I showed my provider it was the wrong plan. I had a month to change it so I could move in. I had to go to the AAT to get the right SDA in my plan.

That month was one of the most stressful months of my life. You shouldn't have to fight tooth and nail for a basic human right.

## **Do you have any tips for others wanting to leave aged care?**

Have the right people around you to support you. Assess people that are working with you, in charge of your finances or support, they need to be the right people for the job. They need to understand the housing journey because unfortunately the SDA journey is understated, it is an uphill battle.

## **How has your life improved in SDA?**

I have regained at least some of the confidence and stability I had before the accident. If I want a coffee I just make a coffee, I've started TAFE and can use the gym just down the corridor.

The cloud above my head has started to fade away since I moved into SDA. The constant anxiety about going back to the aged care has slowly dissipated.

After my TAFE course I want to go to uni to become a lawyer and help people in the disability area.

## **How do you feel about working with the Summer Foundation?**

This sort of work means everything to me, honestly, it's wonderful. There is a feeling of helplessness when you are in aged care and it feels like you've failed at life. Meeting an organisation that hears you and understands your problem and wants you to be a part of it is validating. I want to be with an organisation that is listening.

# Chairman's message



**Chris Leptos AO** – Chairman

The Summer Foundation was established in 2006 to stop young people being forced to live in aged care. Over the past 17 years we have made significant progress on the issue but there is still plenty more work to be done to ensure people with disability have the support they need to be able to choose where and how they live. To achieve this, we know there must be effective systems in place to support people with disability, and a housing market that offers true choice and control.

During the 2022–2023 financial year our work has focused on bringing the voice of people with disability back to the centre of the discussion – within the health and disability sectors, with the NDIS and with the government more broadly.

As a result of our advocacy, we were especially pleased to see the public commitment to uphold the target of no young people in aged care by 2025. And the 2023/24 budget includes new funding for investment in the NDIA's workforce capability and systems, which will result in fairer and more consistent decisions around access and planning for NDIS participants. We continue to refine our strategy in response to changes in the disability sector and to policy.

The NDIS Review announced in 2022 prompted the Summer Foundation to undertake a key piece of research around NDIS participants' experiences with the Scheme. We were able to share this with

Minister Shorten to help inform the review of the NDIS currently underway. You can read about the research in **this report**.

Our Down to 10 Days campaign achieved its aims. We have seen significant improvements in the accuracy and timeliness of funding decisions for people with complex needs. We've shared an overview of the campaign and its impact so far in the pages that follow.

We continue to provide services and innovation to improve the lives of people with disability. We saw the expansion of the UpSkill program, steady growth of the Housing Hub and re-funding of the Hospital to Home program.

I'd like to acknowledge the tireless commitment of our staff, under the steadfast leadership of our CEO Di Winkler, whose energy, passion and commitment are making a real difference to the lives of people with disability across Australia. I'd also like to thank our board members, their expertise has been invaluable to the great progress we are making.

As you read through the highlights of the 2022/23 financial year, you'll meet some of our contributors. These people, and others like them are who we advocate for. Thank you to Sijan, Leanne, Mark, Sharon and V for sharing your unique stories. It's wonderful to read about progress made and inspiring for us all to keep pushing every day to improve the lives of people with disability.

# Mark's story



## **Tell us about yourself.**

I'm a 40 something bloke, a bit of a bogan. I like beer and Metallica. Then, ironically maybe, I'm quite educated. My 3 main areas of interest are business marketing, creative writing and human behaviour. Then, as more of a hobby, I'm also quite interested in personal development. Still, beyond my brain stuff, there is one part of my life that defines me most, sadly. Yeah, I'm a ventilator dependant quadriplegic and this has been my life for the past 20 years. Kinda sucks. Most of my life centres around my health routines while undeniably still trying to achieve.

## **Tell us about your housing journey.**

Well, I used to live in a group home, which in reality was more like a 20-bed mini nursing home. I was there for 16 years. Because of my high needs, in the pre-NDIS world, I had no other viable choices. So, as much as I hated it, I was stuck.

## **How did you manage to leave your previous accommodation?**

Hmm... a lot of luck and it was like the stars aligned – I hate that this was such a complicated, uncertain and drawn out process. The whole process took 3 years. I have to give heaps of credit to a number of support coordinators and service providers that supported me, honestly their knowledge and persistence is what really got me 'home.'

## **What do you like most about your life now?**

I love that I'm living in a home and not an institution. I am surrounded by my things, my home is representative of my personality, and best of all, it's a place that my friends aren't afraid to visit. Plus, I live right near a shopping hub now, super cool. It feels natural, I can be who I'm meant to be and live "normally," which gives me heaps more confidence in myself as a person. Rather than living the robotic institutional life, I now feel human.

## **How do you think the housing process could be improved?**

I think there needs to be specific teams (maybe from organisations like the Summer Foundation) advising people of their options. I found the institution where I was (and I assume this would often be the case as there's so much money involved), but they don't want you to leave, even if it would drastically improve your quality of life. I experienced zero help. Sure this is business, but it's not really cool or ethical for institutions to be playing with people's lives in such a way.

## **If you met with NDIS Minister Bill Shorten, what would you like to say to him?**

Hello.

# The issue

## Young people in aged care

**While the number of young people with disability forced to live in aged care in Australia continues to show a welcome drop there is still much change needed.**

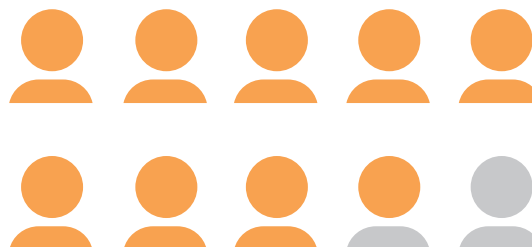
As at 30 June 2023, there were 1,743 NDIS participants aged under 65 living in aged care, including 34 people aged under 45.

Many of these people have previously led productive, everyday lives. Around half have partners and more than a quarter are parents of school aged children. Moving into aged care often leads to the loss of relationships, independence and skills.

The issue is complex and crosses multiple settings and sectors, including hospitals, housing, disability and primary health. It can only be resolved when the systems, policy settings and markets work together to ensure people with disability are able to choose where, how and with whom they live – just like people without disability.

**AT 30 JUNE 2023 THERE WERE**

# 1,743



**NDIS PARTICIPANTS AGED UNDER 65 LIVING IN AGED CARE**



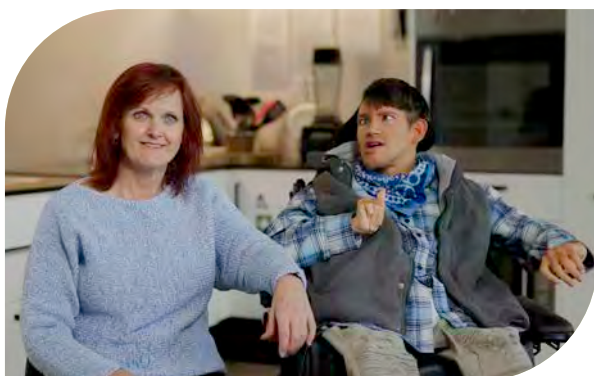
# Solving the issue

## Why we exist

The Summer Foundation exists to permanently stop young people with disability from being forced into residential aged care (RAC), ensuring people with disability have access to the support required to be in control of where, how and with whom they live.

## Our strategic priorities

Our work is shaped by 4 strategic priorities that together will move us closer to achieving our goal of stopping young people from entering aged care.



### **PRIORITY 1: Stop the flow in**

No younger person (under 65) admitted to aged care



### **PRIORITY 2: Leaving residential aged care**

All young people with disability in aged care have made an informed choice on where they want to live and the support they will receive



### **PRIORITY 3: Access to quality housing**

NDIS participants with complex support needs can readily access a range of home and living supports, which means people can live where and how they wish



### **PRIORITY 4: An effective NDIS for our cohort**

A re-designed NDIS that works well for participants with complex support needs



“

*I can be who I'm meant to be and live 'normally,' which gives me heaps more confidence in myself as a person.*

*Rather than living the robotic institutional life, I now feel human.*

”

# How we work

To achieve our goals as detailed in our strategic priorities, we use 5 key levers.

We generate evidence such as published research and lived experience as a basis for all our work, and innovate through the co-design of new solutions and services.

We work with government and influence people on the inside. Our systems advocacy work sees us apply pressure from the outside by harnessing public support. Where necessary, we use a legal lever and support people to fight for their rights.

While this report breaks our activities for the past year down under the headings of 'Research', 'Service delivery and innovation' and 'Systems change', as systems entrepreneurs we use all levers together to bring about real and lasting change.



## **EVIDENCE:**

We use lived experience, peer reviewed and public research to inform the development and evaluation of potential solutions, resources and tools



## **INNOVATION:**

We build on the expert knowledge from those with lived experience of the issue of people with disability to inform, co-design and evaluate new services, solutions, resources and tools



## **INSIDE:**

We define, promote and advocate for best practice policy to influence and inform government policy and agendas



## **OUTSIDE:**

We publicly campaign to elevate the stories of people with lived experience to build public support and motivate politicians to act



## **LEGAL:**

We support people to fight for their rights and hold the government to account



## Co-design

The Summer Foundation's purposeful inclusion of lived experience has evolved over the past 15 years, bearing testament to the importance of it as a key tool in our work. We have developed a niche expertise for creating the environment and methodologies for successfully working with people who have the most complex support needs to enable them to contribute to solutions in a purposeful and authentic way.

By honing design skills to suit people with cognitive and communicative disabilities, a set of methodologies has evolved. These methodologies are transferable across a broad range of disabilities, and also apply to people who do not necessarily have a disability, but have lived experience of the various stakeholder groups relevant to issue of young people in residential aged care.

A recent example of this work saw the team facilitate a number of Housing Hub user group workshops and audience listening workshops to support users of the Housing Hub. The workshops resulted in an improved user experience through changes to the type of information shared and the way information is presented

While the Co-design team furthers the Summer Foundation's commitment to bring lived experience into the way the organisation responds to tackling

the problem of young people in aged care, the services of the Co-design team are being increasingly applied outside the Summer Foundation.

A range of external organisations has engaged the Summer Foundation's ability to translate lived experience into illustrating, informing and designing solutions.

The Summer Foundation will continue to offer the services of the Co-design team to external customers on a fee-for-service basis. It offers a range of capacity building training services, along with lived experience facilitation to illustrate, inform and design solutions to support the work of other organisations.

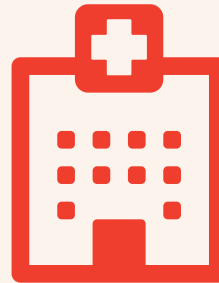




Priority 1:

# Stop the flow in





Collected hospital discharge data on more than

**460**

patients, from 8 hospitals across Australia.

**'Stop the flow in', our first strategic priority, aims to stop young people with disability entering aged care.**

## Research

The Research team's work in building evidence is a critical tool to stopping the flow of young people with disability into aged care.

Given that many young adults in RAC are discharged there from hospital, we are conducting a number of research projects to explore the healthcare needs and experiences of leaving hospital for people with complex needs.

Our national longitudinal study has collected hospital discharge data on more than 460 patients across 8 hospital sites in Australia. Follow-up interviews have also gathered data from more than 20 NDIS participants and family members one year post discharge.

PhD student Suzanne Currie is conducting a qualitative investigation of the transition experience of people with severe acquired brain injury moving from inpatient rehabilitation to the community. Suzanne's PhD topic emerged from her experiences as a physiotherapist working in acquired brain injury (ABI) rehabilitation, and the gaps in translating gains made in hospital to living independently in the community. This study seeks to understand how the experience of re-engagement into the

community and maintaining important relationships and social networks can be improved. The research protocol has been published in BMJ Open journal.

A scoping literature review of the components of a successful hospital discharge for people with acquired disability was recently accepted for publication in a peer-reviewed journal. This review provided recommendations for hospital discharge professionals working with people with acquired disability and complex needs to avoid lengthy delays and inappropriate discharge destinations.

These interviews provide valuable insights into the experiences and outcomes of hospital discharge for people with disability and we are analysing this data for publication next year.

By documenting the reasons patients get stuck in hospitals, are discharged to inappropriate settings like RAC, or experience positive outcomes, we can pinpoint areas within policy and practice that need improvement.

Effective management of health in the community will reduce the risk of hospitalisation and admission to RAC. The research is building an evidence base to improve primary health care services. The first study in this series involved the publication of a scoping literature review of the healthcare needs and general practice utilisation of people with acquired neurological disability and complex needs. This review was published in Health Expectations.



### UpSkill



**1,285**

professionals trained

### Hospital to Home



**160**

cases closed

A data linkage project on the primary healthcare needs and service utilisation of NDIS participants is in progress with a protocol published in *BMJ Open*. This data linkage study will describe general practice service use, including health needs treated at general practice, for NDIS participants. Future research aims to better understand and improve the general practice experience and ultimately improve health outcomes of people with disability.

Ten researchers from the Summer Foundation Research team presented research findings at the Australasian Society for the Study of Brain Impairment (ASSBI) conference earlier this year. ASSBI conferences are typically attended by a mix of researchers and health professionals, making it a good opportunity to share research findings with those working in practice. Ella Rose-Minter presented research on barriers to effective discharge from the perspective of health professionals working with hospital patients who have disability and complex needs. The findings illustrated the challenges to timely and effective discharge of NDIS participants and the complex interplay of the health, NDIS and disability sectors. Ella's presentation was awarded the ASSBI Mindlink Brightwater Award for an Interdisciplinary Presentation.

## Service delivery and innovation

### UpSkill

Our UpSkill program is part of an overarching strategic objective to ensure sector professionals are educated and informed on critical housing pathways. They can then use their specialised knowledge to support people into appropriate housing. The continued expansion of UpSkill feeds into this objective.

In FY22/23 the program broadened its curriculum to include more specialist content for health clinicians. A new eLearning platform was launched, which delivers specialist knowledge and learnings that are essential to stopping the flow into aged care.

### Hospital to Home

The Hospital to Home program supports hospital discharge teams and support coordinators in facilitating effective discharge for people with disabilities who are stuck in hospital. We continued to build the capacity of hospital teams, we accepted 141 new referrals from hospitals in Victoria, New South Wales, South Australia, Queensland and Western Australia, and closed 160 cases. This important work was re-funded for FY24, and was supported by the Victorian Government for the Pathways to Home program, and the James Frizelle Foundation, William Buckland Foundation and WCF Thomas Charitable Trusts.



## Systems change

The Summer Foundation engages directly with government to influence policy change. We actively participate in the Federal Government YPIRAC Stakeholder Reference Group and the YPIRAC Systems Coordinator Program Steering Committee. In FY22/23 this work included the publication of 4 submissions and position papers to highlight significant gaps in policy that facilitate the flow of young people into aged care.

We collaborated with Synapse, YPINH Alliance and Youngcare and continue to agitate for a concrete plan to stop the flow of young people into aged care.

### Down to 10 Days

One of the reasons young people have continued to flow into aged care is because decision-making by the NDIA has been too slow. To address this we established the Down to 10 Days campaign, which advocated to government and the NDIA to make faster, accurate home and living decisions. The public commitments that were made in 2022 by both the Federal Government and the NDIA have been backed up with real changes in the decision-making timelines. While decisions are not being made in the 10 days we advocated for, the significant decrease in time is a major success.

The latest NDIA Quarterly Report shows significant improvement in the time taken to provide funding decisions on home and living supports. Data shows that just 11% of decisions took longer than 60 days in Q3 of FY22/23, down from 45% 12 months ago.

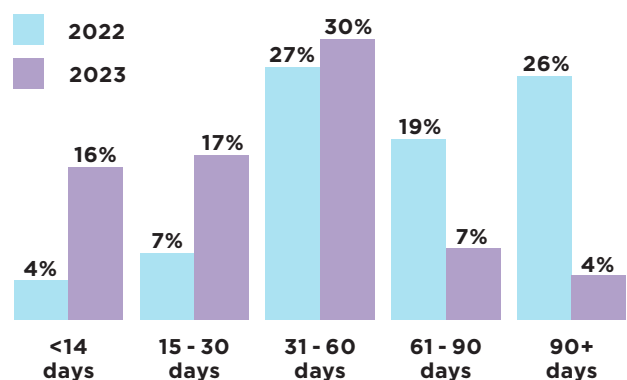


**11%** of decisions took longer than  
**60 days**  
in Q3 of 22/23



down from  
**45%**  
12 months ago

### Percentage of NDIS home and living applications and time taken to complete





# Leanne's story

## **Tell us about yourself.**

My name is Leanne and I have been living with MND for the last 8 years. I am 43 years old.

## **Tell us about your housing journey.**

In the past 5½ years I have gone from living in a suburban house to a nursing home to recently moving into an SDA apartment.

It took 1 month to move from RAC. The aged care was closing and I was given the marching order. The SDA was right next door to the aged care, I watched it being built. My support coordinator found out more about it after we saw wheelchairs going in and out of the building.

I was torn between aged care and SDA - I was familiar with one and stranger to another. Everyone I knew was pressuring me to accept aged care but I wanted the control of my care so it's SDA for me. The location is perfect but I wish I had more choices to really make an informed decision.

## **Do you have any tips for others wanting to leave aged care?**

Aged care is not the kindest place to live for people with high functioning abilities despite their age or disabilities. I think it's more important to be absolutely sure about entering one rather than leaving one.

## **What do you like the most about your life now?**

Being in control of my care. Compared with aged care, I have the full control of what I want to do, when I want to do it and most importantly, the carers that I want to work with.

## **How did you become involved with the Summer Foundation?**

Through my support coordinator when I was moving out of the aged care. I hope my story can help others, I don't know how much I can do, I'd sure love to help out.

## **How do you think the process for people with disability finding appropriate housing could be improved?**

A centralised register with all SDA addresses and contact details for each state. My SDA was never advertised but I had watched it being built. It would have been easier if there was a register so I could call based on my criteria of search.

## **If you could speak to (NDIS) Minister Bill Shorten, what would you want to tell him?**

Thanks for the opportunity to do the things that I could never do without the NDIS.



Priority 2:

# Leaving residential aged care





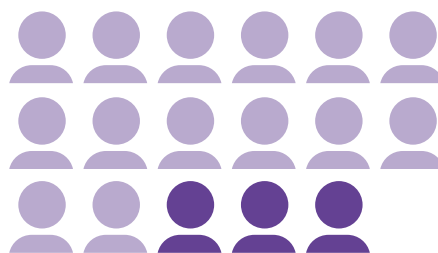
**Our second strategic priority, 'Leaving residential aged care' is focused on supporting people with disability to make an informed choice on where they want to live, with the ultimate goal of leaving residential aged care and moving into appropriate housing.**



## **Research**

A qualitative study is being undertaken to explore the barriers and enablers to young people leaving residential aged care. The study is focused on people under 65 years living in residential aged care as primary research participants, and interviews and analysis have been undertaken with the first 8 participants. Preliminary findings show that despite the wish to move to independent housing, the specific type of housing needed was either not available in their local area and/or that systemic blockages prevented participants from accessing housing consistent with their stated preference.

Recruitment for this study is ongoing and has been broadened to include people working with young people in residential aged care (e.g. guardians, support coordinators, family and support workers). The findings of this study will inform systemic advocacy around what needs to change to support people to navigate pathways out of residential aged care.



**3 out of 17 young people have been supported to successfully move out of aged care.**

## Systems change

The Summer Foundation continues to advocate for young people who are stuck in aged care.

Part of this advocacy is giving voice to the people who have lived experience of living in aged care. This saw us assist multiple young people to share their stories of what life was like for them in aged care. You can view these powerful stories on the "Our Stories" section of the website. You can view them here: [summerfoundation.org.au/stories](https://summerfoundation.org.au/stories)

After the 2022 young people in residential aged care targets were not met, the Summer Foundation has worked to get a firm commitment to the remaining targets, specifically no young people in aged care by 2025.

In May 2023, NDIS Minister Bill Shorten confirmed on the Summer Foundation podcast, Reasonable & Necessary, that the government was committed to meeting the 2025 target. Through both public and direct to government advocacy we continue to seek visibility of a plan that will see this happen.

## Service delivery and innovation

The Summer Foundation identified an opportunity to work directly with young people in aged care and provide them with the support they need to make an informed choice on where they want to live.

The 'Getting YPIRAC Out' project launched in October 2022. The aim of this project is to identify young people with disability living in aged care, and provide them with individualised support to make an informed decision on housing.

To achieve this, in 2022/23 we engaged with hundreds of residential aged care providers across Australia.

As a result of this work, we have supported 17 young people in aged care to learn about the housing options available to them and explore their housing goals. We have supported 3 of these people to successfully move out of RAC.



“

***It might feel like you haven't got choice and control but there are avenues you can take if you have the right supports in place.*** ”

**Samar, SDA tenant**

# Sharon's story

Sharon (right) with Senator Jana Stewart

## Tell us about yourself.

My disability is severe scoliosis, I have bi-polar, borderline personality disorder, severe anxiety disorder and severe PTSD. I'm 55, I have 4 children and 6 grandchildren. I have my 5th child Baby, my beautiful cat who is 3.

I have lived in a few places - NSW, Queensland and Tasmania, but I always end up back in Victoria.

## Tell us about your housing journey.

I spent 2 months in hospital and didn't realise at the time that I was being assessed for aged care. I was about 48. I was in 2 aged care places over 4.5 years and was 52 when I left aged care.

I ended up being an advocate for the others living in aged care, I loved the people living there. I would have stayed longer as I felt they needed me, I just couldn't cope with them dying.

I had been looking for housing for a long time. In the end I said I can't take it anymore so my support coordinator at the time found me Medium Term Accommodation and within 2 days I was out. I didn't even pack, it was picked up for me. It was supposed to be for 3 months, but I ended up there for a year.

## Do you have any tips for others wanting to leave aged care?

Don't stay where you are just because you think you have to. Make every effort to do and be what you want. You don't have to be in aged care.

Young people don't have to live in those sorts of situations, sometimes your body gives up but your mind doesn't. Mentally I'm still there.

Be careful who you choose to support you, make sure you have someone trustworthy to help you move out.

## What do you like the most about your life now?

This apartment is the best thing that has happened to me.

I love buying things for my home and having them around me. In aged care there was always the risk they would get broken. I even collect teapots now, I love having a home not a house.

I'm very happy here, I love this place. The people that live around me are really nice, my neighbours are good. It's good being able to go out on my scooter and be in the community.

## Senator Jana Stewart visited your new SDA apartment. How was that?

I was amazed I had a Senator come to see me in my home so that I could share my lived experience of how my SDA home has changed my life. I didn't know what to expect, but she was so down to earth and lovely.

I really liked the Senator. She tried to help me by writing a letter for me - that was really sweet.



Priority 3:

# Access to quality housing





**In order for young people to leave aged care it is imperative they have access to good quality accessible housing. Our third strategic priority, 'Access to quality housing' addresses this barrier with multiple projects to support, illustrate and advocate for quality housing for people with disability.**

**By 2025**

**30,000**

**people are expected to be receiving SDA payments through the NDIS**

## **Research**

Part of the solution to younger people leaving aged care is alternative, suitable accommodation, such as specialist disability accommodation. By 2025 around 30,000 NDIS participants are expected to receive SDA funding. Hundreds of new SDA are being built every year; however, there's a lack of evidence about the impact of SDA. Without knowing what works and what doesn't, there's a risk that the housing sector will develop SDA that does not contribute to positive outcomes for people with disability.

To address this evidence gap, our Research team is coordinating a national longitudinal study evaluating the impact of SDA. In collaboration with La Trobe University and the University of Queensland, the study investigates the factors that can shape an SDA tenant's housing outcomes.

Key outcome areas include overall health, mental wellbeing, community participation, disability support needs, and the economic impact of people with disability moving into SDA. The project aims to collect data from approximately 250 NDIS participants living in SDA, as well as up to 100 of their family or friends who can reflect on the transition experience. Study participants are interviewed at 3 key time points: before they move into their SDA, 6-12 months after moving in, and 2 years post-move.



Results from the pilot study have been published in 2 peer-reviewed journal articles. Quantitative data revealed significant improvements in some outcome areas for tenants after moving into SDA, including reduced support needs and improved wellbeing. Qualitative data complemented these findings, as tenants reflected on the experience of transitioning into SDA for the first time.

In January 2023, the project's goals and methods were validated by receiving a major grant from the Australian Research Council. The \$532,000 grant, along with contributions from research partners, will see the project continue for at least another 3 years. By collaborating with key stakeholders such as housing providers, SDA investors and government agencies, the research will have tangible, real-world impact. Findings will influence areas including the design of future SDA and the way that disability support is delivered in an SDA context. They will also have implications for the NDIS and government policy.

People with progressive neurological diseases, such as multiple sclerosis (MS), have unique housing and support needs compared to those with non-progressive disability. MS Australia awarded a \$25,000 incubator grant for our research team to study the housing and support needs and preferences of people with MS.

In addition to reviewing the literature on this topic, the Research team has extracted data for people with MS from our other projects exploring housing and support needs for people with disability. In collaboration with a reference group of people with MS, family members and researchers and clinicians with experience in MS, the integrated data from these projects will provide valuable insights into the barriers, facilitators and opportunities for people with MS to live where and with whom they wish to live. The findings of this study will inform a co-designed intervention to improve housing and support outcomes for people with MS.

**View all our research reports, summaries and journal articles:**  
**[summerfoundation.org.au/research](https://summerfoundation.org.au/research)**



**3,177**  
property listings  
at 30 June 2023



**174,570**  
property searches

## Service delivery and innovation: Housing Hub

The Housing Hub was launched in 2017 by the Summer Foundation as a social impact initiative. Its aim was to support the development of the fledgling specialist disability accommodation market. It has come a long way since then, and now provides a range of services to assist people with disability to find appropriate housing. At the heart of the Housing Hub service offering is the belief that people with disability deserve choice and control and should be able to live how and where they would like.

Services include a team of home and living specialists, residential aged care service coordination, a housing advice line and a website that hosts listings for available accessible housing. There is a range of services available for housing seekers, housing providers and for those who support people with disability.

The Housing Hub is a place for people who are looking for housing to learn about the disability housing market, understand what is possible and find a home that suits their needs. It supports providers to connect with people with disability who are searching for a home, and supports professionals who assist people with disability through its vast library of resources. These provide up-to-date, reliable information on navigating the NDIS and guidance on best practice in supporting people with disability find a home.

### The Housing Hub website

The Housing Hub website is the leading resource for people looking for accessible housing and has become the number 1 website for accessible housing since its launch in 2017. As at June 30, 2023 the Housing Hub had 3,177 listings on its website, and across FY22/23 there were 174,570 property searches.

The Housing Hub website has undergone a series of improvements during the FY22/23 period, with a strong focus on enhancing website accessibility and user experience for people with disability.

Some of these improvements include the addition of a "suitability score" so registered seekers can understand how closely a property is aligned with their needs. Listings now open in separate tabs so a seeker can keep searching while considering all the options available. It also now features a distance-based property search, further enhancing the ability to include individual preferences.

Property listings now include a field that showcases the LHA (Liveable Housing Australia) design guideline level the property was built to. This new field allows providers to specify the level in their listings by selecting one of the options: "Silver", "Gold", or "Platinum". This provides valuable information about the accessibility and features of properties listed.



THE HOUSING HUB HOME AND LIVING SPECIALISTS TEAM PROVIDED NEARLY

2,300

HOURS OF FUNDED SUPPORT TO

114

NDIS PARTICIPANTS

The SDA Eligibility Checker is now easily accessible through a dedicated page and widget. This short questionnaire asks the user a series of simple questions to ascertain if they may be eligible for SDA funding noting that this is a preliminary assessment based on information provided. Only the NDIA can confirm SDA eligibility.

These improvements collectively aim to provide a more accessible, user-friendly and reliable experience for all users, including people with disability who access the Housing Hub website.

The Housing Hub team has also produced a range of reports that provide practical data on supply and demand in the disability housing sector to help the market better understand supply and demand. These have been downloaded more than 5,250 times, illustrating an appetite for such important information, and filling an information gap that has been pivotal to the market growth.

### Home and living team

The Housing Hub Home and Living Specialists team provide expert assistance to people with disability to identify their housing needs and preferences, access NDIS funding and move into a new home. They are a national team with expertise in the NDIS and the accessible housing market and work collaboratively with NDIS participants and their existing team to ensure that people with disability can live where, how and with whom they choose.

The team offers specialised and individualised approaches to getting the right NDIS home and living supports in place.

The service has continued to experience steady growth, and in FY22/23, they provided nearly 2,300 hours of funded support to 114 NDIS participants, helping many people to achieve their housing dreams. The Housing Hub has partnered with Verbinding, a registered NDIS provider, to deliver this specialised service.

To continue providing this specialised service, the Housing Hub has been working towards becoming an NDIS service provider. The auspice arrangement with Verbinding will continue while we work towards this registration.

Testament to the excellent work they are doing, in April the Housing Advice Line team and the Home and Living Specialist team were awarded the Developing Australian Communities' Team Award at the Melbourne Disability Staff Recognition Awards. This award recognises the most outstanding NDIS provider team that displays exceptional service to participants in the disability sector.



### Tenancy Matching Service and consulting services

Over the past 5 years, the Housing Hub's Tenancy Matching Service has supported 950 people in their search for a place to live. With the changing landscape of disability housing, it was decided to wind this service down in the first half of 2023. The learnings from the Tenancy Matching service will inform how we support people with disability and housing providers in the future.

These learnings are proving particularly helpful with our new consulting service. This service is made up of a team of accessible housing market experts who work with both new and experienced housing providers to build their market knowledge, develop their teams, improve their service, and assist with finding tenants. The overarching goal of this service is to contribute to a more efficient market that empowers people with disability to have choice and control.

### Housing Advice Line

The Housing Advice Line (HAL) receives phone, email and web enquiries. It provides information to people seeking to explore disability housing. Advice generally relates to the complex processes around disability housing, including eligibility criteria and funding options. From January through to June, the HAL received almost 155 enquiries per month across all its platforms.



**...you have given me hope.**

**...your knowledge and information has been incredibly helpful.**

RESPONSES FROM CALLERS TO THE HOUSING ADVICE LINE

### Housing Options

The Housing Options team exists to support people with disability, their families and other supporters to find out about their housing options, increase their knowledge and better understand how and when to take the first, or the next step on their housing journey. As well as being designed for people with disability, some of our services are also delivered by people with disability.

They create new information, products and services that housing seekers and their supporters have told us they need. The team uses a co-design approach to ensure that the content, resources, and information sessions produced are impactful, market-leading and high quality. This co-design approach includes employment of people with lived experience within key services and engagement of consultants with lived experience to contribute to the development of the products.

The Housing Options team regularly delivers training and information sessions to people with disability with complex support and communication needs, including their families and supporters. In FY22/23 it ran 13 free events with 948 attendees, which included NDIS participants, their supporters, support coordinators, allied health professionals and other NDIS professionals.



## 3 out of every 4

Australians with mobility impairments live in houses that do not meet their needs

### Systems change

We continue to agitate for changes to housing policy through regular meetings and formal consultations with state and territory governments to explore different approaches to SDA. We seek to influence best practice in SDA management and delivery that puts the needs of people with disability first.

Part of our strategy aims to ensure housing policy strengthens the rights and choices of people with disability so they can access safe, secure housing that meets their needs now and into the future.

We work towards this goal using tools such as submissions, position papers and in-person interactions.

In FY22/23 we led 6 SDA site visits with MPs and Ministers to show what innovative individualised housing for people with disability looks like. The aim was to demonstrate the impact of slow decision-making and poor market stewardship by the NDIA, and support people with disability to speak about their experiences with the NDIS and SDA.

We know Australia’s housing stock does not meet the needs of people with disability who are not eligible for SDA. Recent research we undertook shows 3 out of every 4 Australians with mobility impairments are living in houses that do not meet their needs.



### Building Better Homes

A National Building Code for All Australians

### Building Better Homes

Our Building Better Homes campaign was established to advocate for accessible housing standards to become part of the National Construction Code. Accessible design features and home modifications to improve physical housing accessibility illustrate how imperative accessible design is to living well with disability.

In FY22/23, 6 states and territories outlined their timelines for implementing these standards, including South Australia agreeing to adopt the standards following our advocacy. Our work continues in FY23/24 to ensure all jurisdictions implement their announced timelines and to get Western Australia and NSW to sign up to adopting the standards.

#### State / territory Date for adoption of code

Australian Capital Territory	1 October 2023
Northern Territory	1 October 2023
Queensland	1 October 2023
Victoria	1 May 2024
South Australia	1 October 2024
Tasmania	1 October 2024
New South Wales	Not adopting
Western Australia	Not adopting



Priority 4:

# An effective NDIS for our cohort





**The NDIS has been life-changing for most people with complex needs in Australia over the past decade, but we are now in a period of potential major reform. For people with disability to no longer be forced to live in aged care, we need the NDIS to be effective into the future at supporting people with complex needs.**

## Research

When the NDIS Review was announced by Minister Shorten in October 2022, the Summer Foundation recognised the opportunity to bring the voice of people with disability to the review. Supported by People With Disability Australia (PWDA), we undertook a significant research project, "Getting the NDIS back on track: A survey of people with disability" that captured the experiences of people with disability and their interactions with the NDIS. The aim of the project was to obtain the perspectives and priorities of people with disability regarding the changes needed for NDIS 2.0.

Almost 500 people responded to the survey. Key findings included that the NDIS has helped people to achieve important and transformative outcomes in their lives, but accessing and navigating the NDIS was difficult, and dealing with the NDIA was time consuming and stressful.

Participants worried that the improvements the NDIS had brought to their lives could be taken away at short notice due to potential funding cuts. This rich and detailed information was collated, analysed and synthesised into a report that was provided to Minister Shorten in November 2022 to help inform the NDIS Review.

In response to the NDIS Review, Dr Mark Brown, a Summer Foundation Senior Research Fellow, co-authored a report on the NDIS with Dr Simon Duffy, which reviewed the issues with the NDIS, from an international perspective. The report stimulated constructive debate within the disability sector by bringing to light fundamental design flaws of the NDIS that contribute to the scheme operating in a way that is not consistent with its original intent.





## REASONABLE & NECESSARY

WITH DR GEORGE

**20,367**

PLAYS

**2,000+**

PLAYS PER EPISODE

Dr Megan Topping's PhD investigated what quality support looks like from the perspective of people with disability. This groundbreaking research received the Nancy Millis award, given to authors of outstanding doctoral theses.

Continuing with this investigation into quality support, the team recently published research on the development and evaluation of a participant-led video intervention to support people with disability to communicate their needs and preferences to their disability support workers.

In addition to the survey, the Research team conducted an in-depth qualitative study of the experiences of NDIS participants. The aim of the study was to better understand, from the participant perspective, the challenges, opportunities and potential solutions for enhancing the Scheme's equity and sustainability. The findings suggest that NDIS participants want the NDIS, as a system, to act more like an ally, fostering a more empathetic, transparent and reliable relationship with participants. To translate these findings into reforms that are effective and responsive to the needs of NDIS participants, it is essential they are developed and implemented with people who have lived experience as NDIS participants. The next phase of this project is a series of co-design workshops. We aim to generate recommendations for an improved NDIS which are informed by people with lived experience of the Scheme.

## Systems change

The Summer Foundation podcast, Reasonable & Necessary, hosted by Dr George Taleporos, brings all things NDIS into sharp focus. Each episode hones in on a topic that is relevant to NDIS participants, disability sector professionals and policy-makers, with a particular focus on supporting NDIS participants with complex needs.

The 10 episodes produced in FY22/23 featured guests including Minister Shorten; NDIA Chair Kurt Fearnly; NDIA CEO Rebecca Falkingham; NDIS Quality and Safeguards Commissioner Tracy Mackey; and co-chairs of the NDIS Review Professor Bruce Bonyhady AM and Ms Lisa Paul.

The podcast has been played 20,367 times, which translates to just over 2,000 plays per episode. The monthly broadcast seeks to support and advocate for NDIS participants, and provide a platform for exploring and interrogating the NDIS, the NDIA and the far-reaching implications of the Scheme.

In FY22/23 we made several submissions to the NDIS Review. The first responded to a request from the NDIS Review Panel for submissions on how the NDIS assists participants to live independently by funding home and living supports. The second submission responded to the public inquiry into improving the NDIS Quality and Safeguarding Framework and focused on improving choice and control over shared support in SDA.



**Annual Public Forum 2022**

The Summer Foundation was also invited to take part in an NDIS Review Roundtable on Housing and Living Supports in June 2023.

We also made several submissions and a presentation to the Joint Standing Committee on the NDIS, specifically on its inquiry into the culture and capacity of the NDIA. Pleasingly, our work was quoted in the Committee's interim report released in March 2023.

The Summer Foundation's 2022 Annual Public Forum was held on 25 November, focusing on what the NDIS might look like in a new era.

Amid a feeling of optimism in the disability community, our panel of experts, made up of policy makers, sector experts and people with lived experience of disability, came together to discuss what a reimagined NDIS might look like.

Bram Heinrich-McPartlan and Tobias O'Hehir brought the voice of lived experience to the discussion, with valuable insights into their own experiences navigating the NDIS.

John Dardo, Deputy CEO Partners, Providers and Fraud Taskforce Group, represented the NDIA and was joined by Alecia Rathbone from the Housing Hub and Paul Simmons from Ability SDA, who added to the discussion from the perspective of sector and housing professionals.

## Service delivery and innovation

The Summer Foundation's Co-design team worked on a major NDIS improvement project known as the Workforce Capability Framework. The framework is a tool that describes the skills, attitudes and knowledge expected of all workers funded under the NDIS.

This co-design project was a significant piece of work from November 2022 until March 2023. The project involved working with 20 NDIS participants exploring ways the Workforce Capability Framework could be better accessed by NDIS participants. The project resulted in a list of recommendations of tools and resources to increase the usefulness of the framework to NDIS participants.



# V's story



**V was 34 when she had 2 strokes within 3 days. She fought to stay out of aged care, then continued to fight for years to get her own accessible home in the community.**

## **Tell us about yourself.**

My name is V. I turned 50 in January. I live with my husband and our fur-baby Zola in public housing. It's a new build that is fully accessible, and after all my housing dramas I'm finally in a house I can call my home.

## **Tell us about your housing journey.**

My housing journey started as soon as I had my strokes – hospitals, high dependency unit, rehab, a medical transit unit where I was surrounded by the elderly waiting for nursing homes. I stayed there for 8 months because I refused to go to aged care. People were dying around me; it was so incredibly sad. I did go and look at one aged care. My 15-year-old niece said this is where people come to die not live. I was 35 at the time and in the supposed prime of my life.

Then I got transferred to multiple interim accommodations until they finally placed me in a 'permanent' home – that I already knew wasn't my forever home – while I waited for my house to become available.

In February 2015 I was given my first from NSW Housing – but it wasn't fully accessible. I'd have to do a 50-point turn to make my way around the house, it was like I was in a pinball machine.

Two years later we moved into the house I'm in now – that was nearly 7 years ago. This is our forever home as I don't intend to move so we've now invested our money into home improvements.

## **How long have you been involved with the Summer Foundation?**

I first came into contact with the Summer Foundation in 2014 when they facilitated me writing my first story. When it feels like the NDIS is against me, I know the Summer Foundation understands me, they're a huge blessing to have in my life.

Feeling listened to, feeling heard and feeling like what you say is important, it's something that doesn't happen often, so I highly value their support over the years.

I'm passionate about advocacy and want to do more.

## **What do you think a strong NDIS looks like?**

A strong NDIS is both fair and sustainable. The NDIS is unrealistic at the moment – they are comparing apples and oranges. Two people having a stroke doesn't mean their needs are the same. They talk about choice and control, but I don't feel like they deliver on that.

I feel like it has been designed so it's more advantageous for providers and health professionals than for participants. The NDIS needs to correct this balance.

# Summer Foundation Impact to Date

The Summer Foundation was established in 2006 to stop young people being forced to live in aged care. Since then, we have had a significant impact on getting young people out of aged care, and on housing for people with disability more broadly. Highlights of our impact from the previous 17 years are detailed here.

Supported over  
**250 YPIRAC\***  
to have a voice and  
tell their story

Supported over  
**100 people**  
to produce a short video

**Changed  
building code**  
Over **35,000** silver level  
accessible homes will be  
built by 2025 (TAS & SA will  
adopt silver level Oct 2024)

\*young people in residential aged care



Confirmed government  
commitment to  
**measurable 2025**  
YPIRAC\* targets



Advocacy resulted in NDIS  
decisions reducing from  
**160 days** to  
**29 days** saving health  
systems up to **\$550M**



Published data showing that  
the NDIS was not being a  
model litigant regarding  
SDA decisions. Resulted in  
policy and process change



Co-designed more than  
**20 resources**  
to build the capacity  
of NDIS participants



**Published  
43 studies**  
in peer reviewed journals  
to provide an evidence  
base for systems change



The sector has replicated  
our 10+1 housing  
innovation:  
**1,300 apartments**  
**enrolled**

# Housing Hub

5 year outcomes  
(2018 - 2023)



**359,000**

property searches  
supporting seekers  
to find a home



**5,100**

professionals improved their  
knowledge to better support  
people with complex needs



**250,000**

views of resource pages  
providing capacity  
building to the sector



**24,800**

seeker enquiries  
to providers  
about listings



**6,200**  
active seeker profiles  
on the Housing Hub



**Over 4,000**

workshop and event  
attendees received  
information on  
housing options



**950** offers via Tenancy  
Matching Service including  
**116 YPIRAC**



**400 referrals**  
to Hospital to Home  
supported their  
discharge journey



**1,800**  
people called the SDA  
Advice Line and received  
individual advice



**34 data reports**  
purchased informing  
decisions on new builds



# Directors' report

**The directors present their report, together with the financial statements, on Summer Foundation Limited (Summer Foundation) and controlled entity (the consolidated company) for the year ended 30 June 2023.**

## Directors

The following persons were directors of the consolidated company during the whole of the financial year and up to the date of this report, unless otherwise stated:

- Adam Horsburgh
- Cain Beckett (retired 15 September 2023)
- Caro Llewellyn
- Chris Leptos AO (Chair) - appointed 1 July 2022
- Dean Ireland
- Dr Di Winkler AM
- Michelle Somerville
- Selina Short (retired 26 September 2022)
- Tim Adam

## Principal activities

Summer Foundation is a not-for-profit organisation that aims to resolve the issue of young people in nursing homes. Summer Foundation Limited focuses on conducting practical research, informing and empowering people with disability and their support networks, and developing pragmatic solutions for systemic change.

## Review of operations

Revenue from activities for the year was \$17,284,039 (2022: \$11,021,380). This represents a 57% increase on 2022, predominately due to the growth in our philanthropic grants and progressing our revenue streams within the Housing Hub social enterprise.

A surplus result of \$2,847,653 (2022: a deficit result of \$2,114,890) was achieved in 2023. This surplus is a result of income received and recognised in the financial year 2023, but designated to support activities in the financial year 2024. Under the revenue accounting standards (AASB 15 and AASB 1058) the nature of this income requires it be recognised on receipt, not as spent, resulting in a mismatch between the timing of the revenue recognition and the related expenditure. The surplus achieved in 2023 marks an improvement over the previous year's loss, which was influenced by a one-time investment in critical internal projects in 2022.

A review of our operations, undertaken late in financial year 2023, resulted in the alignment of key housing related services under the Housing Hub social enterprise, and an increased focus on home and living support services while ceasing to provide tenancy matching services.

## Matters subsequent to the end of the financial year

No matter or circumstance has arisen since 30 June 2023 that has significantly affected, or may significantly affect the consolidated company's operations, the results of those operations, or the consolidated company's state of affairs in future financial years.

# Information on directors



**Independent  
Non-Executive Director**

## **Tim Adam**

*Bachelor of Arts/Law*

Tim Adam is a retired lawyer and successful businessman. In his business career he was a long standing Partner of Melbourne law firm, Moores Legal. Throughout his professional career he worked extensively across commercial legal practice, and ethical and social justice issues. Tim was a leading practitioner in personal injury law and employment law.

Among other professional roles, Tim worked as lawyer for Eastern Health Ethics Committee, as a volunteer lawyer for Camberwell Legal Aid, Chairman of Surrey Hills Church of Christ Board, Trustee of Churches of Christ Properties and Corporation Lawyer for Churches of Christ Professional Standards Committee.

Tim is committed to developing young people through social group interaction, sport and a local Church environment. Tim also brings lived experience of disability to the board. Fellow Australian Institute of Company Directors.



**Independent  
Non-Executive Director  
(retired September 2023)**

## **Cain Beckett**

*Fellow Australian Institute of Company Directors*

Cain joined Deloitte in 2022 to focus on risk roles for the health, human services and National Disability Insurance Scheme (NDIS) markets. As the inaugural head of Markets and Pricing for the NDIS, Cain led the implementation of the Scheme's supply-side market infrastructure, including pricing, and national provider benchmarking and analytics.

In 2018, Cain joined the Department of the Prime Minister and Cabinet to co-ordinate work between the social services, human services and veterans affairs portfolios and the Cabinet, before being seconded, at the recommendation of the Prime Minister's Office, as the Special Advisor and head of strategy, to establish the Royal Commission into Violence, Abuse, Neglect and Exploitation of People with Disability.

He is one of the few people in Australia to have held leadership roles across all disability stakeholder groups and was the first NDIS participant to regularly attend Cabinet meetings. He is a former Chair of the NSW Disability Council and former Non-Executive Director of Cerebral Palsy Alliance.

Cain co-founded the Cerebral Palsy Research Foundation and the Attitude Foundation and is a non-executive director of Disabled Wintersports Australia (the NSO for paralympic winter sports).

He is the recipient of the 2020 Australian Academy of Developmental Medicine Outstanding Achievement Award and a Fellow of the Australian Institute of Company Directors.



**Independent  
Non-Executive Director**

## **Adam Horsburgh**

*Bachelor of Arts (Hons), Masters in Social Science,  
Post Grad Dip in Health Services Management*

Adam is the CEO of Austin Health. He has a strong background in operations health service management, both locally and in the UK, with the NHS.

As a graduate of the NHS' Management Training Scheme in the UK, he held a range of operational management roles in the NHS. He worked for PricewaterhouseCoopers Public Sector Consulting Practice, where he undertook financial and operational improvement projects across NHS Trusts and Social Services departments.

Adam spent 8 years at Monash Health in charge of operations at Monash Medical Centre, Moorabbin Hospital, and ambulatory and community-based services. He also held the Executive Portfolio of Strategy and Planning and was the Executive Director for Jessie McPherson Private Hospital.

Before taking up his current role, Adam was the deputy CEO of Melbourne Health and prior to that, Director of Performance and System Design at the Department of Health and Human Services. In this role, Adam was responsible for the monitoring and management of performance across Victoria's 85 health services, including Ambulance Victoria.



**Independent  
Non-Executive Director**

## **Dean Ireland**

*Bachelor of Commerce, Master of Marketing*

Dean Ireland is a Partner with Maritana and works as a consultant, coach and business leader in senior leadership and organisation design. With broad industry exposure, hands on management experience and his international career he brings creativity and selectiveness to his work.

Dean has served listed, private equity, multinational, investment fund, family, government, NGO and NFP organisations. He has advised on chief executive, CFO, senior executive and board succession for many ASX/NZX and private organisations.

Previously Dean was the Melbourne Managing Partner of a global executive search firm where he worked for 15 years. He began his career in management consulting and investment banking before joining Pacific Dunlop in Hong Kong. Later, at General Electric (GE) he held several business development positions, served as the CEO of the Energy and IT divisions in Australia and Head of Strategy with GE's Energy division in the US.

Dean holds a Bachelor of Commerce from the University of Melbourne, a Master of Marketing from Melbourne Business School and formally qualified as a chartered accountant. He has served on the boards of Melbourne Business School and Opportunity International.



**Independent  
Non-Executive Chair**

## **Chris Leptos AO**

*BCom, MBA, FAICD, FCA*

Chris is an experienced company director, and his other board roles include Chairman of Liverty Housing and Non-Executive Director of IDP Education Limited.

In his executive career Chris was Managing Partner Government for Ernst & Young, and global head of Corporate Development for Western Mining.

Chris has undertaken a number of sensitive government reform processes including a recent independent review of social and affordable housing for the Commonwealth. In 2021 he was appointed as the Independent Reviewer for the Food and Grocery Code under the Competition and Consumer Act.

In 2000 Chris was honoured as a Member of the Order of Australia for services to business and the community, and in 2022 was honoured as an Officer of the Order of Australia for services to the not-for-profit sector.



**Independent  
Non-Executive Director**

## **Caro Llewellyn**

*Authentic Leadership (Harvard Business School)*

Caro Llewellyn was CEO of the Wheeler Centre for Books, Writing and Ideas from July 2020 to August 2023. Prior to that, she was Director of Experience and Engagement at Museums Victoria.

Before her executive roles, she was artistic director of several large-scale literary festivals, including the Sydney Writers' Festival, the PEN World Voices Festival chaired by Salman Rushdie in New York, and an international literary festival for Columbia University's campus in Paris.

Caro is the author of 4 works of non-fiction including the 2020 Stella Prize shortlisted memoir, *Diving into Glass*, about her experiences living with disability – her father's and her own.

She is currently working on a novel due to be published in 2024 and developing an App for people living with disability.



**Independent  
Non-Executive Director  
(retired September 2022)**

## Selina Short

*Certificate in Disruptive Strategy (Harvard Business School),  
Master of Commerce, Bachelor of Economics, Diploma of Education*

Selina Short is Ernst & Young's Oceania Real Estate and Construction Managing Partner.

Selina focuses on technological and societal influences that have the power to shape and be shaped by the built environment. She is a vocal champion of placemaking and its role fuelling economic prosperity, livability and sustainability.

Selina is a member of the Property Council of Australia's National Cities Roundtable and the Property CEO Champions of Change, a group of leading CEOs driving action to enhance gender equality in real estate.



**Independent  
Non-Executive Director**

## Michelle Somerville

*Master of Applied Finance, Fellow of the Australian Institute of Company Directors, Chartered Accountant, Bachelor of Business Administration, Fellow at the Governance Institute Australia*

Michelle Somerville is an experienced non-executive director, bringing deep and relevant finance, risk and governance experience to the Board, having worked in the financial services industry in both her executive and non-executive roles.

Michelle has a deep understanding of the business and value drivers with a focus on alignment with purpose and maintaining social licence to operate. She believes in the value of strong governance and improving the quality of financial information and risk management processes to provide greater confidence to stakeholders. Michelle has a goal to use her professional skills to help organisations meet these objectives.

Previously Michelle was an audit partner with KPMG Australia for nearly 14 years, with a focus on the financial services industry in both Australia and overseas. Michelle is currently a non-executive director on the boards of IOOF Holdings, Select Harvests and the Epworth Foundation.



**CEO, Founder and  
Executive Director**

## **Dr Di Winkler AM**

*PhD, GAICD, BAppSc (Occ Ther), Grad Dip Neuroscience,  
Grad Dip AppSc (Comp Sci), Master of Applied Science*

Di Winkler is an occupational therapist who has worked with people with severe brain injury for more than 20 years. Di started a PhD and then established the Summer Foundation in January 2006 after becoming frustrated by the lack of appropriate housing and support for young people with disability who were being admitted to nursing homes for the aged. In 2012 she completed her PhD at Monash University, which involved a series of studies that focused on young people in nursing homes.

In 2018 Di was conferred with a Doctor of Laws honoris causa from Monash University for her distinguished service to the community through her leadership as a practicing occupational therapist and researcher.

In 2019 Di was appointed as a Member of the Order of Australia for significant service to people with disability. Di is the Chief Executive Officer at the Summer Foundation and leads the Research Unit. She has authored more than 40 peer-reviewed journal articles and is an Adjunct Associate Professor at the Living with Disability Research Centre at La Trobe University. Di is also on the board of Summer Housing Ltd (trading as Liverty Housing).

## Meetings of directors

The number of meetings of the consolidated company's Board of Directors ('the Board') held during the year ended 30 June 2023, and the number of meetings attended by each director were:

Director	Eligible to attend	Attended
Adam Horsburgh	5	5
Cain Beckett (retired 15 September 2023)	5	5
Caro Llewellyn	5	3
Chris Leptos AO (Chair) - appointed 1 July 2022	5	5
Dean Ireland	5	4
Dr Di Winkler AM	5	5
Michelle Somerville	5	4
Selina Short (retired 26 September 2022)	1	1
Tim Adam	5	5

## Committees to the board

### Finance and Risk Committee

The Risk & Finance Committee assists the Board to meet its oversight responsibilities in relation to the Summer Foundation's financial reporting, compliance with legal and regulatory requirements, internal control structure, risk management procedures, and the external audit functions.

The following people form this Committee:

- Michelle Somerville (Chair)
- Dean Ireland
- Dan Langelaan (Independent Member)

## Contributions on winding up

In the event of the consolidated company being wound up, ordinary members are required to contribute a maximum of \$100 each. Honorary members are not required to contribute.

The total amount that members of the consolidated company are liable to contribute if the consolidated company is wound up is \$700, based on 7 current ordinary members.

## Auditor's independence declaration

A copy of the auditor's independence declaration as required under section 60-40 of the Australian Charities and Not-for-profits Commission Act 2012 is set out immediately after this directors' report.

On behalf of the directors



**Michelle Somerville**  
Director

25 October 2023  
Melbourne, Australia

**DECLARATION OF INDEPENDENCE BY ELIZABETH BLUNT TO THE DIRECTORS OF SUMMER FOUNDATION LIMITED**

As lead auditor of Summer Foundation Limited for the year ended 30 June 2023, I declare that, to the best of my knowledge and belief, there have been:

1. No contraventions of the auditor independence requirements of section 60-40 of the *Australian Charities and Not-for-profit Commission Act 2012* in relation to the audit; and
2. No contraventions of any applicable code of professional conduct in relation to the audit.

This declaration is in respect of Summer Foundation Limited and the entity it controlled during the period.



**Elizabeth Blunt**  
**Director**

**BDO Audit Pty Ltd**  
Melbourne, 25 October 2023

# Financial report

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## **General information**

The financial statements cover Summer Foundation Limited as a consolidated company consisting of Summer Foundation Limited and the entities it controlled at the end of, or during, the year. The financial statements are presented in Australian dollars, which is Summer Foundation Limited's functional and presentation currency.

Summer Foundation Limited is a not-for-profit unlisted public company limited by guarantee, incorporated and domiciled in Australia. Its registered office and principal place of business are:

### **Registered office**

c/o Saward Dawson Chartered Accountants  
20 Albert Street, Blackburn VIC 3130

## **Principal place of business**

Summer Foundation Limited  
Level 3, 991 Whitehorse Road, Box Hill VIC 3128

During the year, a wholly owned subsidiary, Housing Hub Limited, was incorporated on 7 November 2022 and consolidated into Summer Foundation Limited. Further information at note 19.

A description of the nature of the consolidated company's operations and its principal activities is included in the Directors' Report, which is not part of these financial statements.

The financial statements were authorised for issue, in accordance with a resolution of directors, on 25 October 2023. The directors have the power to amend and reissue the financial statements.

## Summer Foundation Limited and Controlled Entity

### Consolidated statement of profit or loss and other comprehensive income

For the year ended 30 June 2023

	Note	Consolidated 2023 \$	2022 \$
<b>Revenue</b>			
Donations		1,870,133	62,695
Philanthropic grants & projects		12,993,183	9,472,062
Government grants		178,938	494,025
Housing Hub income		1,872,110	888,245
Gifts-in-kind income		201,500	-
Interest income		23,990	2,525
Other income		144,185	101,828
Total revenue		<u>17,284,039</u>	<u>11,021,380</u>
<b>Expenses</b>			
Housing Hub Social Enterprise		(4,529,999)	(4,468,761)
Non-project employee benefits expense		(5,546,989)	(4,424,627)
Project costs		(2,972,185)	(3,498,765)
Depreciation and amortisation expense	3	(400,406)	(227,843)
Event costs		(37,170)	(15,204)
Competitive research grant expenditure		(113,539)	(16,883)
Occupancy expenses		(335,621)	(193,198)
Other expenses		(500,477)	(290,989)
Total expenses		<u>(14,436,386)</u>	<u>(13,136,270)</u>
<b>Surplus/(deficit) before income tax expense</b>		2,847,653	(2,114,890)
Income tax expense		-	-
<b>Surplus/(deficit) after income tax expense for the year</b>		<u>2,847,653</u>	<u>(2,114,890)</u>
Other comprehensive surplus for the year, net of tax		-	-
<b>Total comprehensive surplus/(deficit) for the year</b>		<u><u>2,847,653</u></u>	<u><u>(2,114,890)</u></u>

The above consolidated statement of profit or loss and other comprehensive income should be read in conjunction with the accompanying notes

## Summer Foundation Limited and Controlled Entity

### Consolidated statement of financial position

As at 30 June 2023

	Note	Consolidated 2023 \$	2022 \$
<b>Assets</b>			
<b>Current assets</b>			
Cash and cash equivalents	4	7,262,508	3,672,335
Trade and other receivables	5	771,849	648,863
Prepayments	6	104,597	91,306
Total current assets		<u>8,138,954</u>	<u>4,412,504</u>
<b>Non-current assets</b>			
Trade and other receivables	5	133,662	16,391
Property, plant and equipment	7	120,928	116,839
Right-of-use assets	8	757,076	17,547
Intangibles	9	23,941	167,581
Total non-current assets		<u>1,035,607</u>	<u>318,358</u>
<b>Total assets</b>		<u>9,174,561</u>	<u>4,730,862</u>
<b>Liabilities</b>			
<b>Current liabilities</b>			
Trade and other payables	10	891,930	725,384
Lease liabilities	11	175,668	17,069
Employee benefits	12	933,708	755,896
Deferred revenue	13	480,770	50,001
Total current liabilities		<u>2,482,076</u>	<u>1,548,350</u>
<b>Non-current liabilities</b>			
Lease liabilities	11	622,631	-
Employee benefits	12	182,836	143,147
Total non-current liabilities		<u>805,467</u>	<u>143,147</u>
<b>Total liabilities</b>		<u>3,287,543</u>	<u>1,691,497</u>
<b>Net assets</b>		<u>5,887,018</u>	<u>3,039,365</u>
<b>Equity</b>			
Competitive research grant reserve		134,216	247,755
Accumulated funds		5,752,802	2,791,610
<b>Total equity</b>		<u>5,887,018</u>	<u>3,039,365</u>

The above consolidated statement of financial position should be read in conjunction with the accompanying notes

**Summer Foundation Limited and Controlled Entity**  
**Consolidated statement of changes in equity**

For the year ended 30 June 2023

	Competitive Research Grant Reserve \$	Accumulated funds \$	Total equity \$
Balance at 1 July 2021	264,638	4,889,617	5,154,255
Deficit after income tax expense for the year	-	(2,114,890)	(2,114,890)
Other comprehensive surplus for the year, net of tax	-	-	-
Total comprehensive deficit for the year	-	(2,114,890)	(2,114,890)
Transfer (from)/to reserves	(16,883)	16,883	-
<b>Balance at 30 June 2022</b>	<b>247,755</b>	<b>2,791,610</b>	<b>3,039,365</b>

	Competitive Research Grant Reserve \$	Accumulated funds \$	Total equity \$
Balance at 1 July 2022	247,755	2,791,610	3,039,365
Surplus after income tax expense for the year	-	2,847,653	2,847,653
Other comprehensive surplus for the year, net of tax	-	-	-
Total comprehensive surplus for the year	-	2,847,653	2,847,653
Transfer (from)/to reserves	(113,539)	113,539	-
<b>Balance at 30 June 2023</b>	<b>134,216</b>	<b>5,752,802</b>	<b>5,887,018</b>

*The above consolidated statement of changes in equity should be read in conjunction with the accompanying notes*

## Summer Foundation Limited and Controlled Entity

### Consolidated statement of cash flows

For the year ended 30 June 2023

	Note	Consolidated 2023 \$	2022 \$
<b>Cash flows from operating activities</b>			
Housing Hub income and other project income		1,826,992	1,476,532
Donations		1,870,133	62,695
Government and philanthropic grants		13,602,890	9,966,087
Other receipts		144,185	101,828
Interest received		23,990	2,525
Million Dollar Vax project receipts		-	6,626,399
Million Dollar Vax project payments		-	(6,626,399)
Payments to suppliers and employees		(13,802,487)	(12,592,528)
Net cash from/(used in) operating activities		3,665,703	(982,861)
<b>Cash flows from investing activities</b>			
Payments for property, plant and equipment	7	(68,458)	(57,554)
Net cash used in investing activities		(68,458)	(57,554)
<b>Cash flows from financing activities</b>			
Payment of lease liabilities		(7,072)	(21,972)
Net cash used in financing activities		(7,072)	(21,972)
Net increase/(decrease) in cash and cash equivalents		3,590,173	(1,062,387)
Cash and cash equivalents at the beginning of the financial year		3,672,335	4,734,722
Cash and cash equivalents at the end of the financial year	4	7,262,508	3,672,335

*The above consolidated statement of cash flows should be read in conjunction with the accompanying notes*

## Summer Foundation Limited and Controlled Entity

### Notes to the consolidated financial statements

30 June 2023

#### Note 1. Significant accounting policies

The principal accounting policies adopted in the preparation of the financial statements are set out either in the respective notes or below. These policies have been consistently applied to all the years presented, unless otherwise stated.

##### **New or amended Accounting Standards and Interpretations adopted**

The consolidated company has adopted all of the new or amended Accounting Standards and Interpretations issued by the Australian Accounting Standards Board ('AASB') that are mandatory for the current reporting period.

Any new or amended Accounting Standards or Interpretations that are not yet mandatory have not been early adopted.

##### **Basis of preparation**

These general purpose financial statements have been prepared in accordance with the Australian Accounting Standards - Simplified Disclosures issued by the Australian Accounting Standards Board ('AASB'), the Australian Charities and Not-for-profits Commission Act 2012 and associated regulations, as appropriate for not-for profit oriented entities.

##### **Historical cost convention**

The financial statements have been prepared under the historical cost convention.

##### **Critical accounting estimates**

The preparation of the financial statements requires the use of certain critical accounting estimates. It also requires management to exercise its judgement in the process of applying the consolidated company's accounting policies. The areas involving a higher degree of judgement or complexity, or areas where assumptions and estimates are significant to the financial statements, are disclosed in note 2.

##### **Reclassifications**

Comparative figures where appropriate, have been reclassified to be comparable with the figures presented for the current financial year.

##### **Principles of consolidation**

The consolidated financial statements incorporate the assets and liabilities of controlled entity of Summer Foundation Limited ('company' or 'parent entity') as at 30 June 2023 and the results of its controlled entity for the year then ended.

Summer Foundation Limited and its controlled entity together are referred to in these financial statements as the 'consolidated entity'.

Controlled entity is an entity over which the consolidated entity has control. The consolidated entity controls an entity when the consolidated entity is exposed to, or has rights to, variable returns from its involvement with the entity and has the ability to affect those returns through its power to direct the activities of the entity. Controlled entity is fully consolidated from the date on which control is transferred to the consolidated entity. It is de-consolidated from the date that control ceases.

Intercompany transactions, balances and unrealised gains on transactions between entities in the consolidated entity are eliminated. Unrealised losses are also eliminated unless the transaction provides evidence of the impairment of the asset transferred. Accounting policies of controlled entity has been changed where necessary to ensure consistency with the policies adopted by the consolidated entity.

There were no transactions in Housing Hub Ltd during 2023.

## **Revenue recognition**

The consolidated company recognises revenue as follows:

### ***Housing Hub Income***

Revenue from a contract to provide services is recognised when services are performed or when milestones have been achieved.

### ***Grants, Philanthropic and Project revenue***

The terms and conditions of grants, philanthropic and project revenue are reviewed to determine if the requirements of AASB 1058 Income for Not-for-Profit Entities or AASB 15 Revenue from Contracts with Customers are met. If AASB 15 applies to a transaction or part of a transaction, the consolidated company applies the general principles of this standard to determine the appropriate revenue recognition. Under AASB 15, revenue is recognised when (or as) the performance obligation is satisfied. Any income received where the performance obligation is not yet satisfied as at reporting date, is recorded as deferred income.

Where a grant or other income does not meet the requirements of AASB 15, the consolidated company considers the application of AASB 1058 Income of Not-for-Profit Entities. Under AASB 1058, the asset received will be recognised and measured at fair value in accordance with other applicable Australian Accounting Standards. Upon initial recognition of the asset, this Standard requires the consolidated company to consider whether any other financial statement elements (called 'related amounts') should be recognised.

Under AASB 1058, the consolidated company recognises revenue immediately in the profit and loss for the excess of the initial carrying amount of the asset and the consideration to acquire it after recognising any other related amounts.

### ***Interest***

Interest revenue is recognised as interest accrues using the effective interest method. This is a method of calculating the amortised cost of a financial asset and allocating the interest income over the relevant period using the effective interest rate, which is the rate that exactly discounts estimated future cash receipts through the expected life of the financial asset to the net carrying amount of the financial asset.

### ***Donation income***

Revenue received from donations is brought to account on a cash received basis.

### **Income tax**

As the consolidated company is a charitable institution in terms of subsection 50-5 of the Income Tax Assessment Act 1997, as amended, it is exempt from paying income tax.

### **Goods and Services Tax ('GST') and other similar taxes**

Revenues, expenses and assets are recognised net of the amount of associated GST, unless the GST incurred is not recoverable from the tax authority. In this case it is recognised as part of the cost of the acquisition of the asset or as part of the expense.

Receivables and payables are stated inclusive of the amount of GST receivable or payable. The net amount of GST recoverable from, or payable to, the tax authority is included in other receivables or other payables in the statement of financial position.

Cash flows are presented on a gross basis. The GST components of cash flows arising from investing or financing activities which are recoverable from, or payable to the tax authority, are presented as operating cash flows.

Commitments and contingencies are disclosed net of the amount of GST recoverable from, or payable to, the tax authority.

## **Note 2. Critical accounting judgements, estimates and assumptions**

The preparation of the financial statements requires management to make judgements, estimates and assumptions that affect the reported amounts in the financial statements. Management continually evaluates its judgements and estimates in relation to assets, liabilities, contingent liabilities, revenue and expenses. Management bases its judgements, estimates and assumptions on historical experience and on other various factors, including expectations of future events, management believes to be reasonable under the circumstances. The resulting accounting judgements and estimates will seldom equal the related actual results.

The judgements, estimates and assumptions that have a significant risk of causing a material adjustment to the carrying amounts of assets and liabilities (refer to the respective notes) within the next financial year are discussed below.

#### **Estimation of useful lives of assets**

The consolidated company determines the estimated useful lives and related depreciation and amortisation charges for its property, plant and equipment and finite life intangible assets. The useful lives could change significantly as a result of technical innovations or some other event. The depreciation and amortisation charge will increase where the useful lives are less than previously estimated lives, or technically obsolete or non-strategic assets that have been abandoned or sold will be written off or written down.

#### **Incremental borrowing rate**

Where the interest rate implicit in a lease cannot be readily determined, an incremental borrowing rate is estimated to discount future lease payments to measure the present value of the lease liability at the lease commencement date. Such a rate is based on what the consolidated company estimates it would have to pay a third party to borrow the funds necessary to obtain an asset of a similar value to the right-of-use asset, with similar terms, security and economic environment.

#### **Employee benefits provision**

As noted in note 12, the liability for employee benefits expected to be settled more than 12 months from the reporting date are recognised and measured at the present value of the estimated future cash flows to be made in respect of all employees at the reporting date. In determining the present value of the liability, estimates of attrition rates and pay increases through promotion and inflation have been taken into account.

### **Note 3. Expenses**

	<b>Consolidated 2023</b>	<b>2022</b>
	<b>\$</b>	<b>\$</b>
Surplus/(deficit) before income tax includes the following specific expenses:		
<i>Depreciation expense</i>		
Property, plant and equipment	64,369	65,262
Right-of-use assets	192,397	18,941
Total depreciation	256,766	84,203
<i>Amortisation</i>		
Intangibles	143,640	143,640
Total depreciation and amortisation	400,406	227,843
<i>Finance costs</i>		
Interest and finance charges paid/payable on lease liabilities	56,243	537
<i>Superannuation expense</i>		
Defined contribution superannuation expense	1,008,617	849,293

#### *Finance Costs*

All other finance costs are expensed in the period in which they are incurred.

#### *Defined contribution superannuation expense*

Contributions to defined contribution superannuation plans are expensed in the period in which they are incurred.

## Note 4. Cash and cash equivalents

	Consolidated 2023	2022
	\$	\$
<i>Current assets</i>		
Cash at bank and on hand	7,064,753	3,441,610
Cash account - committed future research funds	197,755	230,725
	<u>7,262,508</u>	<u>3,672,335</u>

### **Accounting policy for cash and cash equivalents**

Cash and cash equivalents includes cash on hand, deposits held at call with financial institutions, other short-term, highly liquid investments with original maturities of three months or less that are readily convertible to known amounts of cash and which are subject to an insignificant risk of changes in value.

Committed future research funds represents amounts earmarked to fund the competitive research grant program.

## Note 5. Trade and other receivables

	Consolidated 2023	2022
	\$	\$
<i>Current assets</i>		
Trade receivables	663,989	291,629
Accrued revenue	23,355	350,597
Portable long service receivables	84,505	6,637
	<u>771,849</u>	<u>648,863</u>
<i>Non-current assets</i>		
Portable long service receivables	133,662	16,391
	<u>905,511</u>	<u>665,254</u>

### **Accounting policy for trade and other receivables**

Trade receivables are initially recognised at fair value and subsequently measured at amortised cost using the effective interest method, less any allowance for expected credit losses. Trade receivables are generally due for settlement within 30 days.

The consolidated company has applied the simplified approach to measuring expected credit losses, which uses a lifetime expected loss allowance. To measure the expected credit losses, trade receivables have been grouped based on days overdue.

Accrued revenue is recognised when the consolidated company has transferred goods or services to the customer but where the consolidated company is yet to establish an unconditional right to consideration.

Portable long service leave receivables are recognised when the consolidated company have paid instalments to the Portable Long Service Leave Authority and can be reclaimed as allowable under relevant state portable long service leave scheme.

## Note 6. Prepayments

	Consolidated 2023	2022
	\$	\$
<i>Current assets</i>		
Prepayments	104,597	91,306

## Note 7. Property, plant and equipment

	Consolidated 2023	2022
	\$	\$
<i>Non-current assets</i>		
Leasehold improvements - at cost	4,841	4,841
Less: Accumulated depreciation	(4,841)	(4,841)
	-	-
Furniture & fixtures - at cost	63,631	63,631
Less: Accumulated depreciation	(41,941)	(37,475)
	21,690	26,156
Computer equipment - at cost	493,654	425,196
Less: Accumulated depreciation	(394,416)	(334,513)
	99,238	90,683
	120,928	116,839

### Reconciliations

Reconciliations of the written down values at the beginning and end of the current financial year are set out below:

	Furniture & Fittings	Computer Equipment	Total
	\$	\$	\$
Balance at 1 July 2022	26,156	90,683	116,839
Additions	-	68,458	68,458
Depreciation expense	(4,466)	(59,903)	(64,369)
Balance at 30 June 2023	21,690	99,238	120,928

### Accounting policy for property, plant and equipment

Plant and equipment is stated at historical cost less accumulated depreciation and impairment. Historical cost includes expenditure that is directly attributable to the acquisition of the items.

Depreciation is calculated on a straight-line or diminishing value basis to write off the net cost of each item of property, plant and equipment (excluding land) over their expected useful lives as follows:

Class of fixed asset	Depreciation rate
Computer equipment	33%
Furniture and fixtures	5% - 10%

The residual values, useful lives and depreciation methods are reviewed, and adjusted if appropriate, at each reporting date.

An item of property, plant and equipment is derecognised upon disposal or when there is no future economic benefit to the consolidated company. Gains and losses between the carrying amount and the disposal proceeds are taken to profit or loss.

## Note 8. Right-of-use assets

	Consolidated 2023	2022
	\$	\$
Non-current assets		
Office equipment	18,048	18,048
Less: Accumulated depreciation	(6,513)	(501)
	11,535	17,547
Boxhill Office	931,926	-
Less: Accumulated depreciation	(186,385)	-
	745,541	-
	757,076	17,547

Additions to the right-of-use assets during the year were \$931,926 and depreciation charged to profit was \$192,397.

### **Accounting policy for right-of-use assets**

A right-of-use asset is recognised at the commencement date of a lease. The right-of-use asset is measured at cost, which comprises the initial amount of the lease liability, adjusted for, as applicable, any lease payments made at or before the commencement date net of any lease incentives received, any initial direct costs incurred, and, except where included in the cost of inventories, an estimate of costs expected to be incurred for dismantling and removing the underlying asset, and restoring the site or asset.

Right-of-use assets are depreciated on a straight-line basis over the unexpired period of the lease or the estimated useful life of the asset, whichever is the shorter. Where the consolidated company expects to obtain ownership of the leased asset at the end of the lease term, the depreciation is over its estimated useful life. Right-of-use assets are subject to impairment or adjusted for any remeasurement of lease liabilities.

## **Note 9. Intangibles**

	<b>Consolidated 2023</b>	<b>2022</b>
	<b>\$</b>	<b>\$</b>
<i>Non-current assets</i>		
Website - at cost	430,921	430,921
Less: Accumulated amortisation	(406,980)	(263,340)
	<u>23,941</u>	<u>167,581</u>
Software - at cost	33,603	33,603
Less: Accumulated amortisation	(33,603)	(33,603)
	<u>-</u>	<u>-</u>
	<u><u>23,941</u></u>	<u><u>167,581</u></u>

### **Reconciliations**

Reconciliations of the written down values at the beginning and end of the current financial year are set out below:

	<b>Website \$</b>
Balance at 1 July 2022	167,581
Additions	-
Amortisation expense	<u>(143,640)</u>
Balance at 30 June 2023	<u><u>23,941</u></u>

### **Website**

Significant costs associated with the development of the revenue generating aspects of the website are deferred and amortised on a straight-line basis over the period of their expected benefit, being their finite life of 3 years.

### **Software**

Significant costs associated with software are deferred and amortised on a straight-line basis over the period of their expected benefit, being their finite life of 2 years.

## Note 10. Trade and other payables

	Consolidated 2023	2022
	\$	\$
Current liabilities		
Trade payables	69,014	150,873
Other payables	822,916	574,511
	<u>891,930</u>	<u>725,384</u>

The consolidated company had no interest bearing liabilities at 30 June 2023 and 30 June 2022.

### **Accounting policy for trade and other payables**

These amounts represent liabilities for goods and services provided to the consolidated company prior to the end of the financial year and which are unpaid. Due to their short-term nature they are measured at amortised cost and are not discounted. The amounts are unsecured and are usually paid within 60 days of recognition.

## Note 11. Lease liabilities

	Consolidated 2023	2022
	\$	\$
Current liabilities		
Lease liability	175,668	17,069
Non-current liabilities		
Lease liability	622,631	-
	<u>798,299</u>	<u>17,069</u>

### **Accounting policy for lease liabilities**

A lease liability is recognised at the commencement date of a lease. The lease liability is initially recognised at the present value of the lease payments to be made over the term of the lease, discounted using the interest rate implicit in the lease or, if that rate cannot be readily determined, the consolidated company's incremental borrowing rate. Lease payments comprise of fixed payments less any lease incentives receivable, variable lease payments that depend on an index or a rate, amounts expected to be paid under residual value guarantees, exercise price of a purchase option when the exercise of the option is reasonably certain to occur, and any anticipated termination penalties. The variable lease payments that do not depend on an index or a rate are expensed in the period in which they are incurred.

Lease liabilities are measured at amortised cost using the effective interest method. The carrying amounts are remeasured if there is a change in the following: future lease payments arising from a change in an index or a rate used; residual guarantee; lease term; certainty of a purchase option and termination penalties. When a lease liability is remeasured, an adjustment is made to the corresponding right-of use asset, or to profit or loss if the carrying amount of the right-of-use asset is fully written down.

## Note 12. Employee benefits

	Consolidated 2023	2022
	\$	\$
<i>Current liabilities</i>		
Annual leave	769,176	665,146
Long service leave	164,532	90,750
	<u>933,708</u>	<u>755,896</u>
<i>Non-current liabilities</i>		
Long service leave	182,836	143,147
	<u>1,116,544</u>	<u>899,043</u>

### **Accounting policy for employee benefits**

#### *Short-term employee benefits*

Liabilities for wages and salaries, including non-monetary benefits, annual leave and long service leave expected to be settled wholly within 12 months of the reporting date are measured at the amounts expected to be paid when the liabilities are settled.

#### *Other long-term employee benefits*

The liability for annual leave and long service leave not expected to be settled within 12 months of the reporting date are measured at the present value of expected future payments to be made in respect of services provided by employees up to the reporting date using the projected unit credit method. Consideration is given to expected future wage and salary levels, experience of employee departures and periods of service. Expected future payments are discounted using market yields at the reporting date on corporate bonds with terms to maturity and currency that match, as closely as possible, the estimated future cash outflows.

## Note 13. Deferred revenue

	Consolidated 2023	2022
	\$	\$
<i>Current liabilities</i>		
Deferred revenue	<u>480,770</u>	<u>50,001</u>

### **Accounting policy for deferred revenue**

Deferred revenue represents the amount of funds invoiced or received where the consolidated company has yet to deliver specified services or fulfil certain conditions.

## Note 14. Key management personnel disclosures

Key management personnel compensation is related to those employees who sit on the Executive Committee having authority and responsibility for planning, directing and controlling the activities of the consolidated company.

### **Compensation**

The aggregate compensation made to directors and other members of key management personnel of the consolidated company is set out below:

	Consolidated 2023	2022
	\$	\$
Aggregate compensation	1,138,761	845,675

## Note 15. Related party transactions

### **Key management personnel**

Disclosures relating to key management personnel are set out in note 14.

### **Transactions with related parties**

Entities related to Director Di Winkler have provided funding of \$14,102,183 (2022: \$8,700,000). In addition, the consolidated company has an office lease agreement with an entity related to Director Di Winkler for a five-year lease term. The new lease is also connected with Di and an in-kind donation has been received to offset the rental payments, which has been included in the funding amount disclosed above.

### **Loans to/from related parties**

There were no loans to or from related parties at the current and previous reporting date.

## Note 16. Contingent assets

The consolidated company had no contingent assets as at 30 June 2023 and 30 June 2022.

## Note 17. Contingent liabilities

The consolidated company had no contingent liabilities as at 30 June 2023 and 30 June 2022.

## Note 18. Commitments

	Consolidated 2023	2022
	\$	\$

Committed at the reporting date but not recognised as liabilities, payable:

Within one year	-	1
-----------------	---	---

The operating lease commitment is in relation to the property lease for the Box Hill premises (expired on 5 October 2022). The Box Hill premises was subject to a peppercorn lease at the cost of \$1 per annum. A new lease agreement was signed in the current year for a term of five-years and has been accounted for under the requirements of AASB 16 Leases.

## Note 19. Interests in subsidiaries

The consolidated financial statements incorporate the assets, liabilities and results of the following subsidiary in accordance with the accounting policy described in note 1:

Name	Principal place of business / Country of incorporation	Ownership interest	
		Consolidated	2022
		2023	%
Housing Hub Ltd	Australia	100.00%	-

## Note 20. Competitive research grant

The final payment for a research project with Macquarie University was made in April 2023 and a commitment for a research project with Outcome Health ended in 2023, following completion of the project. For the year ended 30 June 2023, a further \$113,539 of these project amounts has been paid.

## Note 21. Events after the reporting period

No matter or circumstance has arisen since 30 June 2023 that has significantly affected, or may significantly affect the consolidated company's operations, the results of those operations, or the consolidated company's state of affairs in future financial years.



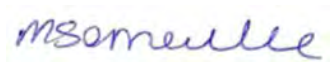
# Directors' declaration

In the directors' opinion:

- the attached financial statements and notes comply with the Australian Accounting Standards - Simplified Disclosures, the Australian Charities and Not-for-profits Commission Act 2012 and associated regulations and other mandatory professional reporting requirements;
- the attached financial statements and notes give a true and fair view of the consolidated company's financial position as at 30 June 2023 and of its performance for the financial year ended on that date; and
- there are reasonable grounds to believe that the consolidated company will be able to pay its debts as and when they become due and payable.

Signed in accordance with a resolution of directors.

On behalf of the directors



**Michelle Somerville**  
Director

25 October 2023  
Melbourne, Australia

## INDEPENDENT AUDITOR'S REPORT

To the members of Summer Foundation Limited

### Report on the Audit of the Financial Report

#### Opinion

We have audited the financial report of Summer Foundation Limited (the registered entity) and its subsidiaries (the Group), which comprises the consolidated statement of financial position as at 30 June 2023, the consolidated statement of profit or loss and other comprehensive income, the consolidated statement of changes in equity and the consolidated statement of cash flows for the year then ended, and notes to the financial report, including a summary of significant accounting policies, and the directors' declaration.

In our opinion the accompanying financial report of Summer Foundation Limited, is in accordance with Division 60 of the *Australian Charities and Not-for-profits Commission Act 2012*, including:

- (i) Giving a true and fair view of the Group's financial position as at 30 June 2023 and of its financial performance for the year then ended; and
- (ii) Complying with Australian Accounting Standards - Simplified Disclosures and Division 60 of the *Australian Charities and Not-for-profits Commission Regulations 2022*.

#### Basis for opinion

We conducted our audit in accordance with Australian Auditing Standards. Our responsibilities under those standards are further described in the *Auditor's responsibilities for the audit of the Financial Report* section of our report. We are independent of the Group in accordance with the auditor independence requirements of the *Australian Charities and Not-for-profits Commission Act 2012* (ACNC Act) and the ethical requirements of the Accounting Professional and Ethical Standards Board's APES 110 *Code of Ethics for Professional Accountants (including Independence Standards)* (the Code) that are relevant to our audit of the financial report in Australia. We have also fulfilled our other ethical responsibilities in accordance with the Code.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

#### Other information

The responsible entities of the registered entity are responsible for the other information. The other information obtained at the date of this auditor's report is information included in the directors' report, but does not include the financial report and our auditor's report thereon.

Our opinion on the financial report does not cover the other information and accordingly we do not express any form of assurance conclusion thereon.

In connection with our audit of the financial report, our responsibility is to read the other information and, in doing so, consider whether the other information is materially inconsistent with the financial report or our knowledge obtained in the audit or otherwise appears to be materially misstated.

If, based on the work we have performed on the other information obtained prior to the date of this auditor's report, we conclude that there is a material misstatement of this other information, we are required to report that fact. We have nothing to report in this regard.

#### **Responsibilities of responsible entities for the Financial Report**

The responsible entities of the registered entity are responsible for the preparation and fair presentation of the financial report in accordance with Australian Accounting Standards - Simplified Disclosures and the ACNC Act, and for such internal control as the responsible entities determine is necessary to enable the preparation of the financial report that is free from material misstatement, whether due to fraud or error.

In preparing the financial report, responsible entities are responsible for assessing the Group's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless the responsible entities either intends to liquidate the Group or to cease operations, or has no realistic alternative but to do so.

The responsible entities of the registered entity are responsible for overseeing the Group's financial reporting process.

#### **Auditor's responsibilities for the audit of the Financial Report**

Our objectives are to obtain reasonable assurance about whether the financial report as a whole is free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance, but is not a guarantee that an audit conducted in accordance with the Australian Auditing Standards will always detect a material misstatement when it exists. Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of this financial report.

A further description of our responsibilities for the audit of the financial report is located at the Auditing and Assurance Standards Board website (<http://www.auasb.gov.au/Home.aspx>) at:

[http://www.auasb.gov.au/auditors\\_responsibilities/ar3.pdf](http://www.auasb.gov.au/auditors_responsibilities/ar3.pdf)

This description forms part of our auditor's report.

**BDO Audit Pty Ltd**



Elizabeth Blunt  
Director

Melbourne, 25 October 2023



# Our supporters

The Summer Foundation warmly thanks the organisations and individuals that have supported our work through grants, fundraising and in-kind support.

## **Organisations**

Good2Give

Thinktank

## **Donors and bequests**

Darren Wilcox

Tania Lang

Diane and Graham Cowley

Estate of John Henry Kilian Brunner

C Roberts

Richard Marufu

John M Darrow

Mark Hooper

Greg Thomas

Patricia Hurley

## **Trusts and Foundations**

The WCF Thomas Charitable Trust

Rees Family Foundation

The Cranwell Family Trust No. 2

## **Government**

NDIS OT Community of Practice

Department of Health, Victorian Government

NDIS Quality and Safeguards Commission

# Research outputs

July 2022 – June 2023

## Journal articles

Banaszak-Holl, J., Morello, R., Sze-Ee, S., Cameron, P., Brown, M., Mitsch, V., Moubarak, R., and Winkler, D. (2022). Do young people with neurological conditions in residential aged care use hospitals differently than those in the community? Evidence from Victorian hospital data, 2014–2017. *Health and Social Care in the Community*. [🌐 onlinelibrary.wiley.com/doi/epdf/10.1111/hsc.14022](https://onlinelibrary.wiley.com/doi/epdf/10.1111/hsc.14022)

Cvejic, R., Watkins, T., Walker, A., Reppermund, S., Srasuebkul, P., Draper, B., Withall, A., Winkler, D., Honan, I., Mackechnie, D., Trollor, J. (2022). Factors associated with discharge from hospital to residential aged care for younger people with neuropsychiatric disorders: An exploratory case-control study using linked data in New South Wales, Australia. [🌐 bmjopen.bmj.com/content/12/12/e065982](https://bmjopen.bmj.com/content/12/12/e065982)

Currie, S., Douglas, J., and Winkler, D. (2022). 'What's next?' The journey from hospital to community engagement from the perspectives of adults following severe acquired brain injury: A scoping review protocol. *BMJ Open*. [🌐 bmjopen.bmj.com/content/12/9/e064226.full](https://bmjopen.bmj.com/content/12/9/e064226.full)

D'Cruz, K., Antonopoulos, S., Rothman, R., Douglas, J., Winkler, D., & Oliver, S. (2022). Co-designing with adults with acquired neurological disability in the community: A scoping review protocol. *BMJ Open*. [🌐 bmjopen.bmj.com/content/bmjopen/12/12/e064921.full.pdf](https://bmjopen.bmj.com/content/bmjopen/12/12/e064921.full.pdf)

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Douglas, J., Winkler, D., McLeod, A., Oliver, S., Gardner, K., Supple, J., & Pearce, C. (2023). Primary healthcare needs and service utilisation of people with disability: A data linkage protocol. [🌐 bmjopen.bmj.com/content/13/4/e068059](https://bmjopen.bmj.com/content/13/4/e068059)

Oliver, S., Douglas, J., Winkler, D., Pearce, C., Minter, E., Jarman, H. K., and Topping, M. (2022). The healthcare needs and general practice utilization of people with acquired neurological disability and complex needs: A scoping review. *Health Expectations*. [🌐 onlinelibrary.wiley.com/doi/epdf/10.1111/hex.13640](https://onlinelibrary.wiley.com/doi/epdf/10.1111/hex.13640)

Topping, M., Douglas, J., & Winkler, D. (2022). "You're supporting the whole person": A grounded theory study of quality support according to close others of people with neurological disability. *Neuropsychological Rehabilitation* [🌐 doi.org/10.1080/09602011.2022.2153149](https://doi.org/10.1080/09602011.2022.2153149)

Topping, M., Douglas, J., Winkler, D. (2022). "Let the people you're supporting be how you learn": A grounded theory study on quality support from the perspective of disability support workers. *Disability and Rehabilitation*. [🌐 tandfonline.com/doi/full/10.1080/09638288.2022.2148300](https://tandfonline.com/doi/full/10.1080/09638288.2022.2148300)

## Reports

Rathbone, A., Dwyer, H., Winkler, D., & Mulherin, P. (2023). Reimagining group housing and living: Workshop findings and recommendations. Housing Hub and Summer Foundation. [🌐 housinghub.org.au/resources/article/reimagining-shared-housing-and-living-report](https://housinghub.org.au/resources/article/reimagining-shared-housing-and-living-report)

Rothman, R., Wellecke, C., Rathbone, A., Winkler, D. & Aimers, N. (2022). Housing seeker snapshot: November. Housing Hub and Summer Foundation. [🌐 housinghub.org.au/resources/article/housing-hub-data-snapshot-housing-seekers](https://housinghub.org.au/resources/article/housing-hub-data-snapshot-housing-seekers)

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Wellecke, C., Robertson, J., Rathbone, A., Winkler, D., Rothman, R. and Aimers, N. (2022). Housing Hub listings snapshot: August. Housing Hub and Summer Foundation. [🌐 housinghub.org.au/resources/article/housing-hub-data-snapshot-listings](https://housinghub.org.au/resources/article/housing-hub-data-snapshot-listings)

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## Opinion Pieces

Brown, M., Winkler, D., "Everyone is talking about the NDIS – we spoke to participants and asked them how to fix it", published online on The Conversation, November 2022. [🌐 theconversation.com/everyone-is-talking-about-the-ndis-we-spoke-to-participants-and-asked-them-how-to-fix-it-193524](https://theconversation.com/everyone-is-talking-about-the-ndis-we-spoke-to-participants-and-asked-them-how-to-fix-it-193524)

Topping, M., Douglas, J., "They treat you like a person, they ask you what you want': what NDIS participants value in support workers", published online on The Conversation, September 2022. [🌐 theconversation.com/they-treat-you-like-a-person-they-ask-you-what-you-want-what-ndis-participants-value-in-support-workers-189545](https://theconversation.com/they-treat-you-like-a-person-they-ask-you-what-you-want-what-ndis-participants-value-in-support-workers-189545)

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## Conferences and presentations

Cubis, L., McDonald, S., Dearn, E., Winkler, D., Douglas, J. (2023). Factors That influence the Quality of Support Coordination for People with Neurological Disability and Complex Needs: A Scoping Review. 46th ASSBI Brain Impairment Conference. Darwin, Australia.

D'Cruz, K., Rothman, R., Antonopoulos, S., Douglas, J., Winkler, D., Oliver, S. (2023). Co-designing with Adults with Acquired Neurological Disability in the Community: A Scoping Literature Review. 46th ASSBI Brain Impairment Conference. Darwin, Australia.

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Douglas, J., Winkler, D. (2023). "Having moved and being able to be quite independent." Outcomes over two years for people with neurological disability and complex needs after moving into new individualised apartments. 46th ASSBI Brain Impairment Conference. Darwin, Australia.

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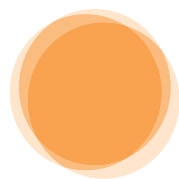
Oliver, S., Winkler, D., Douglas, J., McLeod, A., Rothman, R. (2023). Primary health care needs and service utilisation of NDIS participants with stroke and acquired brain injury (2023). 46th ASSBI Brain Impairment Conference. Darwin, Australia.

Ramme, R., Cubis, L., Winkler, D., Douglas, J. Using an Action Research Methodology to Develop a Rapid Response Service Supporting People with Neurological Disability to Discharge Home From Hospital. (2023). 46th ASSBI Brain Impairment Conference. Darwin, Australia.

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