Specialist Disability Accommodation Supply in Australia

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Specialist Disability Accommodation **Supply in Australia**

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CITATION GUIDE

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DISCLAIMERS

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Acronyms

ABS	Australian Bureau of Statistics
SDA	Specialist Disability Accommodation
SIL	Supported Independent Living
NDIA	National Disability Insurance Agency
NDIS	National Disability Insurance Scheme

Executive Summary

This report provides a comprehensive summary of the current supply of Specialist Disability Accommodation (SDA) in Australia. A national survey of SDA providers[1] was undertaken in August 2021. Building on previous iterations of the *Specialist Disability Accommodation - Supply in Australia* reports[2] this survey collected data about new SDA in the development pipeline.[3]

The National Disability Insurance Scheme (NDIS) provides housing payments for people with disability with an extreme functional impairment and/or very high support needs which means they need housing with features that are not available in the mainstream housing market. This housing payment, as well as the bricks-and-mortar dwelling, is called SDA. Despite commencing in 2016, SDA funding is currently only being paid to 53% of the 30,000 NDIS participants expected to be eligible for SDA. The 14,000 remaining people who are expected to be eligible for SDA funding are likely to be living in government housing, hostels, residential aged care, or with family. Along with this unmet demand, there is a need to replace existing old stock with contemporary SDA. This means the real demand for new housing could be considerably higher than 14,000 places over the next 10 years, as current SDA tenants in basic and legacy housing look for alternative housing. Therefore, urgent work by the NDIA is required to activate demand by increasing the number of NDIS participants with SDA in their plans to the expected goal of 30,000 people.

Understanding the pipeline of supply of new housing is critical to supporting SDA market development. The National Disability Insurance Agency (NDIA) provides supply data for in-kind and enrolled SDA, but only limited information on SDA in development. Therefore, this survey offers insights into the SDA pipeline across Australia in 2021, and combines the survey results with the data published by the NDIA to provide the market with an estimate of the supply pipeline. This report also provides insights into the experiences of SDA providers. This includes their views about the SDA market as a whole, as well as plans they may have to develop further SDA.

[1] Survey participants were SDA providers and developers. Throughout the report, the term 'providers' will be used when referring to the participant sample.
[2] Published in March 2019, March 2020, January 2021.
[3] Pipeline projects include those from the stage of land secured through to completed dwellings not yet enrolled.

Key findings

In total, 75[4] SDA providers responded to the survey, and 59[5] provided pipeline data. This data revealed:

- 2,366 places in SDA are under development, across 1,661 dwellings
- Three-quarters of all places are being developed in Queensland (28.8%), New South Wales (24.7%), and Victoria (23.6%)
- One in two places (51%) will be in dwellings for 1 resident
- 7.2% of places will be in dwellings for 5 or more residents
- Two-thirds (66.7%) of places are in the High Physical Support design category, followed by Robust (14.5%), Fully Accessible (11.5%) and Improved Liveability (7.1%)
- Three-quarters of places will be available for occupancy within the next 12 months
- More than half of places are being developed by private housing providers

In addition to providing data on their development pipelines, providers who participated in the survey were also asked a series of questions about the resources they use to inform build decisions and source tenants. Providers were also asked to rate their level of confidence in the SDA market, with 40.3% indicating that they are very or slightly unconfident. Reasons for this lack of confidence were sought in the survey, revealing key themes:

- Issues with SDA funding approvals for potential tenants
- Problems with activation of demand and supply
- Financial concerns
- Frequent changes and a lack of direction from the NDIA

On the other hand, the 45.2% of providers who expressed confidence in the market reflected on the persistently strong demand for SDA nationally, as well as improvements to NDIA policies and processes aiding navigation of SDA eligibility and payments. Together, these qualitative findings suggest that while many providers appreciate the strengths of the SDA market, others perceive ongoing issues which may impact their ability to provide SDA in the future. This represents an opportunity for greater market stewardship from the NDIA, including closer collaboration and communication with SDA providers to ensure the ongoing confidence in the SDA market.

The findings from this survey show a more even spread of development activity across Australia than in previous years. Apartments are the dominant building type being developed, indicating that the SDA market continues to move away from larger settings that accommodate 4-5 residents, such as group homes. However, the proportion of villas/duplexes/townhouses and houses being developed has increased compared with previous surveys. The number of places in High Physical Support SDA has increased from previous surveys by almost 40%, and the number of places in Robust SDA has more than tripled. This finding is welcome, given that the Robust design category has been the least common design category to be developed in the pipeline since 2018. There was also a slight increase in the number of places in Fully Accessible SDA and a slight decrease in the number of places in Improved Liveability SDA compared to previous years.

[4] Of these 75 providers, 13 providers reported that they did not have a current pipeline and therefore, were not required to complete the survey apart from reporting future plans to develop SDA. This resulted in a total of 62 providers completing the majority of survey questions.

[5] The total of 59 providers includes 48 providers who completed the current survey plus 11 providers who completed the 2020 survey but not the current survey whose pipeline was still relevant.

Table 1 – Estimated number of SDA dwellings and places in development as at August 2021

State	Dwellings	Places
NSW	408	585
VIC	416	559
QLD	462	681
WA	248	384
SA	64	68
TAS	27	47
ACT	30	30
NT	6	12
TOTAL	**1,661**	**2,366**

Introduction

Specialist Disability Accommodation (SDA) is intended to provide eligible participants with housing that increases their independence and maximises social and economic participation, while delivering value for money. A well-designed home in the right location can allow for more independent living arrangements, increased community connection and access to informal supports (NDIA, 2019). The SDA model of funding is designed to create a demand-driven market where individuals can make decisions about the property they will access with the SDA funding allocated in their National Disability Insurance Scheme (NDIS) plans.

The National Disability Insurance Agency (NDIA) estimates that up to 30,000 people with disability will be receiving SDA payments by 2025 (Senate Community Affairs Legislation Committee). The SDA market has the potential to stimulate between $5-10 billion in private sector investment (PricewaterhouseCoopers and Summer Foundation, 2017; Madhavan et al., 2021). However, by mid-2021 only 16,033 people were receiving SDA payments, and only $204 million of the $700 million annual budget had been allocated in NDIS participants' plans (NDIA, 2021). Urgent action is required by the NDIA to activate demand and therefore increase the number of NDIS participants with SDA in their plan.

In order for registered SDA providers to be eligible to receive payments, dwellings must be enrolled with the NDIA, and tenanted by an NDIS participant with SDA funding in their plan. As of June 2021, there were 346 SDA providers who have ever been active, and 264 who had been active in the last quarter of 2020/21 (NDIA, 2021). Also, there were over 18,600 SDA places enrolled with the NDIA, including 'in-kind' arrangements with state and territory governments (NDIA, 2021).

SDA design categories and building types

To enrol an SDA property with the NDIA, SDA providers submit information on the design category, building type, number of bedrooms, and location of the dwelling (NDIA, 2020).

New build SDA dwellings are enrolled with the NDIA in 1 of 4 design categories. Older SDA properties that don't have any special design features may be enrolled as 'Basic', but this category is not available for new build SDA. Design categories for new build SDA are:

Improved Liveability – For tenants who find it difficult to see or understand things around them. Improved Liveability SDA is easy to move around in. Doorways, handles and switches are easy to see and it's often easy to see from one room through to the next.

Fully Accessible – For tenants with significant physical disability. Most often, people who are eligible for Fully Accessible SDA use a wheelchair to get around some or all of the time. There are no steps in a Fully Accessible home. Doorways are wide enough for a wheelchair. The bathroom is designed to be used by people who are sitting as well as standing and the kitchen often is too.

High Physical Support – For tenants who most often use an electric wheelchair to get around and/or a hoist to get in and out of bed and who need many hours of support every day. A High Physical Support home has all the features of Fully Accessible SDA, plus emergency back-up power and a ceiling that is strong enough for a ceiling hoist. It will often have an intercom that connects the tenant to a support worker who is close by. It may also have assistive technology that suits the needs of the tenant – this could include doors, lights and heating that can be controlled with your voice or a device.

Robust – For tenants who sometimes act in a way that may not be safe for them or the people around them. The walls, windows and other fittings in a Robust home aren't easily broken. Robust homes have good sound-proofing, so that sounds from outside don't upset the tenants and so that any noise the tenants make doesn't impact adjoining properties. The doors and windows are secure. A Robust home will also have a space where tenants or staff can go to keep safe.

In addition to their design category, SDA must be enrolled as one of the following building types:

Apartments – self-contained units that are part of a larger building complex.

Duplexes, Villas, Townhouses – semi-attached properties within a single land title.

Houses – detached low rise dwellings with gardens or courtyards.

Group Homes – houses that hold up to five residents.

Larger Dwellings – properties that house more than five long-term residents. This is also called 'Legacy'. Larger dwellings are only for participants who already lived in this type of dwelling, before their first NDIS plan.

Aim

The aim of this report is to provide a comprehensive summary of SDA supply in Australia, incorporating pipeline, in-kind and enrolled data. From 1st July 2021, it became mandatory for SDA providers or future SDA providers to inform the NDIA at the design stage of any proposed SDA dwellings (NDIS, 2021). Given this data collected by the NDIS is relatively new and somewhat restricted by the stage of development (i.e., the design stage), more information about SDA in development was needed. Therefore, this survey intends to offer insights into SDA dwellings in the pipeline within Australia in 2021, ranging from land secured, to waiting for building and/or finance approval to construction completed, or pending enrollment with the NDIA. The survey also provides insights into the experience of SDA providers, including their views about the SDA market and plans to develop more SDA dwellings beyond their current pipeline.

Method

In order to survey SDA providers across Australia, the distribution list from previous supply surveys was updated from multiple sources, including the NDIA's list of registered SDA providers and Housing Hub housing providers. The survey link was sent to SDA providers in July 2021 and remained open for four weeks (closing mid-August 2021). Survey questions were substantially similar to those asked in previous surveys, with a few additional questions asked in relation to SDA market confidence, property and tenancy management and SDA policy.

Depending on the size of a provider's pipeline, it was estimated that survey would take 20 minutes to complete. All providers were advised that their responses would be treated with strict commercial-in-confidence and that all identifying information would be removed. Providers were also given the option to save their responses and return to the survey at a later time if they preferred.

Limitations

There are some limitations in the data presented which should be taken into account when reading this report. This survey is voluntary and therefore not all SDA providers would have participated. It is difficult to estimate the share of SDA providers captured. The NDIA (2021) reported that there were 264 SDA providers who had been active in the last quarter of 2020/21. As active providers only include those with enrolled dwellings who are operating existing SDA, this number is not an indicator of the number of providers who may be developing new SDA. Our approach to ensuring a high participation rate was to approach all SDA providers that have an account with the Housing Hub as well as all providers who have previously participated in the survey. We also used the reach of an industry peak body – PowerHousing Australia – to encourage their members to contribute. The SDA Alliance was also approached to promote the survey to members.

We believe this has resulted in data that is representative of a large portion of the SDA market and the number of participants has increased slightly from past years (October 2021: 75 responses, January 2021: 57 responses, March 2020: 52 responses, March 2019: 55 responses). Another limitation to consider is that pipelines reported are taken on face value and we do not require evidence that a contract is in place. While this survey has not captured all of the SDA in development, there is also some SDA in the pipeline that may not reach enrolment stage with the NDIA. We do require at least an address to be known and the provider to say they have entered into a contract in order for pipeline data to be counted. We have seen numerous examples of SDA projects that are in pipelines that do not eventuate, so one should assume that not all of the places reported will make it to enrolment with the NDIA. This can occur for various reasons along the development life cycle.

Results: Provider Experiences

A total of 75 providers were involved in this year's survey. Of these 75 providers, 13 providers reported that they did not have a current pipeline and therefore, were not required to complete the survey apart from reporting future plans to develop SDA. This resulted in a total of 62 providers completing the majority of survey questions.

Of these 62 providers, 14 providers (who reported they have a current pipeline) did not upload the details of their pipeline to the survey. Therefore, pipeline data was initially based on the responses of 48 providers who completed the current survey. However, it is important to note that the pipeline data from the previous survey was also included in the SDA supply pipeline section of the current report, only if it wasn't reported this time, and was still considered to be under development (refer to Appendix A for a detailed description). This resulted in adding the pipeline details of 11 providers, who completed the 2020 survey but not the current survey. Therefore, the 'SDA supply pipeline' section of this report is based on the responses of 59 providers (i.e. 48 providers from the current survey, plus 11 providers from the previous survey who did not complete the current survey). Refer to Appendix B for a list of all providers who agreed to be named in this report. This list also includes providers from the 2020 survey whose pipeline data was added.

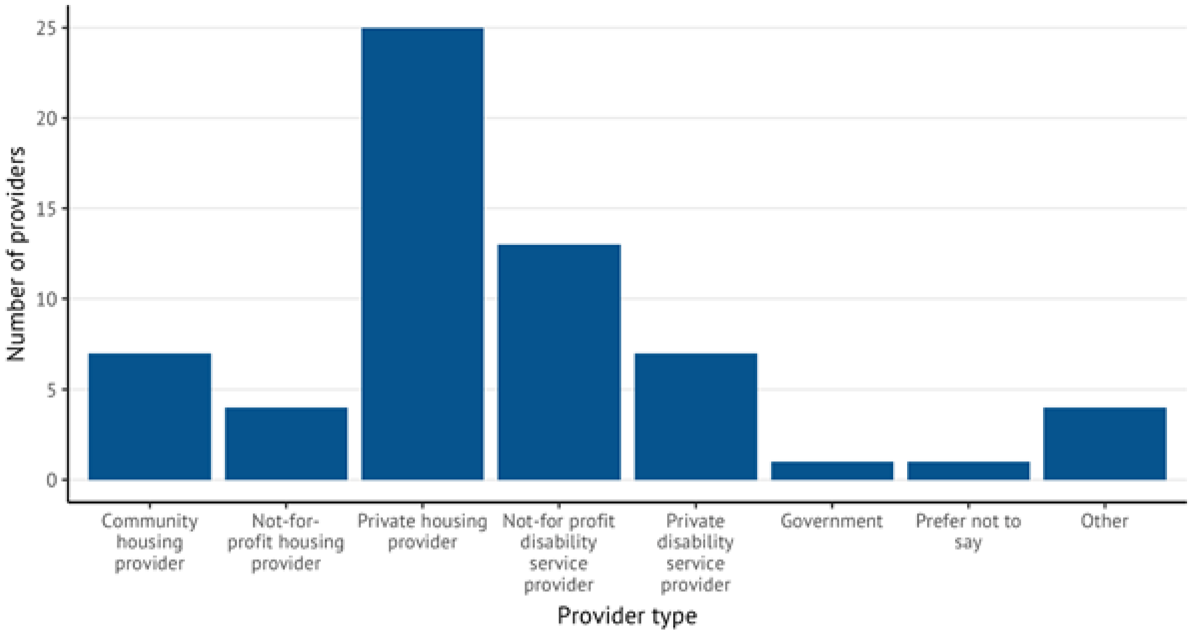
The descriptive statistics for each section of the survey will now be discussed.

Provider demographics

Within Australia, there are several different types of organisations or individuals providing SDA. Of the providers who participated in this survey, 40.3% were private housing providers, followed by 21.0% not-for-profit disability service providers. There were four providers who selected 'other', for which their responses included 'private developer', 'private company providing SDA', 'social impact' and 'private property management'. Refer to Figure 1 for an overview of all provider types. Furthermore, at least 50% of respondents have been providing SDA for 30 months or more.[6]

[6] The maximum number of months a provider could have been developing SDA is 64 months, based on the survey closing date being August 2021.

Figure 1 - Types of providers developing SDA in Australia (n = 62)



Resources that providers are using

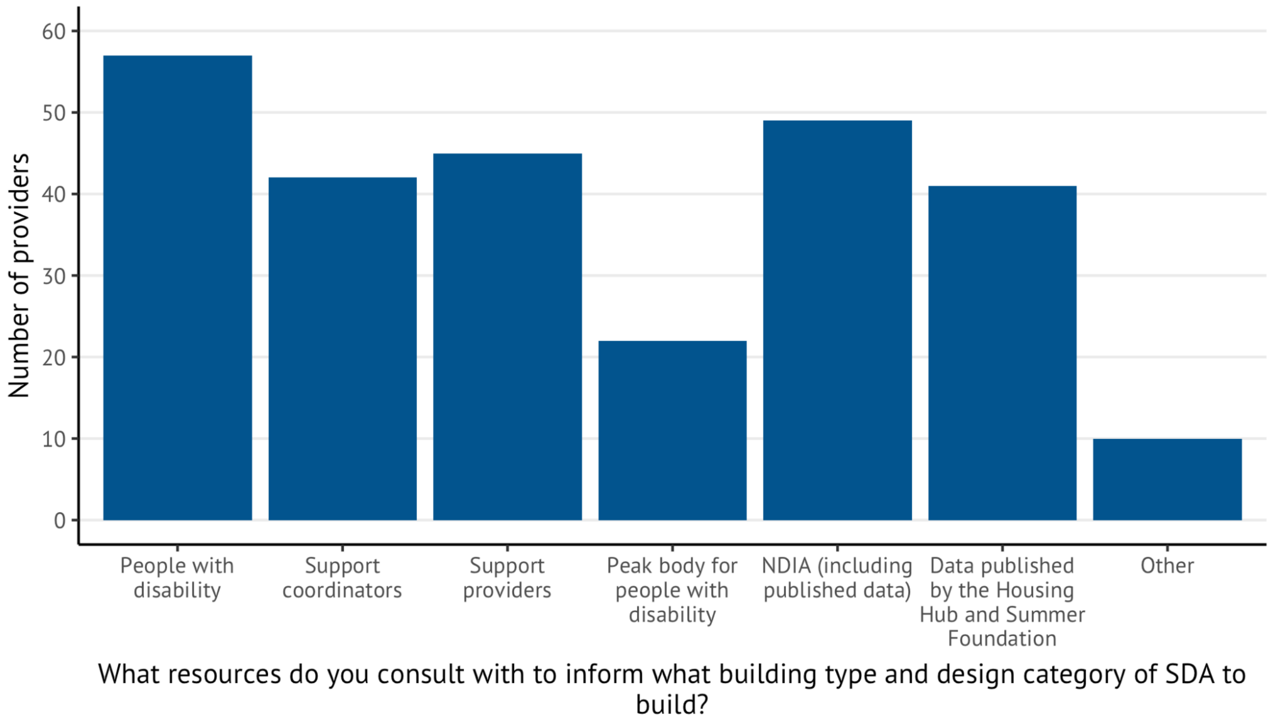
Resources used to decide building type, design category and location

When asked about which groups of people were consulted to inform what building type and design category to build, the vast majority of the providers reported that they engaged with people with disability (91.9%), followed by the NDIA (including published data; 79.0%), support providers (72.6%), support coordinators (67.7%) and data published by the Housing Hub and Summer Foundation (66.1%). Refer to Figure 2. A similar trend was found for the consultation of groups to inform the location of the build, with people with disability (83.9%) consulted with the most, followed by support coordinators (75.8%), the NDIA[7] (including published data; 71.0%), support providers (67.7%), and data published by the Housing Hub and Summer Foundation (56.5%). Refer to Figure 3.

The findings also reveal that providers do not rely on one group of people to inform their decisions. Specifically, providers on average, consulted with 4.3 different groups of people to inform what building type and decision category to build (*SD* = 1.6, n = 62, range = 1-7) and 3.9 groups of people to inform the location of the build (*SD* = 1.7, n = 62, range 1-7).

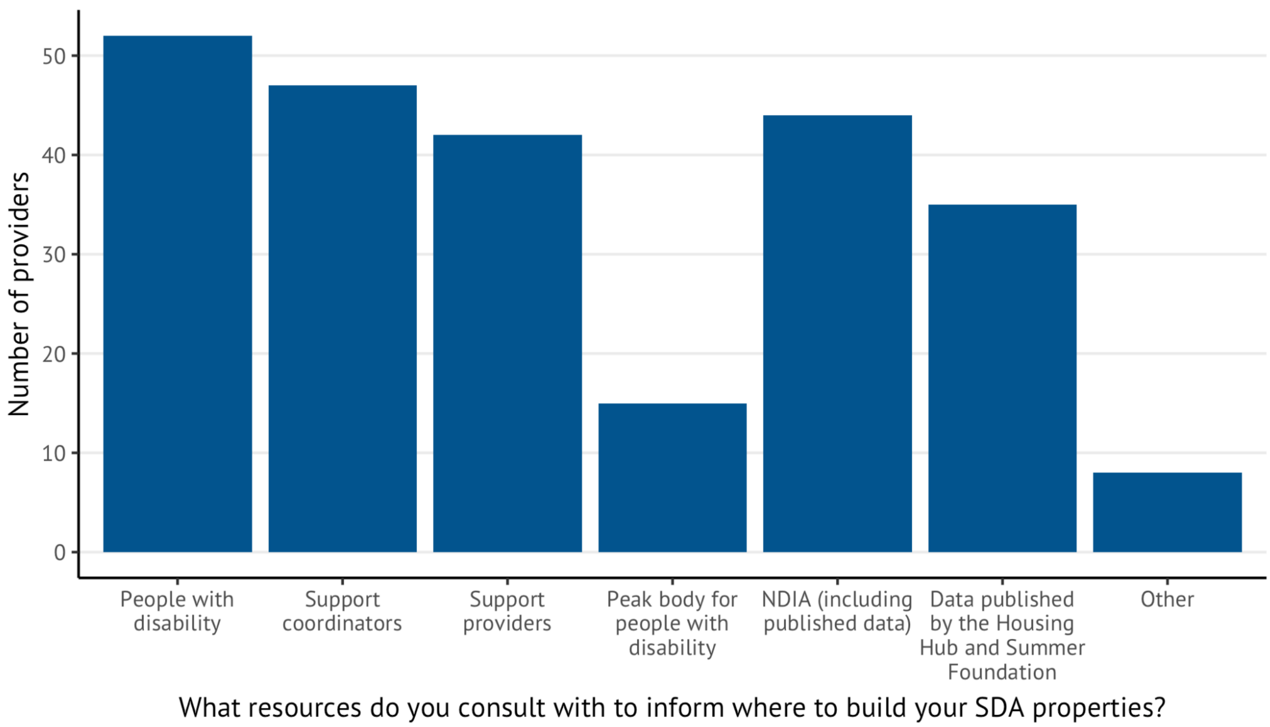
[7] Given the NDIA demand data does not indicate where people want to live or that many participants already have offers for housing that they are waiting to move into, it is important to view the NDIA with caution. This is particularly true if providers are using this data as a resource for build decisions.

Figure 2 - Consultation of groups by SDA providers (n = 62) to inform building type and design category



Note: Providers could select multiple responses

Figure 3 - Consultation of groups by SDA providers (n = 62) to inform the location of the build

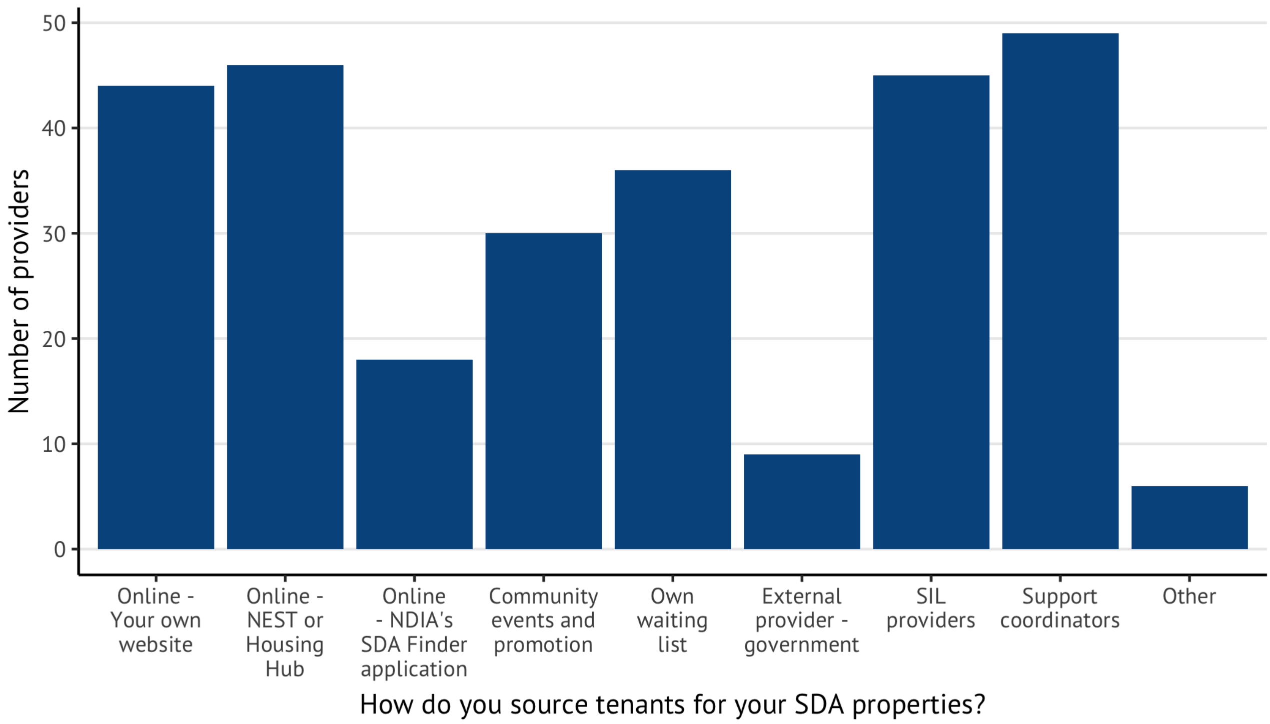


Note: Providers could select multiple responses

Resources used to source tenants

The most common resource for sourcing tenants was support coordinators (79.0%), closely followed by the Housing Hub or Nest (74.2%), and SIL providers (72.6%). Again, more than one resource was typically used with providers reporting, on average, utilising 4.6 resources (*SD* = 2.0, *n* = 62, range = 1-8) to fill their SDA vacancies. Refer Figure 4 for an overview of all strategies reported.

Figure 4 - Resources used by SDA providers (*n* = 62) to source tenants



Note: Providers could select multiple responses

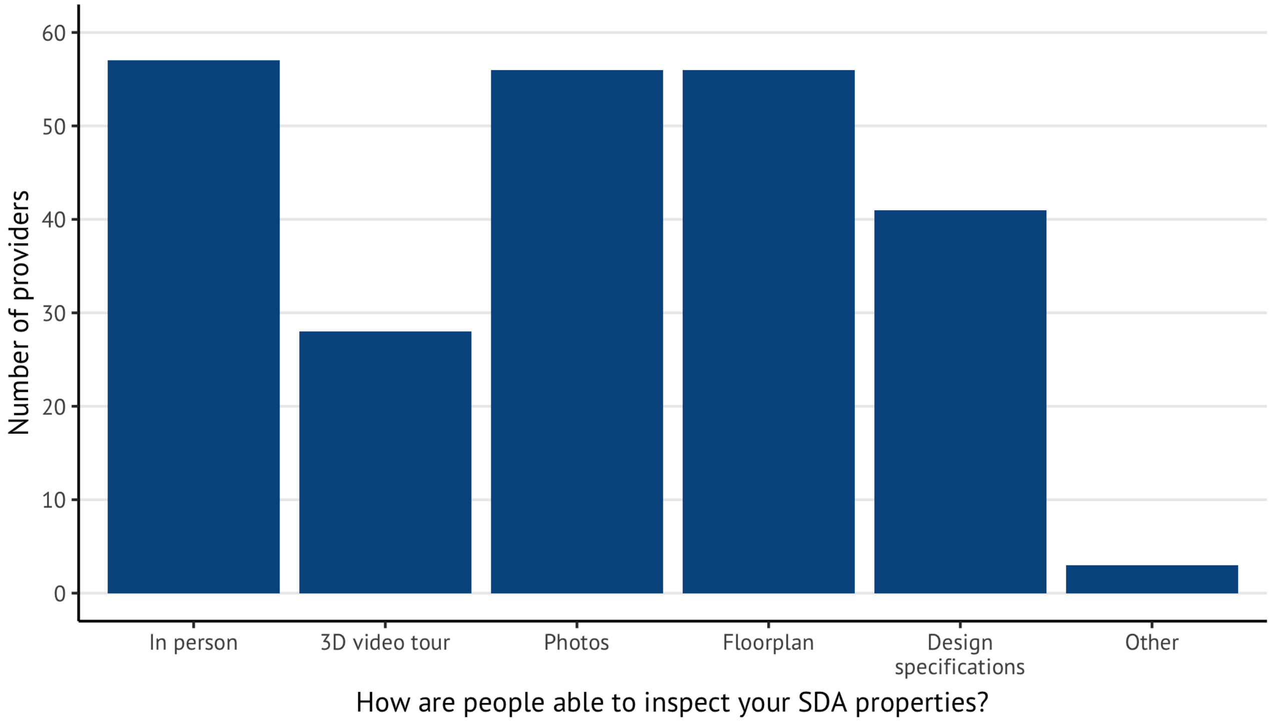
Who do you consult during the design phase?

On average, providers reported consulting with 2.5 different groups of people during the design phase (*SD* = 1.0, *n* = 62, range = 0-4). Like the previous SDA supply report, people with disability were consulted with the most (82.3%), followed by SIL providers (74.2%) and families/carers (69.4%). A minority of providers (4.8%) reported that they consulted nobody. Given that consultation with people with disability is paramount to developing SDA that meets the needs of tenants, these findings are encouraging.

How can properties be inspected?

Introduced in the previous SDA supply report, methods used by providers for inspection of their SDA dwellings were again explored in the most recent survey. On average, providers used 3.9 different strategies (*SD* = 1.0, *n* = 62, range = 1-6), with inspecting the dwelling in person (91.9%) the most commonly reported, followed by photos (90.3%) and floorplans (90.3%). Refer to Figure 5. Given the impact of lockdowns due to COVID-19, and the likelihood that these lockdowns will continue, providers have adapted and relied upon the use of technology in a range of formats to engage potential tenants.

Figure 5 - Methods used by SDA providers (n = 62) for inspection of their dwellings



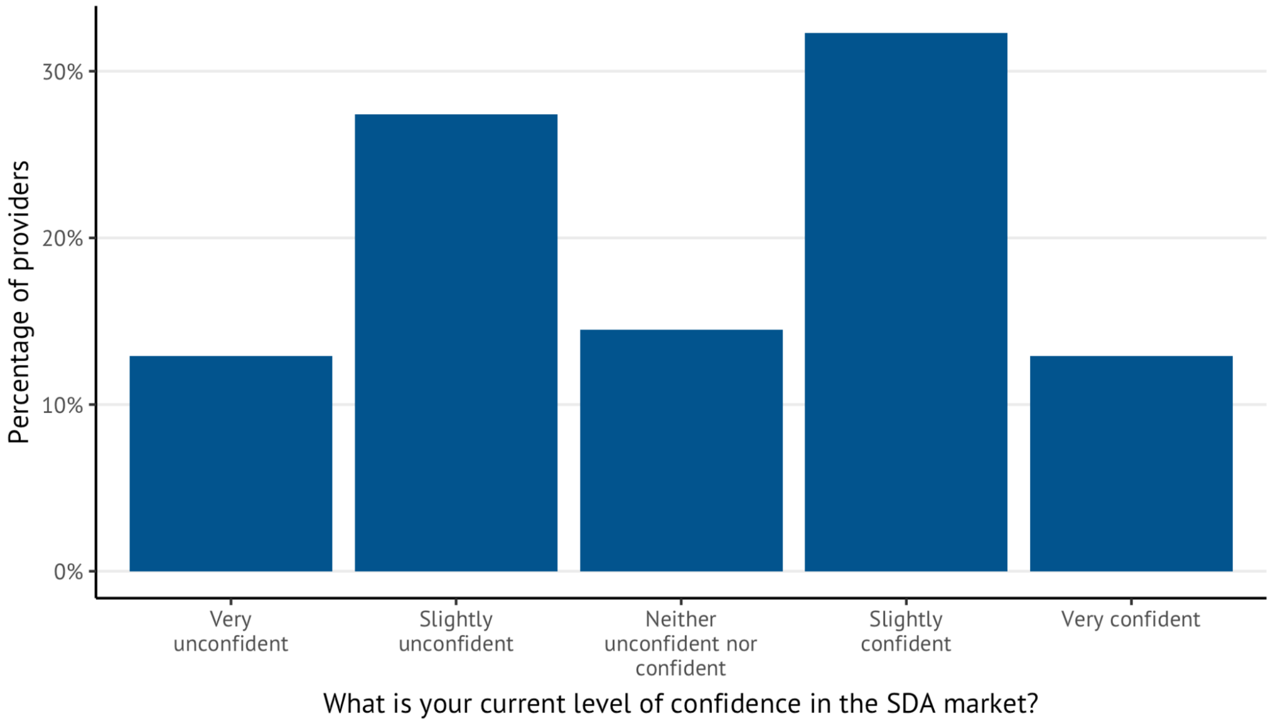
Note: Providers could select multiple responses

Provider confidence in the SDA market

Current level of confidence in the SDA market

Providers were asked to indicate and discuss their current level of confidence in the SDA market. As can be seen in Figure 6, 45.2% of providers reported being slightly or very confident whereas 40.3% of providers reported being slightly or very unconfident.

Figure 6 - Provider confidence in the SDA market (*n* = 62)



Explanations for providers' confidence levels were analysed thematically.

Four key themes emerged across providers who reported feeling very or slightly unconfident, with the first theme being **issues with SDA funding approvals for potential tenants** (*n* = 11). This included long wait times until receiving SDA funding decisions as well as uncertainties around SDA decision making compared to eligibility. Providers noted that determinations often do not match participants' eligibility and need, with a particular lack of approvals for single resident dwellings.

"SDA funding outcomes not being consistent nor inline with participant goals."

"Participants are not being approved for SDA or supports to live independently."

- SDA providers

Secondly, providers expressed feeling very or slightly unconfident in the SDA market due to **problems with activation of demand and supply** (*n* = 9). Providers noted an oversupply of SDA dwellings in certain regions. Moreover, SDA supply was reported to be inconsistent with the housing needs of participants, with one provider stating that “SDA market supply is for HPS however the customers appear to be FA.” As a result, providers expressed concerns about vacancy risks.

“I believe there is a strong desire to build SDA in the region but there [is] limited demand from participants.” - SDA provider

The third theme was **financial concerns** (*n* = 9), including funding issues as well as issues with claiming payments. Funding for SDA was reported to be insufficient to cover the increasing land and building costs. Moreover, providers reported delays in receiving SDA payments, partly due to issues with service bookings.

“Ongoing issues with payments, for example: Service Bookings not set up for months despite many many follow ups.”

“Furthermore, the land price and capital costs of 1 and 2 bedroom SDAs makes the SDA largely financially unviable.”

- SDA providers

The upcoming SDA Price Review in 2023 will be a key point in time for the NDIA to work with the sector to ensure that SDA pricing keeps pace with the cost of land. This will allow all types of SDA dwellings to be developed to meet the needs of NDIS participants.

Lastly, **frequent changes and a lack of clear direction by the NDIA** (*n* = 6) were stated as a reason for feeling slightly or very unconfident in the SDA market. The NDIA was reported to constantly change policies, with providers saying that they are uncertain about the NDIA’s direction regarding single resident dwellings and shared supports.

“NDIS is unstable and constantly changing rules. The NDIS does not provide confidence to any section of the disability services.” - SDA provider

Three key themes emerged across the explanations of providers who reported feeling slightly or very confident. Overall, these providers acknowledged the difficulties and complexities of the current SDA market but retained a positive outlook.

Firstly, providers reported they felt very or slightly confident in the SDA market due to a **high need and demand for SDA** (*n* = 13). It was reported that SDA tenants could be sourced relatively easily, although some providers still expressed concerns about vacancy risks. SDA providers also believed in the longevity of the SDA market, stating that people with disability will continue to need appropriate housing options. The opportunity to meet this need and to contribute to positive participant outcomes appeared to be key motivators for providers to remain confident about the SDA market.

“What keeps us going is knowing there are PWD [people with disability] who need adequate housing and common sense will have to prevail at the NDIA.”

“The SDA market is here to stay, but [there are] lots of challenges to deal with.”

- SDA providers

Providers also noted that **positive changes within the SDA market** (*n* = 6) contributed to their high confidence level. It was reported that the SDA market, including SDA application processes, are becoming more mature and stable, providing a reliable income stream. The quality of dwellings was also reported to be increasing.

"The market is starting to mature."

"There has been an increase in the recognition for high quality dwellings rather than just volume of dwellings."

- SDA providers

Lastly, **NDIA processes were a remaining concern** among providers who were slightly confident but not very confident in the SDA market (*n* = 10). This referred to frequent policy changes, including changes in price guides and participant eligibility, as well as a lack of transparency of NDIA processes and decisions. SDA funding decisions for potential tenants were also reported to be a concern, with providers noting long wait times for receiving decisions and that outcomes are often inconsistent with participants' eligibility and need. Thus, even providers who felt fairly confident about the SDA market expressed concerns.

"Less than very confident due to secret policy changes by the NDIA on participant eligibility."

"It should be a rigorous assessment process for someone to be deemed eligible for SDA funding, to ensure people are receiving the right supports for them. It should not however be a process which is impossibly difficult leaving participants feeling as though they are at battle with the Agency."

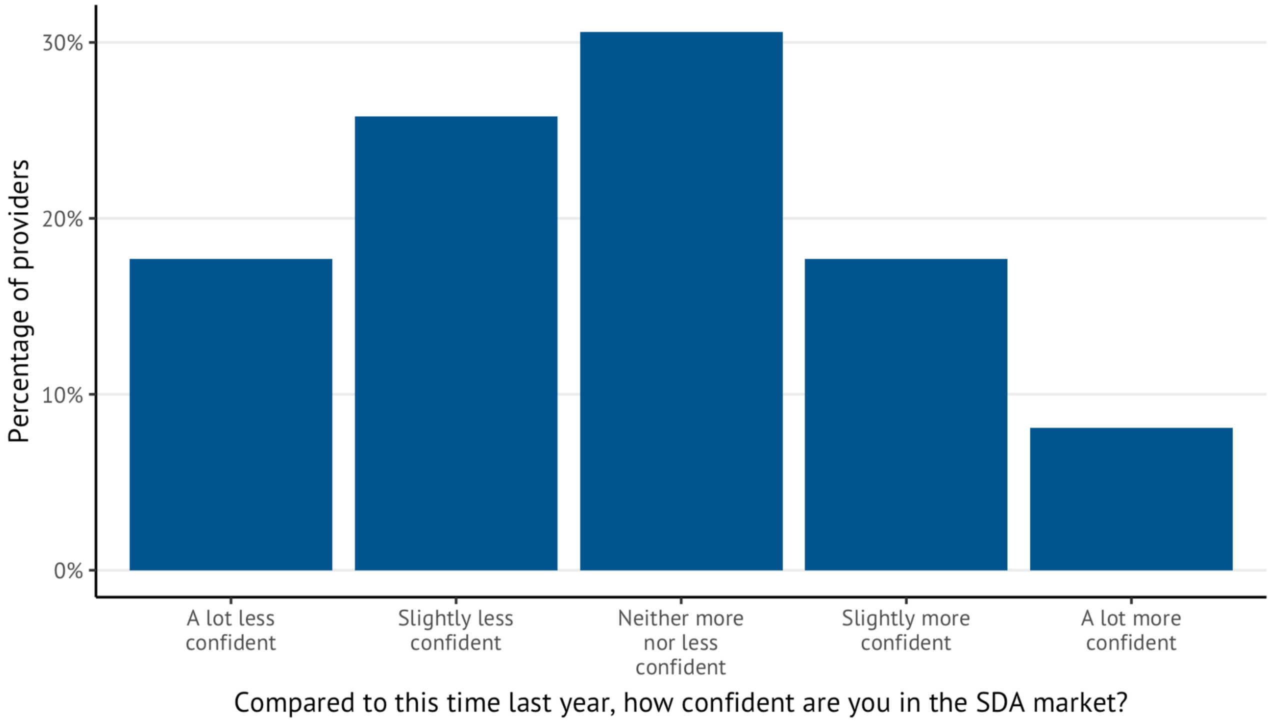
"Eligibility approvals through the SDA Panel have slowed considerably to a point where confidence could be lost."

- SDA providers

Change in level of confidence and explanation for any change

Compared to 12 months ago, provider confidence in the SDA market has decreased. Specifically, 43.5% of providers reported being "a lot" or "slightly" less confident this survey compared to the last report. Refer to Figure 7.

Figure 7 - Change in provider confidence over the past twelve months in the SDA market (*n* = 62)



Three key themes emerged across providers who reported feeling a lot less or slightly less confident compared to when they completed the SDA supply survey last year. Firstly, providers reported that **issues with SDA funding determination for potential tenants** (*n* = 9) contributed to a decline in their confidence levels. This included long timeframes for receiving SDA determinations as well as changes to eligibility, with approvals for single resident dwellings becoming more difficult to achieve. As a result, providers reported concerns about vacancy risks and an increased need for appeals.

"Single occupancy SDA approvals are not being approved despite fair justification and appropriateness. Shared SDA approvals are not what participants are needing or wanting in many cases. Time and resources are being wasted in assisting with appeals and SDA is developing a reputation of being mythical."

"Eligibility changes and time to achieve SDA outcomes have deteriorated."

- SDA providers

Secondly, providers noted that **market instabilities** (*n* = 9) contributed to a decline in their confidence levels. This theme included concerns about constant policy changes by the NDIA, with a particular focus on changes to funding. Providers perceived that the NDIA was unreasonably cutting costs and funding, leading to financial insecurities for providers.

"NDIA has shown a ruthlessness in savings and a disregard for providers."

"There appears to be a concerted effort by the NDIA to rationalise costs across the entire Scheme and this is having a negative impact on the SDA market. The cost-rationalisation demonstrated by the Agency appears to be at the expense of participant choice and control."

- SDA providers

Lastly, some providers reported feeling a lot less or slightly less confident in the SDA market due to a sense of **competition** (*n* = 5). It was reported that while the number of NDIS participants with SDA in their plan has slowed, an increasing number of new SDA providers and supply appeared to enter the market. Increased difficulties of acquiring development sites were also indicated to be an issue.

"The demand has dropped off but there are many SDA providers trying to move into the market." - SDA provider

Three key themes emerged across the responses from providers who reported feeling slightly more or a lot more confident in the SDA market compared to when they completed the SDA supply survey last year. Firstly, providers noted **positive changes and potential for growth** (*n* = 7) within the SDA market. For example, providers reported increased SDA demand, partly due to approvals through section 100 reviews,[8] as well as increased information and data availability. SDA providers also recognised that the SDA market will continue to develop and improve, with SDA having the potential to reduce SIL costs over time.

"SDA is a hot topic of conversation, the more people talking about the better the education piece will get."

"The newly available data to facilitate location assessments is a welcomed resource."

- SDA providers

Further, providers expressed **improved engagement and interaction with stakeholders** (*n* = 5) as a reason for their increased confidence levels. This included engaging in discussions, networking, and collaborating with other SDA providers, SIL providers, as well as key organisations such as the NDIA and Summer Foundation.

"I have spoken to a number of providers and the NDIA and Summer Foundation, I have concluded to stick to my original plan."

"We are working super hard to find and network with providers."

- SDA providers

Lastly, providers reported feeling slightly or a lot more confident in the SDA market due to **gaining more experience** within the sector (*n* = 4). Providers stated that they better understand SDA processes and are improving their business approaches accordingly.

"Being in the space longer, I understand the processes better."

"Slowly making progress, building our systems, adapting our approach."

- SDA providers

[8] An internal review of a NDIA planning decision, as stipulated in the National Disability Insurance Scheme Act 2013.

Property and tenancy management

SDA property management

The vast majority of providers reported that they manage their SDA properties (83.9%), with only 10 providers indicating that other organisations manage their SDA properties for them. Of these 10 providers, 40% were satisfied or very satisfied with their property managers.

SDA tenancy management

Similar to SDA property management, 87.1% of providers reported that they also manage their SDA tenancies. Of the 8 providers who used other organisations to manage their tenancies, 62.5% were satisfied or very satisfied with how their tenancies were managed.

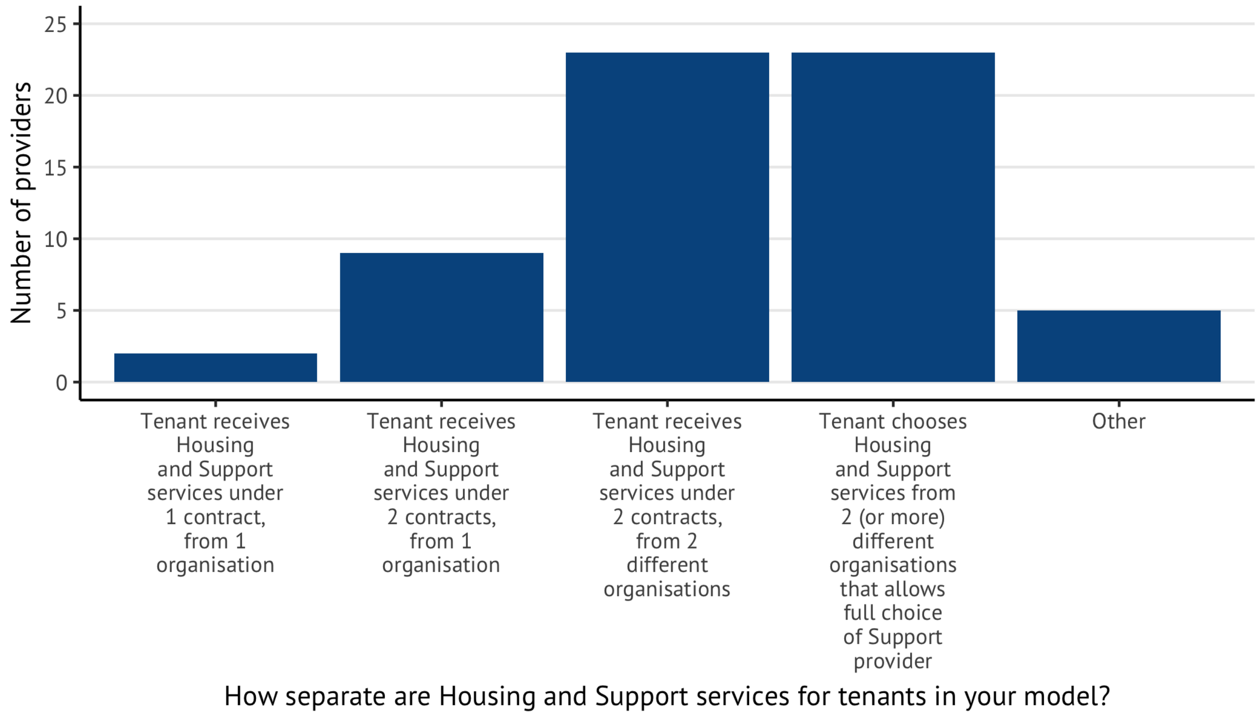
Separation of housing and support services

The NDIA requires that housing and supports be provided by separate organisations within SDA settings. In addition, the market will, over time, develop different approaches to the provision of supports in SDA. This survey asked how this is being implemented by SDA providers, across the continuum from no separation through to full choice over supports.

As can be seen in Figure 8, 37.1% of providers reported that their tenants chose housing and support services from 2 (or more) different organisations that allows full choice of their support provider. This means that 54.8% of providers have indicated that their tenants' choice of supports is in some way limited.

Interestingly, the percentage of providers that allow their tenants full choice of their supports has decreased from 54.4% in the previous survey to 37.1% in the most recent survey.

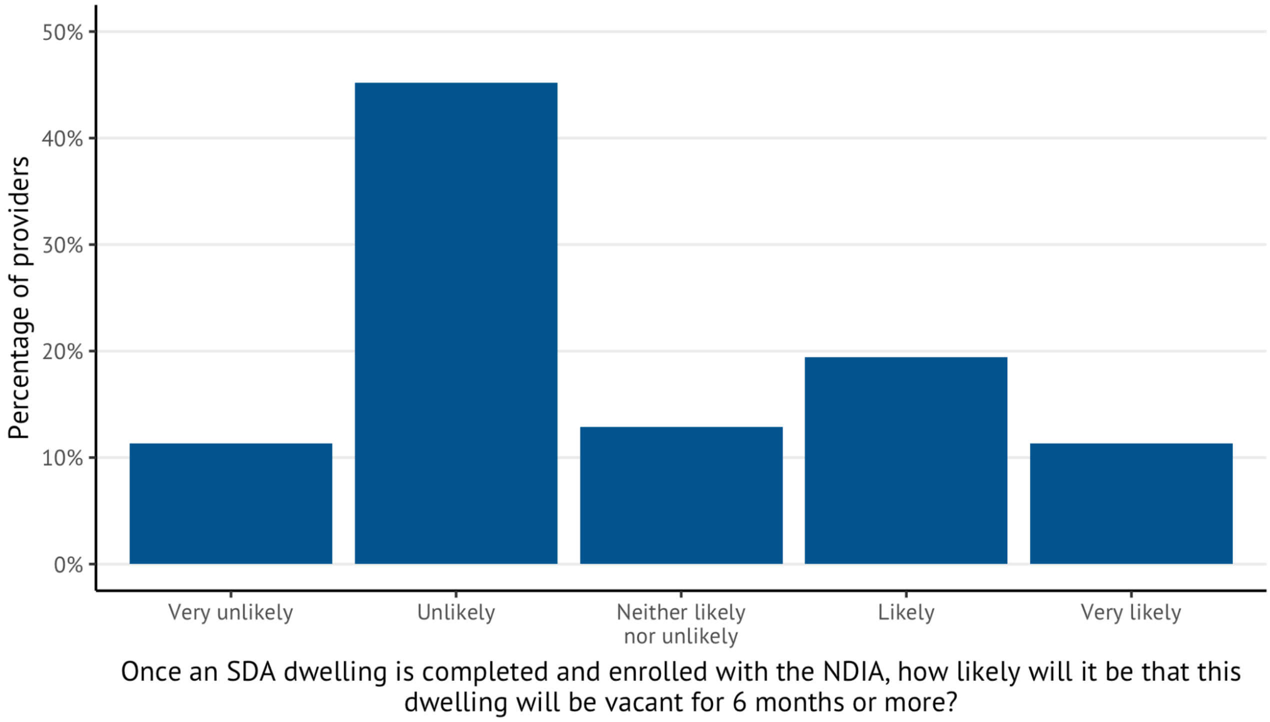
Figure 8 - Models for separation of housing and support services (*n* = 62)



Likelihood of vacancies

More than half of providers (56.5%) indicated that it would be 'very unlikely' or 'unlikely' that a dwelling would be vacant for 6 months or more once the dwelling is completed and enrolled with the NDIA. Refer to Figure 9. This shows that more than 30% of SDA providers believe they will experience lengthy vacancies and may indicate that activation of demand for SDA is not keeping up with supply. To combat this, immediate action by the NDIA to identify people eligible for SDA and provide SDA funding in NDIS plans is needed.

Figure 9 - The likelihood of vacant dwellings for six months or more (*n* = 62)



Needs and preferences of people with disability

Level of understanding needs/preferences of people with disability

Providers were asked to indicate, on a scale of 1-5 (where 1 = strongly disagree and 5 = strongly agree) how much they agreed with the statement "I understand the needs and preferences of people with disability when building our SDA properties". Similar to the findings of the previous report, providers had a tendency to to agree with this statement (*M* = 4.0, *SD* = 1.3, *n* = 62).

Resources used to understand needs and preferences

Similar to the previous report, providers were again asked what resources they used to gain a better understanding of the needs and preferences of people with disability to ensure the suitability of any planned SDA development. The findings revealed that on average, providers used 2 resources (*SD* = 1.6, *n* = 62, range = 0-4), with the NDIA quarterly reports and data used the most (69.4%), followed by Housing Hub market data reports (51.6%) and "other" (45.2%) which included responses such as discussions with people with disability, families and other providers (refer to Appendix C for a list of these responses).

Questions for people with disability

Providers were also asked if they had any questions that they would like to ask people with disability to help them better understand their needs and preferences. While the majority of providers (69.4%) said ‘no’, frequently reported questions centred on strategies to best meet the specific needs and preferences of potential tenants. Example questions included:

- “How many people will they be comfortable sharing supports with?”
- “Do they want to be close to particular amenities or are they looking for a quiet place further away from amenities?”
- “What is important in how you would like to live?”
- “How to best support individuals to find suitable house mates when approved to share but wanting to live alone?”
- “How can I meet you earlier to meet your specific needs in SDA?”

Refer to Appendix D for a list of all questions.

SDA policy

Difficulty that dwellings will meet design standard

The SDA Design Standard came into effect on 1st July 2021, which sets out detailed design requirements that will be incorporated into newly built SDA, seeking enrolment under the NDIS. The NDIA may refuse to enrol dwellings if certification of compliance with the SDA Design Standard is not provided.

Providers were asked to indicate, on a scale of 1-5 (where 1 = very difficult and 5 = very easy), how difficult has it been/will it be to ensure their dwellings meet these requirements. On average, providers reported it has been/will be neither difficult nor easy ($M = 3.0$, $SD = 1.0$, $n = 62$). This is consistent with the findings of the previous report and may indicate that providers are still working through the implications of the SDA Design Standard.

Will the Design Standard improve the confidence of SDA providers?

Providers were also asked if they agree with the statement by the NDIA that the SDA Design Standard would improve the confidence of SDA providers in the SDA market through the availability of design certifications and independent SDA assessors. Less than half of the providers (43.5%) agreed with this statement, with 37.1% of providers reporting that they were unsure.

Has the centralised Housing Operations team made a positive impact on tenants by reducing the time taken for decision-making?

According to the NDIA, a new, centralised Housing Operations team has been established in line with the Home and Living Strategy. This team has the ability to make end-to-end decisions about housing and other related supports for participants to reduce timeframes and increase decision making consistency. Providers were asked, based on their experience, if they agree that this team has had a positive impact on their tenants by reducing the time taken to make decisions about their SDA and support. More than half of the providers (53.2%) strongly disagreed or disagreed with this statement, and did not believe that the Housing Operations team made a positive impact on decision-making timeframes.

Enabling tenants to live with family, friends, or flatmates

Policy changes have previously been released enabling tenants to live with family, friends or flatmates of their choice who are not receiving SDA funding. Providers were asked if the dwellings in their pipeline would accommodate this policy change. More than half of providers (64.5%) indicated ‘yes’, while 22.6% of providers were unsure.

These findings show that the willingness of providers to implement this policy change is essential for this to be a reality in the SDA market. However, given that 22.6% and 12.9% of providers were ‘unsure’ or reported ‘no’ respectively, more work needs to be done to give NDIS participants choice over who they live with.

Results: SDA Pipeline

The pipeline data presented in this section is based on the responses of 59 SDA providers for which there was estimated to be 1,661 dwellings in development or an estimated total of 2,366 SDA places. This is equivalent to an average of 1.4 SDA residents per dwelling – refer to Appendix A for a detailed account of the data screening which took place for this section. Note that as per the previous survey, completed dwellings which had already been enrolled with the NDIA were excluded from the analysis and thus, not included in the current report. This is to avoid duplication with what is already published by the NDIA. All dwellings reported for each of the following stages of development were included:

- Construction completed, pending enrolment with the NDIA
- Under construction
- Development stalled
- Development and building approval completed and contractually committed to build
- Land secured, waiting for building approval and/or finance approval

SDA supply pipeline: National overview

Maximum number of residents

As can be seen in Table 2, almost three-quarters (72.7%) of the estimated number of dwellings in the pipeline around Australia will accommodate a maximum of 1 SDA resident. Similar to the previous survey, this again confirms that the market is moving away from larger settings that accommodate 4-5 residents such as group homes.

Table 2 - Number and percentage (%) of SDA dwellings (*n* = 1,661) and places (*n* = 2,366) in Australia by maximum number of residents

Maximum number of residents	Dwellings	% of dwellings	Places	% of places
1	1207	72.7	1207	51.0
2	243	14.6	486	20.5
3	167	10.1	501	21.2
4	38	2.3	152	6.4
5	4	0.2	20	0.8
Unknown	2	0.1	N/A	0

Note: There are 2 dwellings for which the maximum number of residents is unknown and therefore, the number of SDA places are also unknown.

Location

All 8 states and territories were reported as locations where SDA dwellings are currently being built. As can be seen in Table 3, the majority of SDA places in the national pipeline are being built in Queensland (28.8%), New South Wales (24.7%) and Victoria (23.6%). Even though only 0.5% of places are being developed in the Northern Territory, this is still an improvement from the previous survey wherein no SDA dwellings/places were reported.

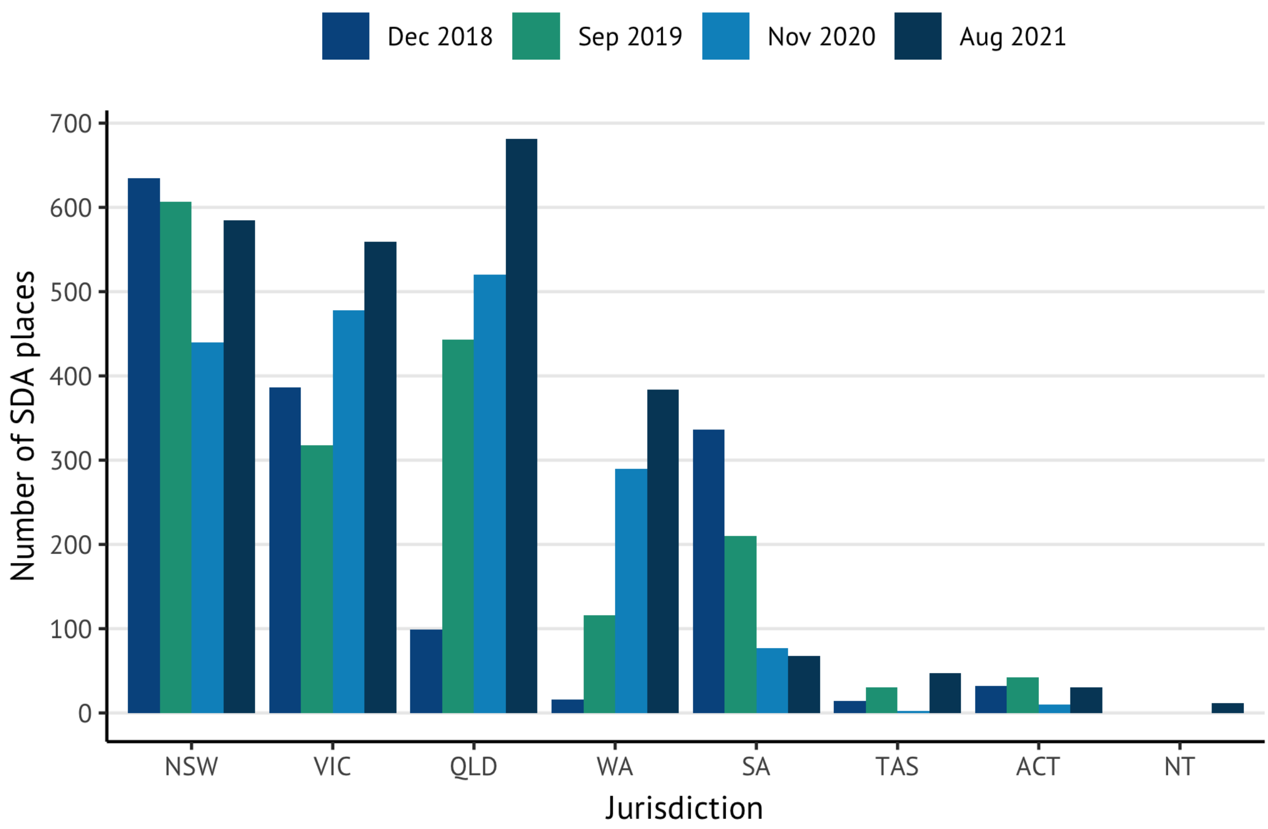
Table 3 - Number and percentage (%) of SDA dwellings (*n* = 1,661) and places (*n* = 2,366) by state and territory

State	Dwellings	% of dwellings	Places	% of places
NSW	408	24.6	585	24.7
VIC	416	25.0	559	23.6
QLD	462	27.8	681	28.8
WA	248	14.9	384	16.2
SA	64	3.9	68	2.9
TAS	27	1.6	47	2.0
ACT	30	1.8	30	1.3
NT	6	0.4	12	0.5

Note: For 2 dwellings in the NT, the number of SDA places is unknown

As reported in the previous report, there continues to be a more even spread of development activity across Queensland, New South Wales and Victoria rather than a high concentration of dwellings and places in 1 state (i.e., New South Wales) which was seen in the 2018 and 2019 pipeline (refer to Figure 10). Even though SDA supply is continuing to establish across Australia, the findings of the current report shows that growth is still needed in every state and territory, particularly in South Australia, Tasmania, the Australian Capital Territory, and the Northern Territory.

Figure 10 - A comparison of SDA places in development over time



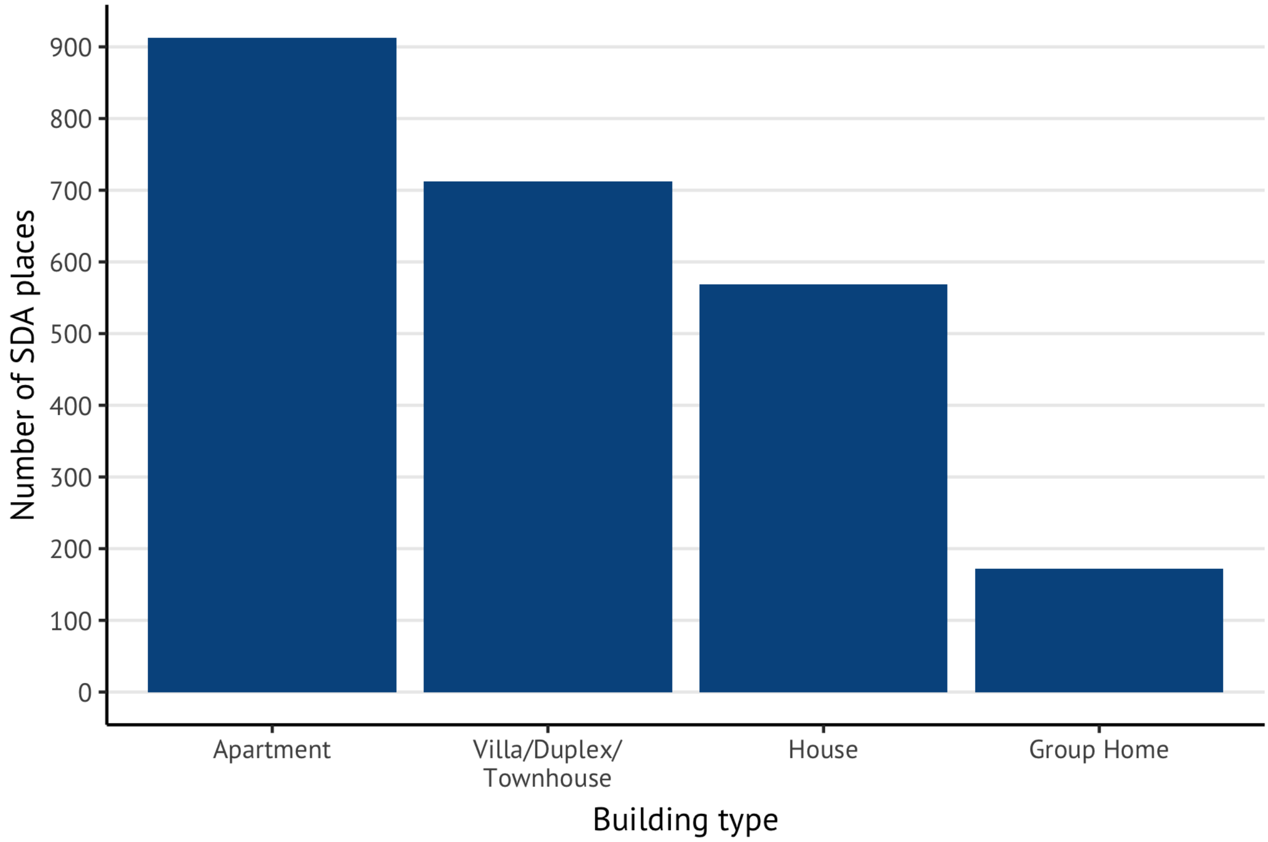
Note: December 2018 (n = 1,518 places), September 2019 (n = 1,766 places), November 2020 (n = 1,817 places), August 2021 (n = 2,366 places)

Building type

According to the SDA Price Guide (NDIS, 2021), there are 4 building types that the NDIS provides SDA funding for. These are apartments, villas/duplexes/townhouses, houses, and group homes (refer p.g., 11 for a brief description).

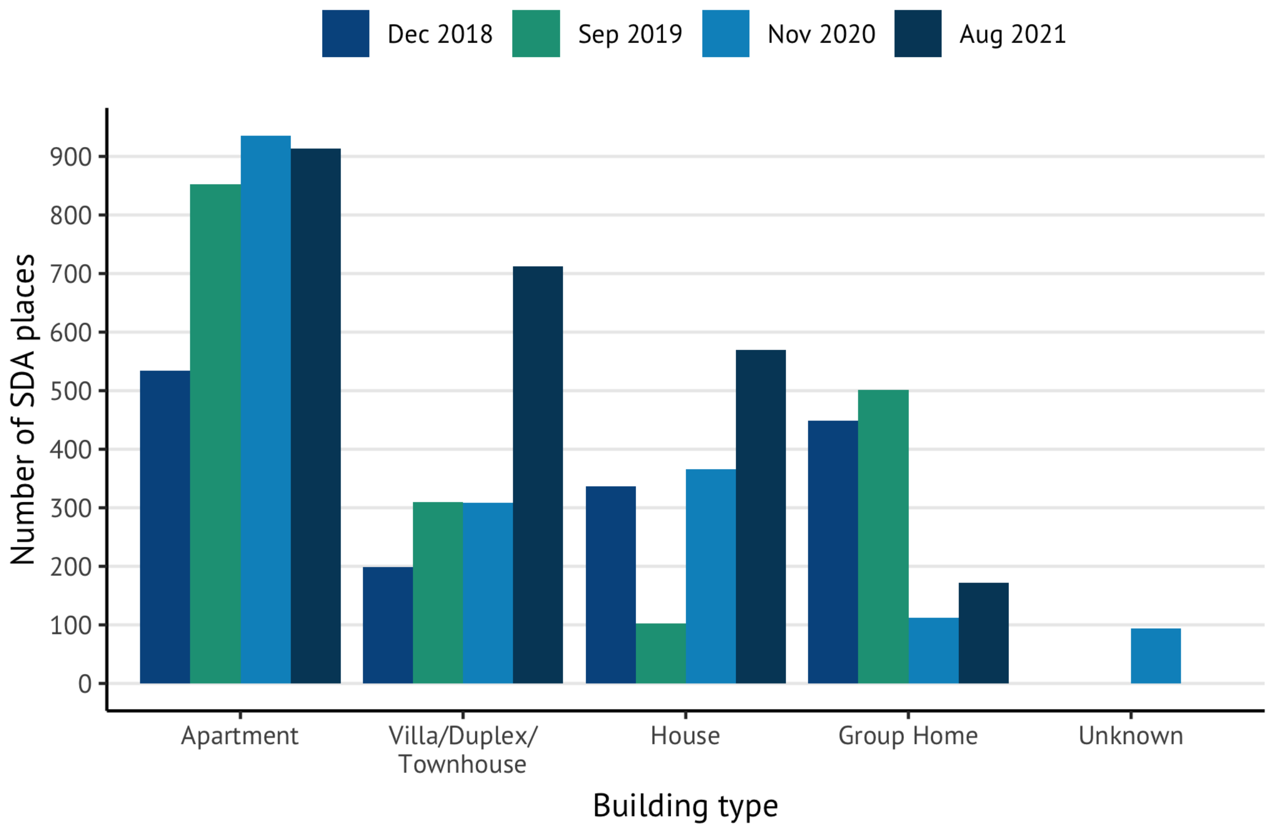
As can be seen in Figure 11, the highest number of SDA places across Australia are accounted for by apartments (913; 38.6%), followed by villas/duplexes/townhouses (712; 30.1%), houses (569; 24.0%) and group homes (172; 7.3%).

Figure 11 - Estimated number of SDA places (*n* = 2,366) by building type across Australia



Highlighted by Figure 12, there is a very slight decline in the number of SDA places accounted for by apartments in the pipeline this year (913 places) in comparison to the pipeline last year (936 places). However, the number of SDA places accounted for by all other building types has increased, particularly for villas/duplexes/townhouses for which the number of SDA places have more than doubled. The smallest increase was for group homes, accounting for an extra 60 SDA places in the pipeline in comparison to last year.

Figure 12 - A comparison of SDA places in development by building type over time



Apartments are the dominant building type reported for new SDA across all states and territories except the Northern Territory. However, as can be seen in Figure 13, this is only a marginal trend in New South Wales and Queensland wherein villas/duplexes/townhouses and houses account for a similar number of SDA places, respectively. Similar to the previous survey, the greatest number of apartments are again being built in Queensland; however, there is more development across the other building types this year and as such, the number of SDA places accounted for by apartments has decreased from 386 (reported in 2020) to 290 (current survey). Also consistent with the previous survey is that there are more group homes in development in Western Australia than any other state and territory.

Figure 13 - Estimated number of SDA places (*n* = 2,366) across building type for each jurisdiction

Jurisdiction	Apartment	Group Home	House	Villa/Duplex/Townhouse
NSW	208	54	120	203
VIC	224	30	118	187
QLD	290	12	236	143
WA	109	76	76	123
SA	45	0	7	16
TAS	7	0	0	40
ACT	30	0	0	0
NT	0	0	12	0

A more detailed snapshot of the estimated number of SDA places reported by building type is provided in Table 4.

Table 4 - Estimated number and percentage (%) of SDA places (*n* = 2,366) by building type (granular breakdown)

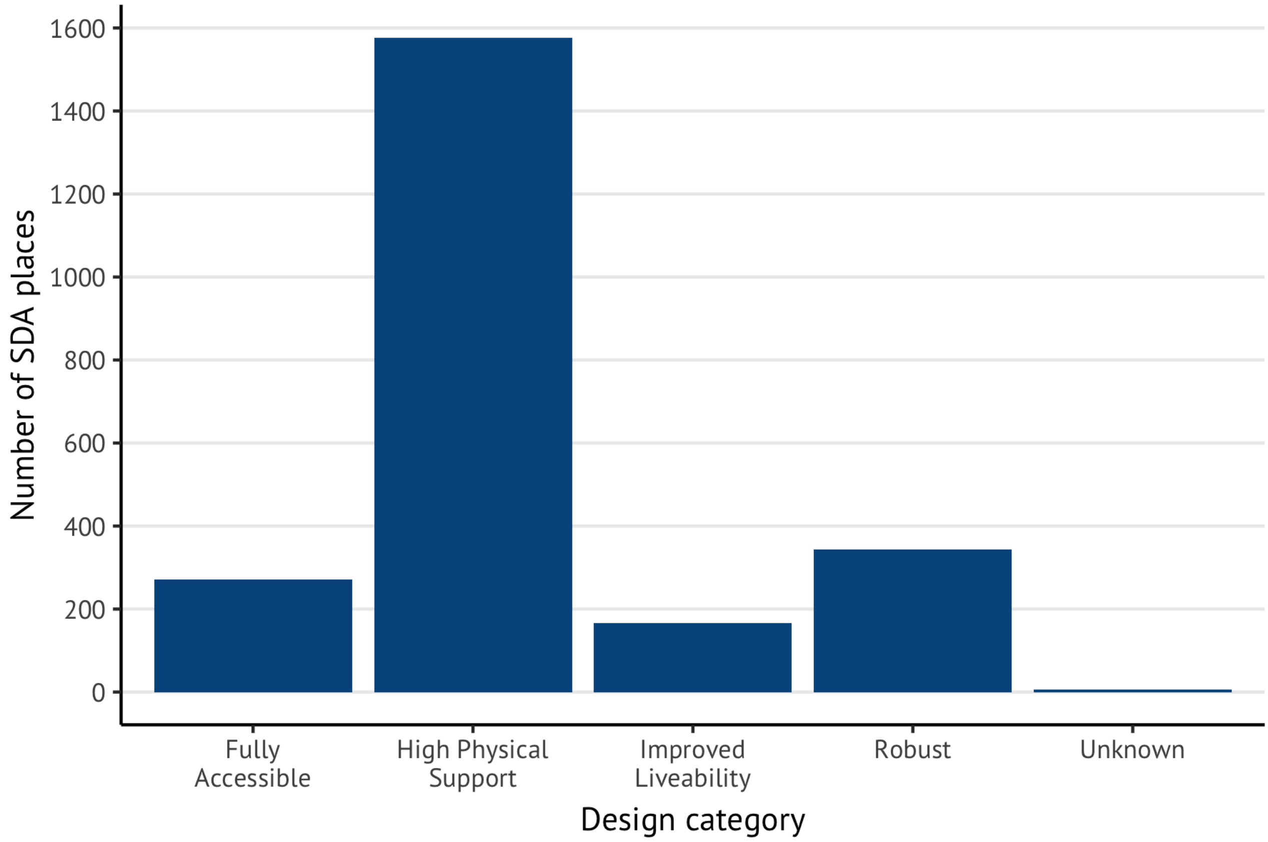
Building type	Places	% of places
Apartment, 1 bedroom, 1 resident	393	16.6
Apartment, 2 bedrooms, 1 resident	371	15.7
Apartment, 2 bedrooms, 2 residents	131	5.5
Apartment, 3 bedrooms, 2 residents	18	0.8
Group home, 4 residents	152	6.4
Group home, 5 residents	20	0.8
House, 2 residents	201	8.5
House, 3 residents	368	15.6
Villa/Duplex/Townhouse, 1 resident	419	17.7
Villa/Duplex/Townhouse, 2 residents	161	6.8
Villa/Duplex/Townhouse, 3 residents	132	5.6
Total	**2,366**	**100**

As shown in Table 4, half of the reported SDA places are accounted for by 1 resident dwellings, with villas/duplexes/townhouses providing the most (17.7%), followed by 1 bedroom apartments (16.6%), and 2 bedroom apartments (15.7%).

Design category

According to the SDA price guide (NDIS, 2021), there are 4 design categories that the NDIS provides SDA funding for. These are: Fully Accessible, High Physical Support, Improved Liveability and Robust (refer p.g., 11 for a brief description). Figure 14 shows the estimated number of SDA places reported by design category across Australia.

Figure 14 - Estimated number of SDA places (*n* = 2,366) by design category across Australia

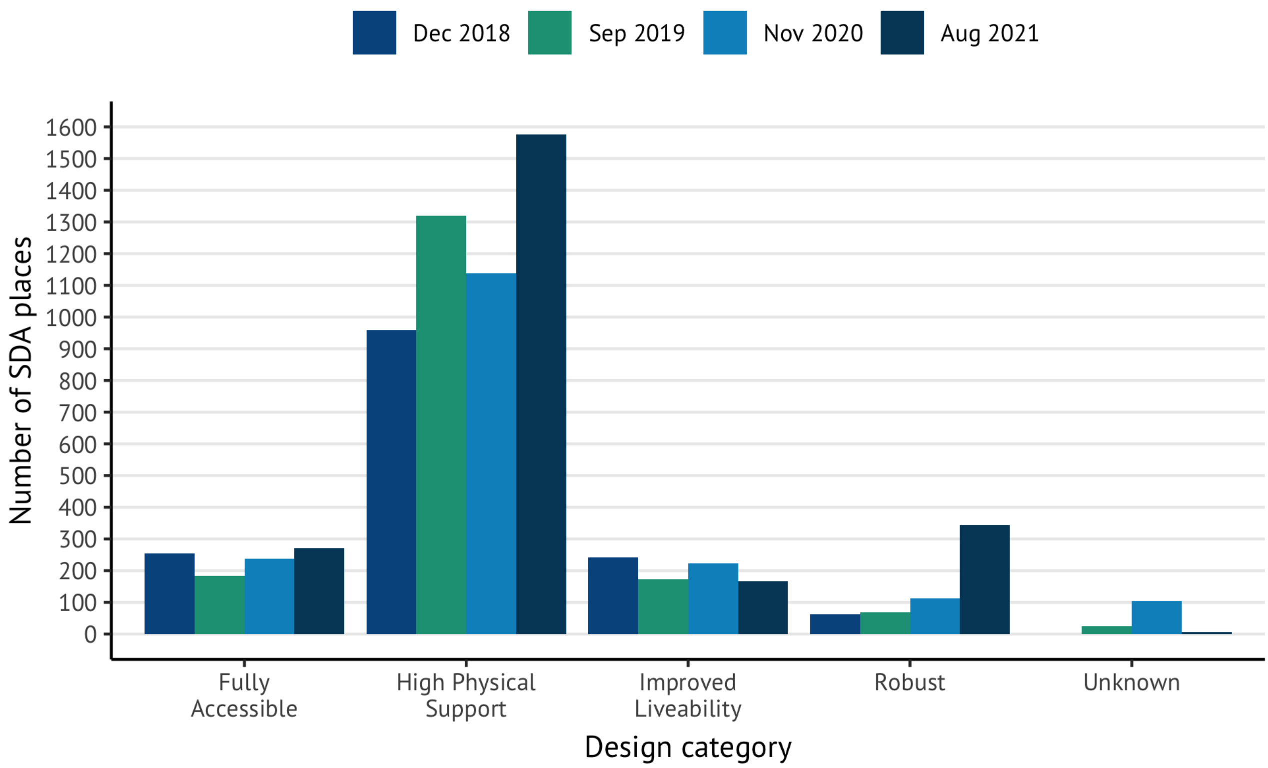


Note: Design category was not reported for 2 dwellings and 6 SDA places

As can be seen in Figure 14, High Physical Support accounts for approximately two thirds of SDA places (1,577; 66.7%), followed by Robust (344; 14.5%), Fully Accessible (272; 11.5%) and Improved Liveability (167; 7.1%). However, it is important to note that these findings should be interpreted with caution as many providers reported that dwellings and places in their pipeline were not being exclusively developed for one particular design category (e.g., they will accept Fully Accessible-funded tenants in a High Physical Support dwelling).

As can be seen in Figure 15, the number of High Physical Support SDA places has increased from the previous survey by almost 40%, and the number of Robust SDA places has more than tripled. The latter finding is welcome, considering that the Robust design category has been the least common design category to be developed in the pipeline since 2018. There was also a slight increase in the number of Fully Accessible SDA places and a slight decrease in the number of Improved Liveability SDA places in comparison to the survey last year.

Figure 15 - A comparison of SDA places in development by design category over time



Across states and territories, a similar trend in design category was found. As shown in Figure 16, High Physical Support is the predominant design category across all jurisdictions except Northern Territory, with the most High Physical Support places being developed in Queensland (486 places).

Figure 16 - Estimated number of SDA places (*n* = 2,366) across design category for each jurisdiction

Jurisdiction	Fully Accessible	High Physical Support	Improved Liveability	Robust	Unknown
NSW	104	296	78	107	0
VIC	102	312	51	94	0
QLD	32	486	32	131	0
WA	24	351	6	3	0
SA	7	57	0	4	0
TAS	0	45	0	2	0
ACT	0	30	0	0	0
NT	3	0	0	3	6

Note: Design category was not reported for 2 dwellings and 6 SDA places

Building type and design category

Across Australia, there is a large estimated proportion of SDA places for High Physical Support apartments in the pipeline this year. This was followed by High Physical Support houses, High Physical Support villas/duplexes/townhouses and Robust villas/duplexes/townhouses (refer to Figure 17). Similar to the 2019 and 2020 pipelines, High Physical Support dwellings continue to dominate the SDA pipeline again this year. However, even though there is still a decline from the 2019 survey, the number of group homes has slightly increased this year in comparison to last year, across all design categories. Thus, there is no clear trend to suggest that the SDA market is moving away from older style models to smaller settings that promote independence. The most sizeable difference between the 2020 and 2021 SDA pipeline is that there are more Robust places in development across all build types, particularly villas/duplexes/townhouses. For this build type, there is an estimated increase of 170 places. This is welcome news for the SDA market and suggests that barriers which may have existed about the perceptions about Robust tenants and their needs may be improving.

Figure 17 - Estimated number of SDA places (*n* = 2,366) across building type and design category in Australia

Building type	Fully Accessible	High Physical Support	Improved Liveability	Robust
Apartment	110	750	46	7
Villa/Duplex/ Townhouse	101	338	56	217
House	49	353	61	100
Group Home	12	136	4	20

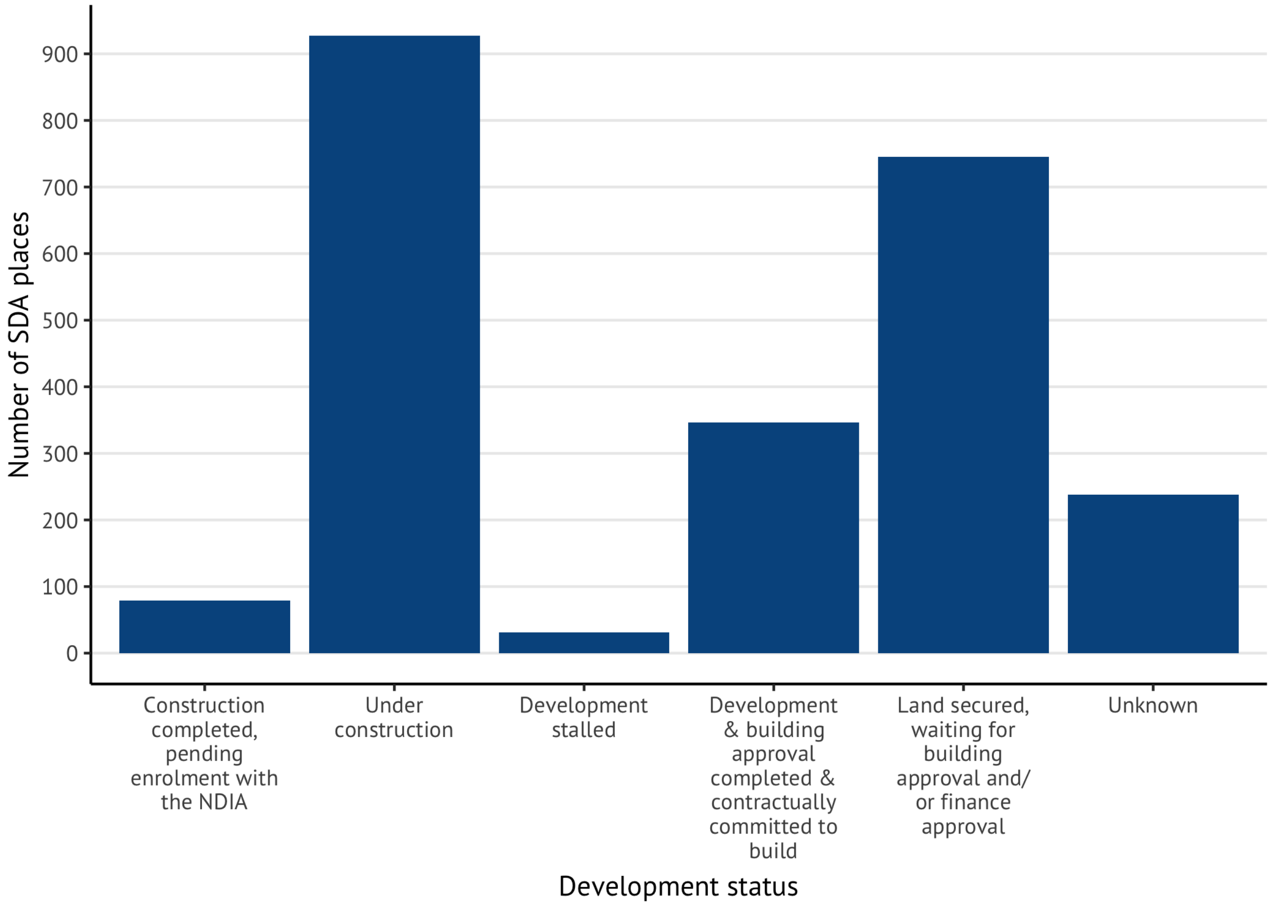
Note: Building type and design category was not reported for 2 dwellings and 6 SDA places

SDA development status

Figure 18 shows the stage of development for SDA projects in the pipeline, with the most activity "under construction" (927 places; 39.2% of all places), followed by "land secured, waiting for building approval and/or finance approval"[9] (745 places; 31.5% of all places) and "development and building approval completed and contractually committed to build" (346 places; 14.6% of all places). Interestingly, 31 (or 1.3%) SDA places are currently stalled which according to many SDA providers, is due to the increasing uncertainty in the SDA market.

[9] Given this development status could be classified as the most risky because many developments may not go ahead, this highlights that the number of SDA dwellings and places in the pipeline need to be interpreted with caution.

Figure 18 - Estimated number of SDA places (*n* = 2,366) by development status in Australia

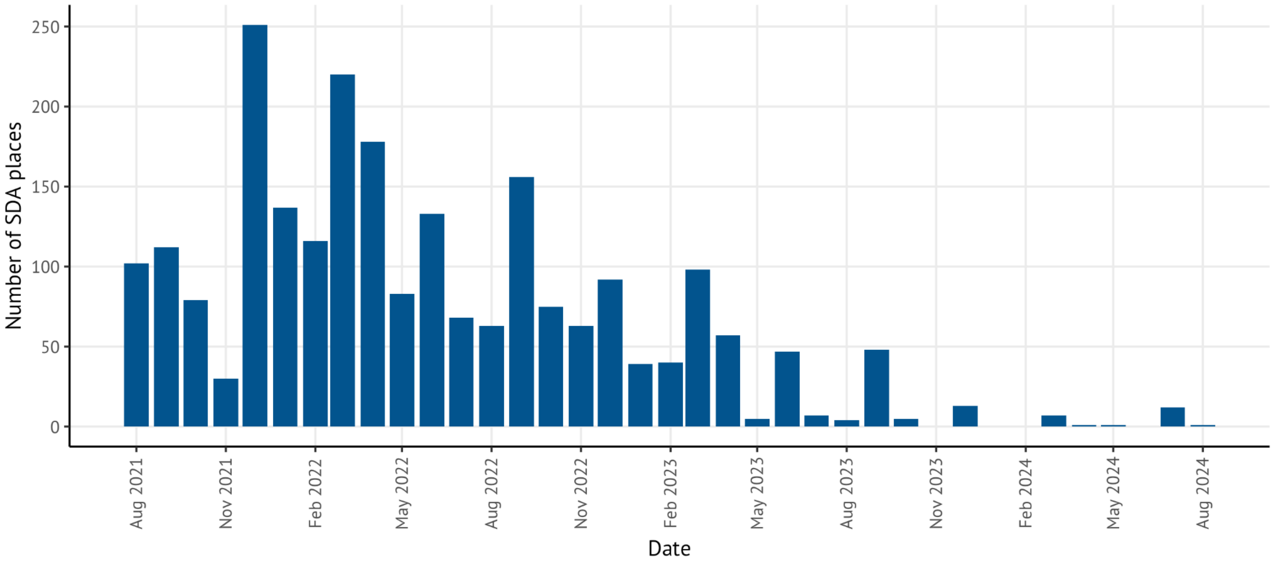


Note: The 238 SDA places that are listed as 'unknown' are not missing data; rather this category is used to describe properties that were included from the 2020 pipeline data for which the current development status is unknown.

Estimated occupancy date

Unlike the pipeline last year which had a relatively even distribution of occupancy dates, the pipeline this year is more skewed towards occupancy in 2022. This means that many dwellings and respective places are estimated to be available for occupancy sooner. Specifically, as can be seen in Figure 19, it is estimated that 73.6% of SDA places will be available for occupancy within the next 12 months. This may be an early indicator of the falling confidence in the NDIA and the SDA market, as relatively few new developments are being embarked upon.

Figure 19 - Estimated number of SDA places (*n* = 2,366) by estimated date of occupancy in Australia



Note: Date of occupancy was unknown for 16 SDA places. Estimated dates for occupancy should be viewed with caution as the occupancy dates for SDA places reported and carried forward from the previous survey may have changed.

SDA provider and developer profiles

Figure 20 highlights the estimated number of SDA places by provider type across Australia and Table 5 presents a comparison of this activity across the 2018, 2019, 2020 and current survey.

Figure 20 - Estimated number of SDA places (*n* = 2,366) by provider type in Australia

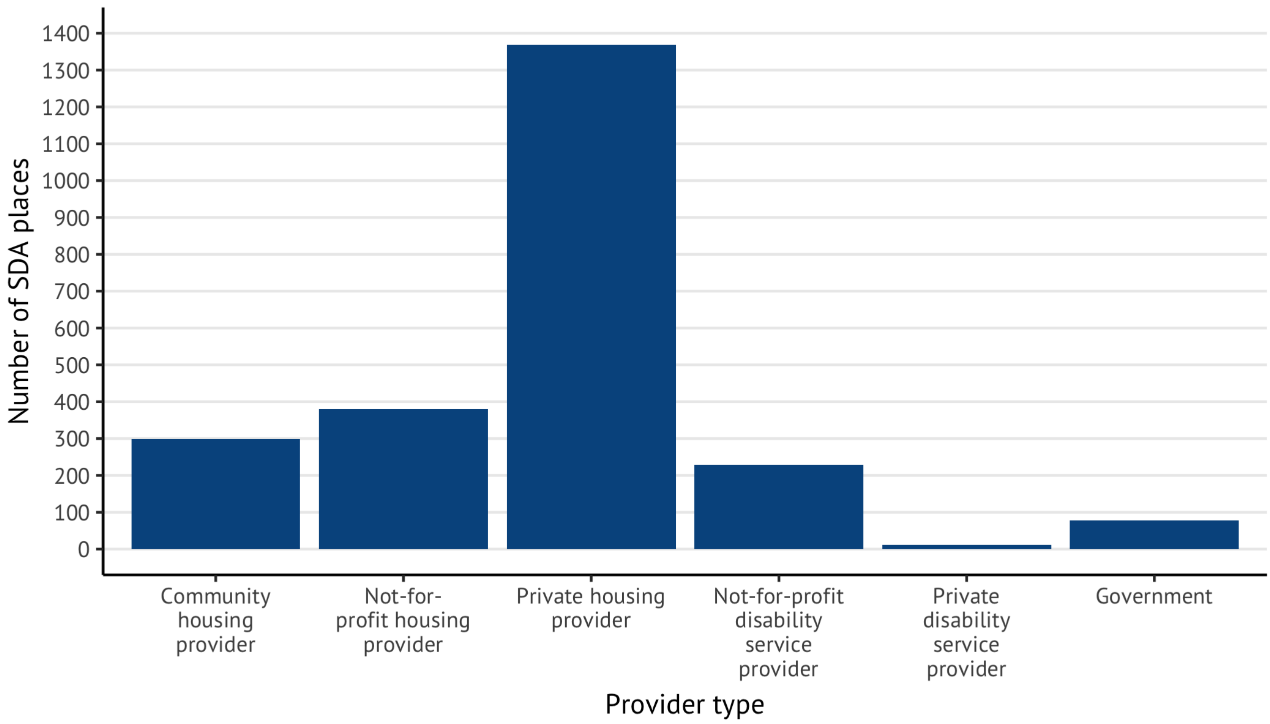


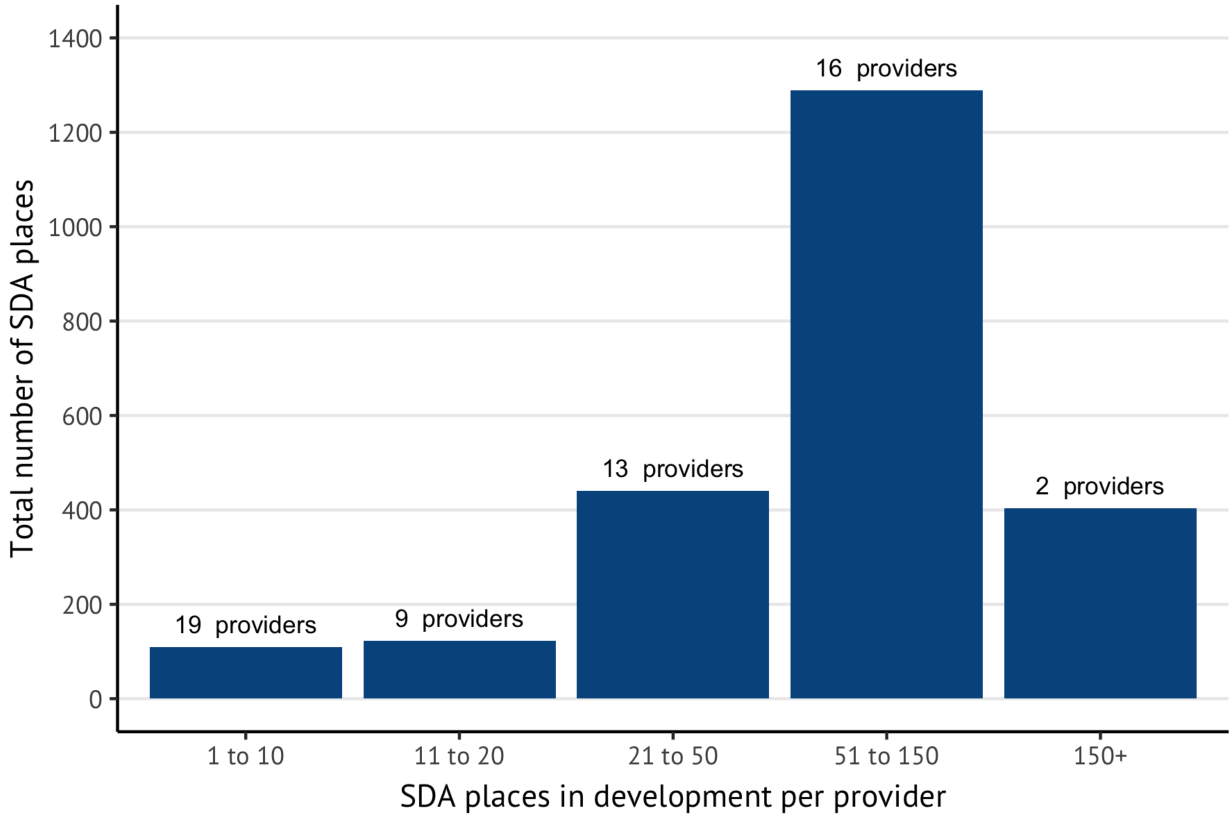
Table 5 - A comparison of the estimated number of SDA places by provider type over time

Provider type	Dec 2018	Sep 2019	Nov 2020	Aug 2021
Community housing provider	891	502	227	299
Not-for-profit housing provider	90	404	305	380
Private housing provider	217	555	1064	1368
Not-for-profit disability service provider	234	247	167	229
Private disability service provider	33	54	21	12
Government	0	0	15	78
Other	0	0	8	0
Prefer not to say	53	4	10	0
TOTAL	**1,518**	**1,766**	**1,817**	**2,366**

The previous survey identified that there had been a decrease in the number of SDA places in the pipeline for all provider types except private housing providers, for which development activity had almost doubled (see Table 5). However, with the exception of private disability service providers, development activity has increased across most provider types this year. This was particularly evident for private housing providers, who have reported the highest number of SDA places in the pipeline since September 2019 (see Table 5 and Figure 20).

Figure 21 illustrates SDA providers by number of SDA places in development. In contrast to the previous survey, the number of providers who are developing between 51-150 SDA places has more than doubled. This suggests that the SDA market is expanding quite quickly and more providers are experiencing rapid growth. These providers account for more than half (54.5%) of the total pipeline.

Figure 21 - SDA providers by scale of their development activity (*n* = 59)

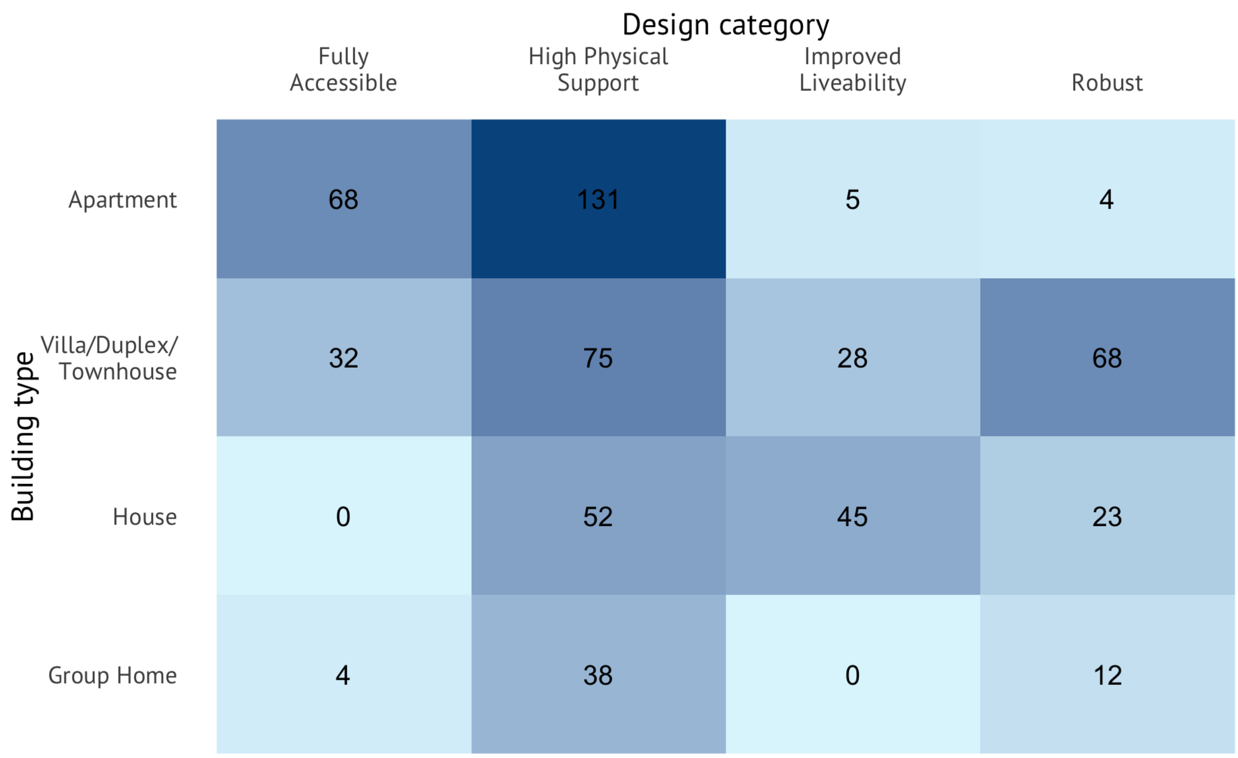


SDA supply pipeline: State and Territory overview

New South Wales

A total of 408 dwellings or 585 SDA places are reported to be in development in New South Wales, an increase in the number of places reported in the previous survey (440 places). The greatest number of SDA places are accounted for by High Physical Support apartments (131 places), followed by High Physical Support villas/duplexes/townhouses (75 places). There is an equal number of Fully Accessible apartments and Robust villas/duplexes/townhouses (68 places for each). See Figure 22. In comparison to the previous survey, there are less Improved Liveability dwellings in development across all building types.

Figure 22 - Estimated number of SDA places across building type and design category in New South Wales (*n* = 585)



As can be seen in Table 6, more than two thirds (69.4%) of SDA places in New South Wales are contractually committed to build or are under construction. Furthermore, as shown in Table 7, 44.8% of SDA places are being developed by private housing providers, followed by not-for-profit housing providers (20.2%).

Table 6 - Estimated number and percentage (%) of SDA dwellings and places by development status in New South Wales

Development status	Number of dwellings	% of dwellings	Number of places	% of places
Construction completed, pending enrolment with the NDIA	0	0	0	0
Under construction	188	46.1	253	43.2
Development stalled	8	2.0	13	2.2
Development & building approval completed & contractually committed to build	93	22.8	153	26.2
Land secured, waiting for building approval and/or finance approval	111	27.2	154	26.3
Unknown	8	2.0	12	2.1
TOTAL	**408**	**100**	**585**	**100**

Note: The 12 SDA places that are listed as 'unknown' are not missing data; rather this category is used to describe properties that were included from the 2020 pipeline data for which the current development status is unknown

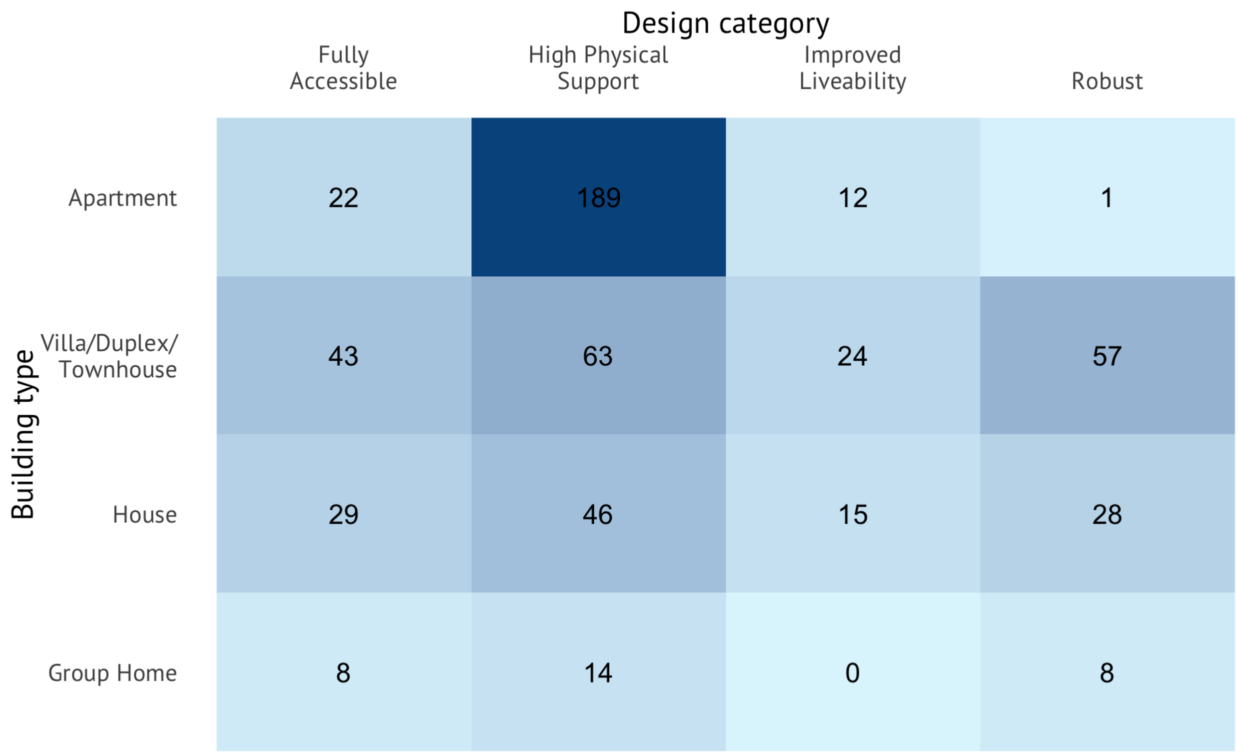
Table 7 - Estimated number and percentage (%) of SDA dwellings and places by provider type in New South Wales

Provider type	Number of dwellings	% of dwellings	Number of places	% of places
Community housing provider	99	24.3	112	19.1
Not-for-profit housing provider	73	17.9	118	20.2
Private housing provider	179	43.9	262	44.8
Not-for-profit disability service provider	57	14.0	93	15.9
Private disability service provider	0	0	0	0
Government	0	0	0	0
TOTAL	**408**	**100**	**585**	**100**

Victoria

A total of 416 dwellings or 559 SDA places are reported to be in development in Victoria, an increase in the number of places previously reported (478 places). One third (189 places) of SDA places are accounted for by High Physical Support apartments, followed by High Physical Support villas/duplexes/townhouses (63 places) and Robust villas/duplexes/townhouses (57 places). Refer to Figure 23. In comparison to the previous survey, there are more villas/duplexes/townhouses in development across all design categories except Fully Accessible.

Figure 23 - Estimated number of SDA places across building type and design category in Victoria (*n* = 559)



More than half (51.7%) of Victoria's SDA places are contractually committed to build or are under construction and 3.9% of places are pending enrolment with the NDIA. See Table 8. Almost half (48.5%) of SDA places in development were reported by private housing providers (refer to Table 9).

Table 8 - Estimated number and percentage (%) of SDA dwellings and places by development status in Victoria

Development status	Number of dwellings	% of dwellings	Number of places	% of places
Construction completed, pending enrolment with the NDIA	18	4.3	22	3.9
Under construction	193	46.4	217	38.8
Development stalled	18	4.3	18	3.2
Development & building approval completed & contractually committed to build	45	10.8	72	12.9
Land secured, waiting for building approval and/or finance approval	109	26.2	170	30.4
Unknown	33	7.9	60	10.7
TOTAL	**416**	**100**	**559**	**100**

Note: The 60 SDA places that are listed as 'unknown' are not missing data; rather this category is used to describe properties that were included from the 2020 pipeline data for which the current development status is unknown.

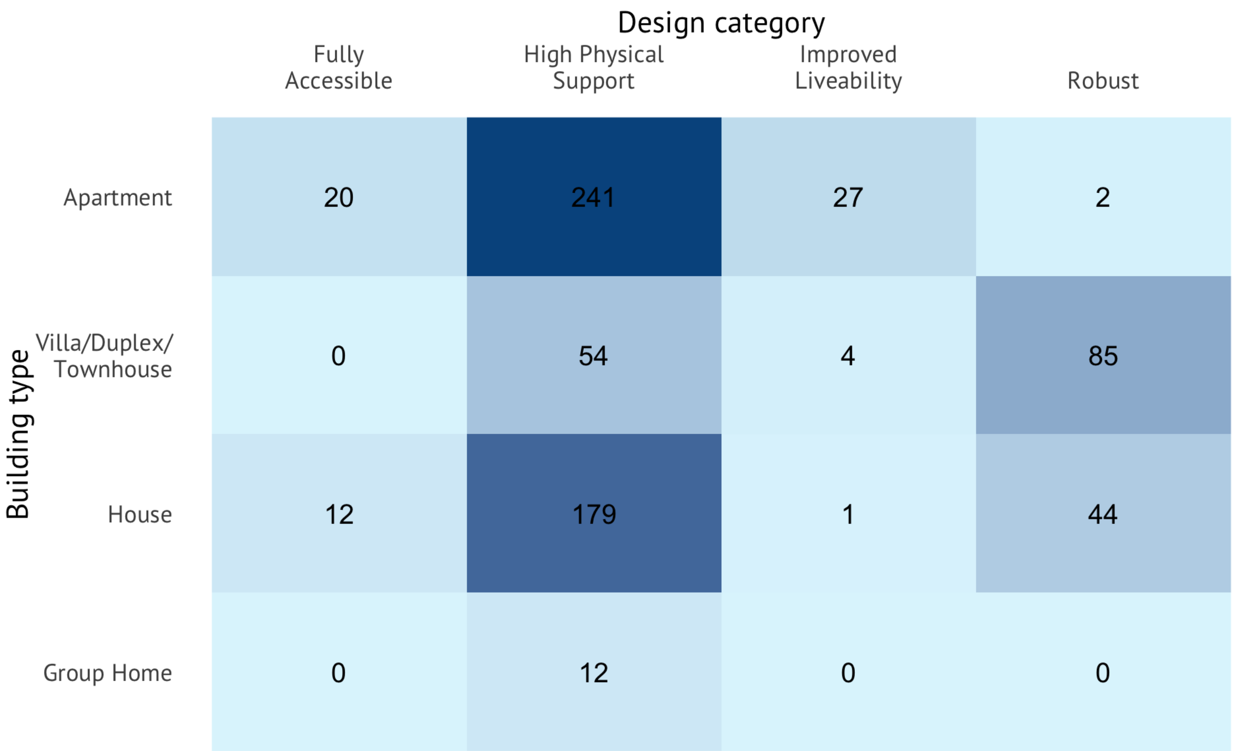
Table 9 - Estimated number and percentage (%) of SDA dwellings and places by provider type in Victoria

Provider type	Number of dwellings	% of dwellings	Number of places	% of places
Community housing provider	84	20.2	94	16.8
Not-for-profit housing provider	52	12.5	52	9.3
Private housing provider	223	53.6	271	48.5
Not-for-profit disability service provider	18	4.3	52	9.3
Private disability service provider	6	1.4	12	2.1
Government	33	7.9	78	14.0
TOTAL	**416**	**100**	**559**	**100**

Queensland

A total of 462 dwellings or 681 SDA places are estimated to be in development in Queensland, an increase in the number of SDA places reported in the previous survey (520 places). More than one third (35.4%) of SDA places are accounted for by High Physical Support apartments, followed by High Physical Support houses (179 places) and Robust villas/duplexes/townhouses (85 places). Refer to Figure 24. In comparison to the previous survey, the amount of SDA places accounted for by High Physical Support houses has more than doubled and all Robust dwellings have significantly increased across all build types except group homes.

Figure 24 - Estimated number of SDA places across building type and design category in Queensland (*n* = 681)



Almost half (44.9%) of all SDA places in development in Queensland are under construction while 20.2% of places have land secured and are waiting on building and/or finance approval. See Table 10. Three quarters (75.5%) of SDA places are being developed by private housing providers (refer to Table 11).

Table 10 - Estimated number and percentage (%) of SDA dwellings and places by development status in Queensland

Development status	Number of dwellings	% of dwellings	Number of places	% of places
Construction completed, pending enrolment with the NDIA	44	9.5	57	8.4
Under construction	235	50.9	306	44.9
Development stalled	0	0	0	0
Development & building approval completed & contractually committed to build	41	8.9	73	10.7
Land secured, waiting for building approval and/or finance approval	79	17.1	138	20.2
Unknown	63	13.6	107	15.7
TOTAL	**462**	**100**	**681**	**100**

Note: The 107 SDA places that are listed as 'unknown' are not missing data; rather this category is used to describe properties that were included from the 2020 pipeline data for which the current development status is unknown.

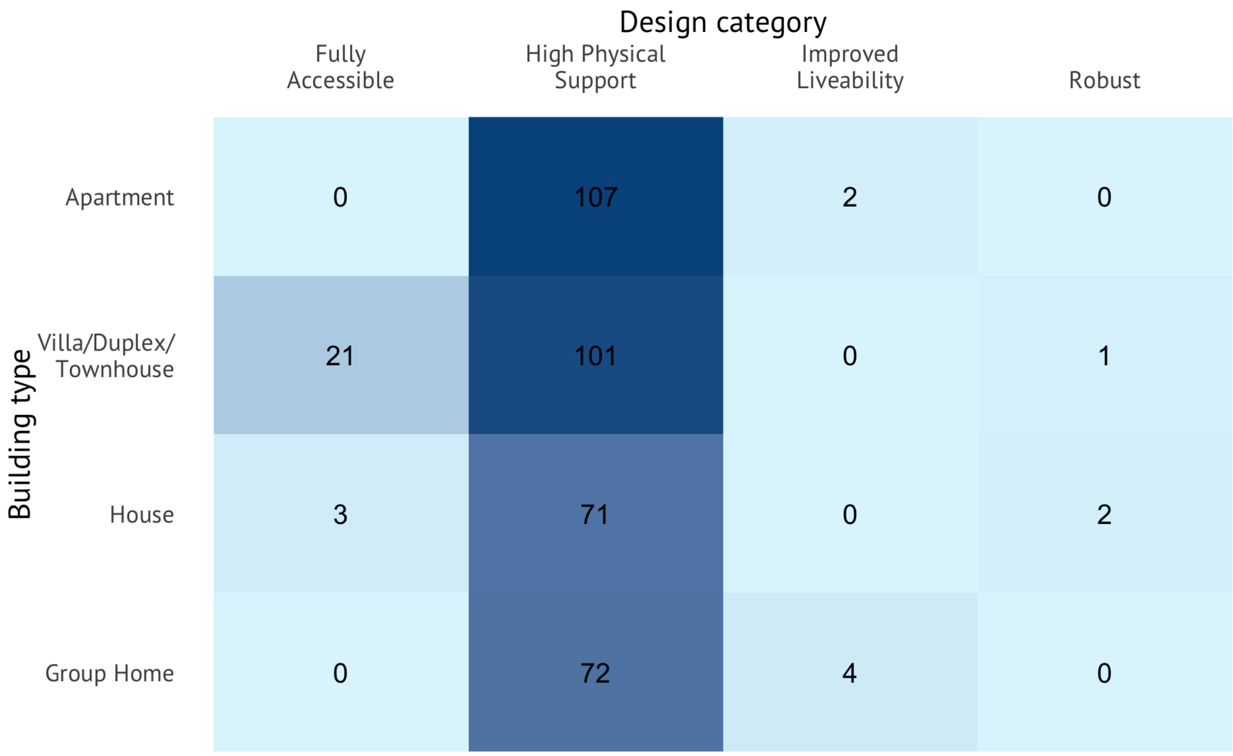
Table 11 - Estimate number and percentage (%) of SDA dwellings and places by provider type in Queensland

Provider type	Number of dwellings	% of dwellings	Number of places	% of places
Community housing provider	22	4.8	33	4.8
Not-for-profit housing provider	52	11.3	62	9.1
Private housing provider	323	69.9	514	75.5
Not-for-profit disability service provider	65	14.1	72	10.6
Private disability service provider	0	0	0	0
Government	0	0	0	0
TOTAL	**462**	**100**	**681**	**100**

Western Australia

A total of 248 dwellings or 384 SDA places are in development in Western Australia, an increase in the number of SDA places reported in the previous survey (290 places). As can be seen in Figure 25, the majority of SDA places are High Physical Support, with 107 places accounted for by apartments, followed by 101 places accounted for by villas/duplexes/townhouses, 72 places accounted for by group homes and 71 places accounted for by houses. In comparison to the previous survey, there are more Fully Accessible villas/duplexes/townhouses this year but no Fully Accessible apartments were reported. There was also a very minimal increase in the number of Robust SDA places, with an additional 2 places reported this year.

Figure 25 - Estimated number of SDA places across building type and design category in Western Australia (*n* = 384)



Unlike the previous survey, there are more SDA places currently under construction and the amount of SDA places for which land has been secured, waiting for building and/or finance approval has also considerably increased. See Table 12. The vast majority of SDA places in development were reported by private housing providers (74.5%; see Table 13).

Table 12 - Estimated number and percentage (%) of SDA dwellings and places by development status in Western Australia

Development status	Number of dwellings	% of dwellings	Number of places	% of places
Construction completed, pending enrolment with the NDIA	0	0	0	0
Under construction	59	23.8	72	18.8
Development stalled	0	0	0	0
Development & building approval completed & contractually committed to build	23	9.3	33	8.6
Land secured, waiting for building approval and/or finance approval	112	45.2	220	57.3
Unknown	54	21.8	59	15.4
TOTAL	**248**	**100**	**384**	**100**

Note: The 59 SDA places that are listed as 'unknown' are not missing data; rather this category is used to describe properties that were included from the 2020 pipeline data for which the current development status is unknown.

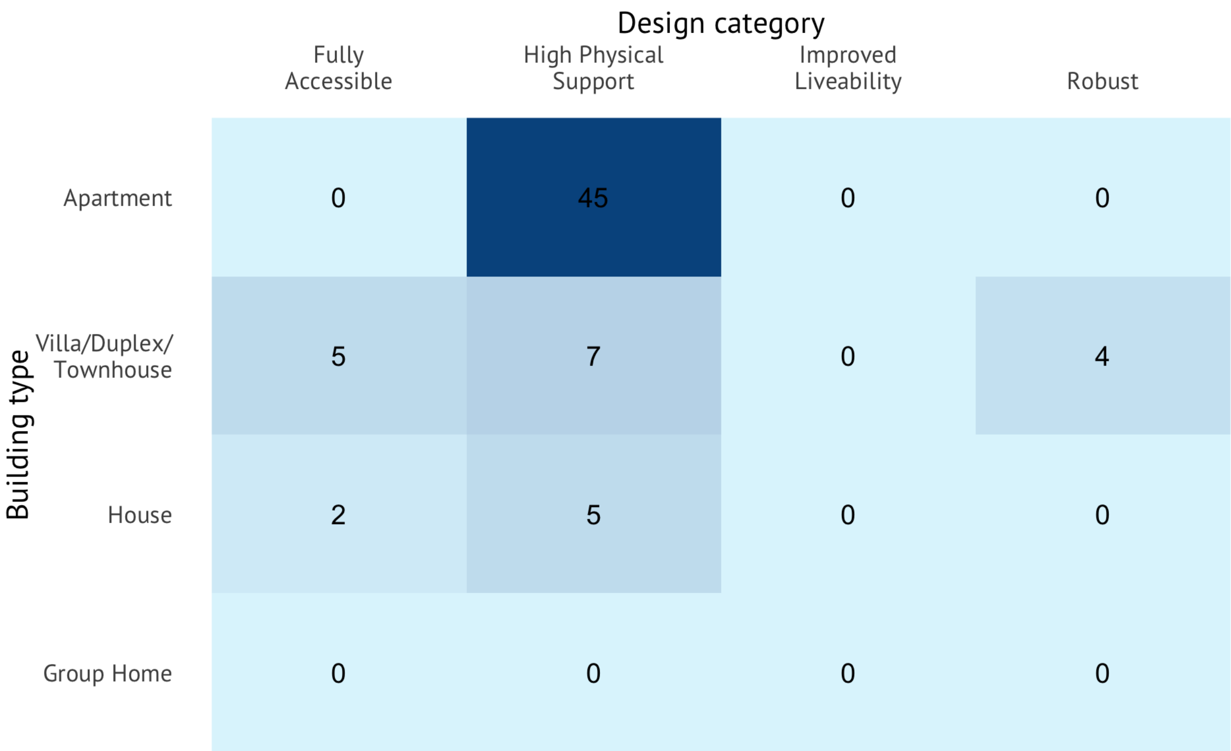
Table 13 - Estimated number and percentage (%) of SDA dwellings and places by provider type in Western Australia

Provider type	Number of dwellings	% of dwellings	Number of places	% of places
Community housing provider	2	0.8	2	0.5
Not-for-profit housing provider	50	20.2	96	25.0
Private housing provider	196	79.0	286	74.5
Not-for-profit disability service provider	0	0	0	0
Private disability service provider	0	0	0	0
Government	0	0	0	0
TOTAL	**248**	**100**	**384**	**100**

South Australia

A total of 64 dwellings or 68 SDA places are estimated to be in development in South Australia. This is a slight decline to the number of SDA places reported in the previous survey (77 places). Two thirds of SDA places (66.2%) are accounted for High Physical Support apartments, followed by High Physical Support villas/duplexes/townhouses (7 places). Refer to Figure 26. In comparison to the previous survey, 0 Improved Liveability places were reported this year; however, there are now 4 Robust SDA places in the pipeline.

Figure 26 - Estimated number of SDA places across building type and design category in South Australia (*n* = 68)



As can be seen in Table 14, the majority of SDA places (86.8%) are under construction and are also being built by not-for-profit private housing providers (61.8%; refer to Table 15).

Table 14 - Estimated number and percentage (%) of SDA dwellings and places by development status in South Australia

Development status	Number of dwellings	% of dwellings	Number of places	% of places
Construction completed, pending enrolment with the NDIA	0	0	0	0
Under construction	56	87.5	59	86.8
Development stalled	0	0	0	0
Development & building approval completed & contractually committed to build	5	7.8	5	7.4
Land secured, waiting for building approval and/or finance approval	3	4.7	4	5.9
Unknown	0	0	0	0
TOTAL	**64**	**100**	**68**	**100**

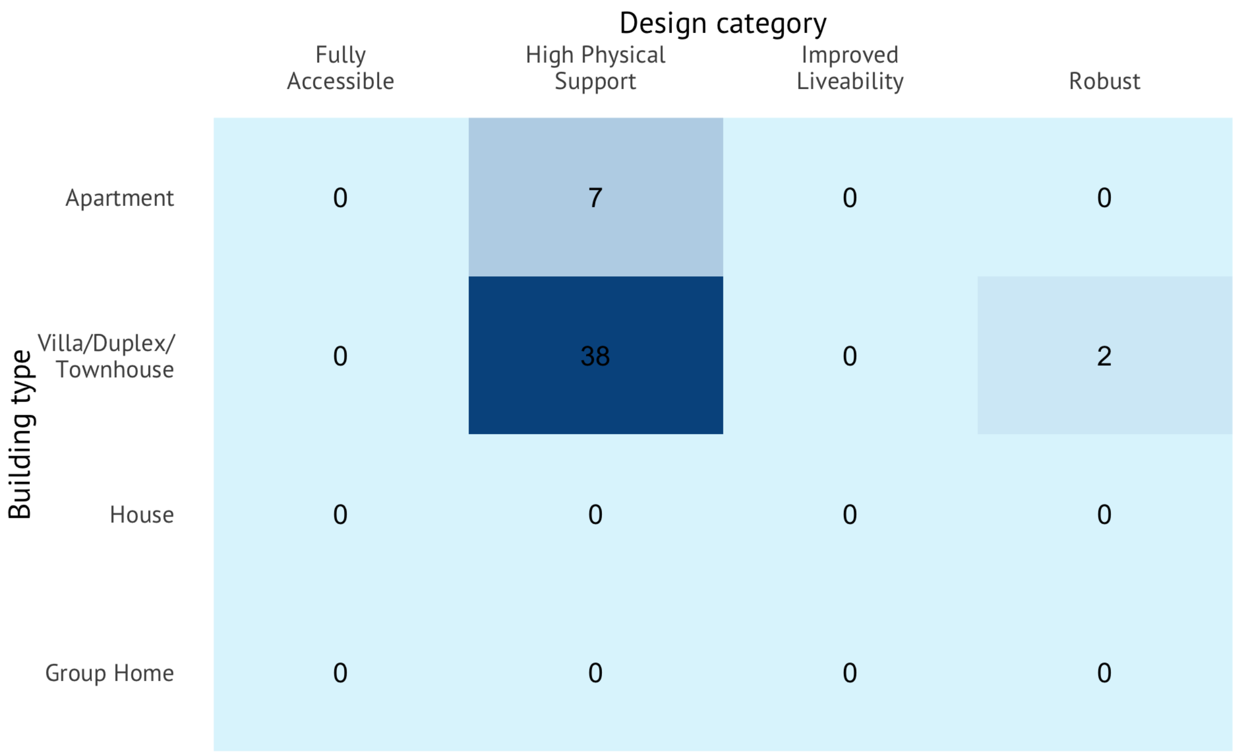
Table 15 - Estimated number and percentage (%) of SDA dwellings and places by provider type in South Australia

Provider type	Number of dwellings	% of dwellings	Number of places	% of places
Community housing provider	13	20.3	13	19.1
Not-for-profit housing provider	40	62.5	42	61.8
Private housing provider	11	17.2	13	19.1
Not-for-profit disability service provider	0	0	0	0
Private disability service provider	0	0	0	0
Government	0	0	0	0
TOTAL	**64**	**100**	**68**	**100**

Tasmania

A total of 27 dwellings or 47 SDA places are in development in Tasmania; a notable increase from the previous survey (2 places). Almost all SDA places can be accounted for by High Physical Support villas/duplexes/townhouses (38 places) and apartments (7 places). There are also 2 Robust places in development. No other building types or design categories were reported (see Figure 27). In comparison to the previous survey, where only 1 High Physical Support and 1 Improved Liveability apartment was reported, it is clear there is considerable growth in High Physical Support dwellings.

Figure 27 - Estimated number of SDA places across building type and design category in Tasmania (*n* = 47)



All SDA places currently have land secured and are waiting for building and/or financial approval. As can be seen in Table 16, there are no places under construction or pending enrolment with the NDIA. Unlike New South Wales, Victoria, Queensland and Western Australia, the vast majority of SDA places in development were reported by community housing providers (95.7%), with only 4.3% of places reported by private housing providers. See Table 17.

Table 16 - Estimated number and percentage (%) of SDA dwellings and places by development status in Tasmania

Development status	Number of dwellings	% of dwellings	Number of places	% of places
Construction completed, pending enrolment with the NDIA	0	0	0	0
Under construction	0	0	0	0
Development stalled	0	0	0	0
Development & building approval completed & contractually committed to build	0	0	0	0
Land secured, waiting for building approval and/or finance approval	27	100	47	100
Unknown	0	0	0	0
TOTAL	**27**	**100**	**47**	**100**

Table 17 - Estimated number and percentage (%) of SDA dwellings and places by provider type in Tasmania

Provider type	Number of dwellings	% of dwellings	Number of places	% of places
Community housing provider	25	92.6	45	95.7
Not-for-profit housing provider	0	0	0	0
Private housing provider	2	7.4	2	4.3
Not-for-profit disability service provider	0	0	0	0
Private disability service provider	0	0	0	0
Government	0	0	0	0
TOTAL	**27**	**100**	**47**	**100**

Australian Capital Territory

A total of 30 dwellings or 30 SDA places are reported to be in development in the Australian Capital Territory; an increase compared to the previous survey (10 places). As shown in Figure 28, all SDA places can be accounted for by High Physical Support apartments. Similar to the previous survey, no other building types or design categories were reported.

Figure 28 - Estimated number of SDA places across building type and design category in Australian Capital Territory (*n* = 30)

Building type \ Design category	Fully Accessible	High Physical Support	Improved Liveability	Robust
Apartment	0	30	0	0
Villa/Duplex/ Townhouse	0	0	0	0
House	0	0	0	0
Group Home	0	0	0	0

As can be seen in Table 18, two thirds (66.7%) of SDA places are under construction and are also being developed by private housing providers (66.7%; refer Table 19).

Table 18 - Estimated number and percentage (%) of SDA dwellings and places by development status in Australian Capital Territory

Development status	Number of dwellings	% of dwellings	Number of places	% of places
Construction completed, pending enrolment with the NDIA	0	0	0	0
Under construction	20	66.7	20	66.7
Development stalled	0	0	0	0
Development & building approval completed & contractually committed to build	10	33.3	10	33.3
Land secured, waiting for building approval and/or finance approval	0	0	0	0
Unknown	0	0	0	0
TOTAL	**30**	**100**	**30**	**100**

Table 19 - Estimated number and percentage (%) of SDA dwellings and places by provider type in Australian Capital Territory

Provider type	Number of dwellings	% of dwellings	Number of places	% of places
Community housing provider	0	0	0	0
Not-for-profit housing provider	10	33.3	10	33.3
Private housing provider	20	66.7	20	66.7
Not-for-profit disability service provider	0	0	0	0
Private disability provider	0	0	0	0
Government	0	0	0	0
TOTAL	**30**	**100**	**30**	**100**

Northern Territory

A total of 6 dwellings or 12 SDA places[10] are reported to be in development in the Australian Capital Territory; an increase compared to the previous survey in which no SDA places were reported. As can be seen in Figure 29, all known SDA places can be accounted for by houses (an equal split between Fully Accessible and Robust). There are 6 SDA places for which the design category is unknown.

Figure 29 - Estimated number of SDA places across building type and design category in Northern Territory (*n* = 12)

Building type \ Design category	Fully Accessible	High Physical Support	Improved Liveability	Robust	Unknown
Apartment	0	0	0	0	0
Villa/Duplex/ Townhouse	0	0	0	0	0
House	3	0	0	3	6
Group Home	0	0	0	0	0

Note: Design category was not reported for 6 SDA places

As shown in Table 20, all places have land secured, and are waiting for building and/or finance approval. Furthermore, unlike all other states and territories apart from Tasmania, all of the SDA places in the pipeline are being developed by not-for-profit disability service providers (although there are 2 dwellings for which the number of SDA places are unknown are being developed by private housing providers (see Table 21).

[10] The number of SDA places for 2 dwellings being developed in NT was unknown. Therefore, 12 SDA places in the minimum number currently in the pipeline.

Table 20 - Estimated number and percentage (%) of SDA dwellings and places by development status in Northern Territory

Development status	Number of dwellings	% of dwellings	Number of places	% of places
Construction completed, pending enrolment with the NDIA	0	0	0	0
Under construction	0	0	0	0
Development stalled	0	0	0	0
Development & building approval completed & contractually committed to build	0	0	0	0
Land secured, waiting for building approval and/or finance approval	6	100	12	100
Unknown	0	0	0	0
TOTAL	**6**	**100**	**12**	**100**

Table 21 - Estimated number and percentage (%) of SDA dwellings and places by provider type in Northern Territory

Provider type	Number of dwellings	% of dwellings	Number of places	% of places
Community housing provider	0		0	0
Not-for-profit housing provider	0		0	0
Private housing provider	2	33.3	Unknown	Unknown
Not-for-profit disability service provider	4	66.6	12	100
Private disability provider	0		0	0
Government	0		0	0
TOTAL	**6**	**100**	**12**	**N/A**

Note: The number of SDA places are unknown for 2 dwellings being developed by private housing providers

Where is the new SDA being developed?

In this section, the distribution of new SDA development reported in each jurisdiction is shown relative to the national figures by building type and design category. Note that these figures do not represent all SDA development activity as some providers who may have SDA developments in progress did not respond to the survey.

New South Wales

Figure 30 - Proportion of SDA places by design category: A comparison between New South Wales and Australia

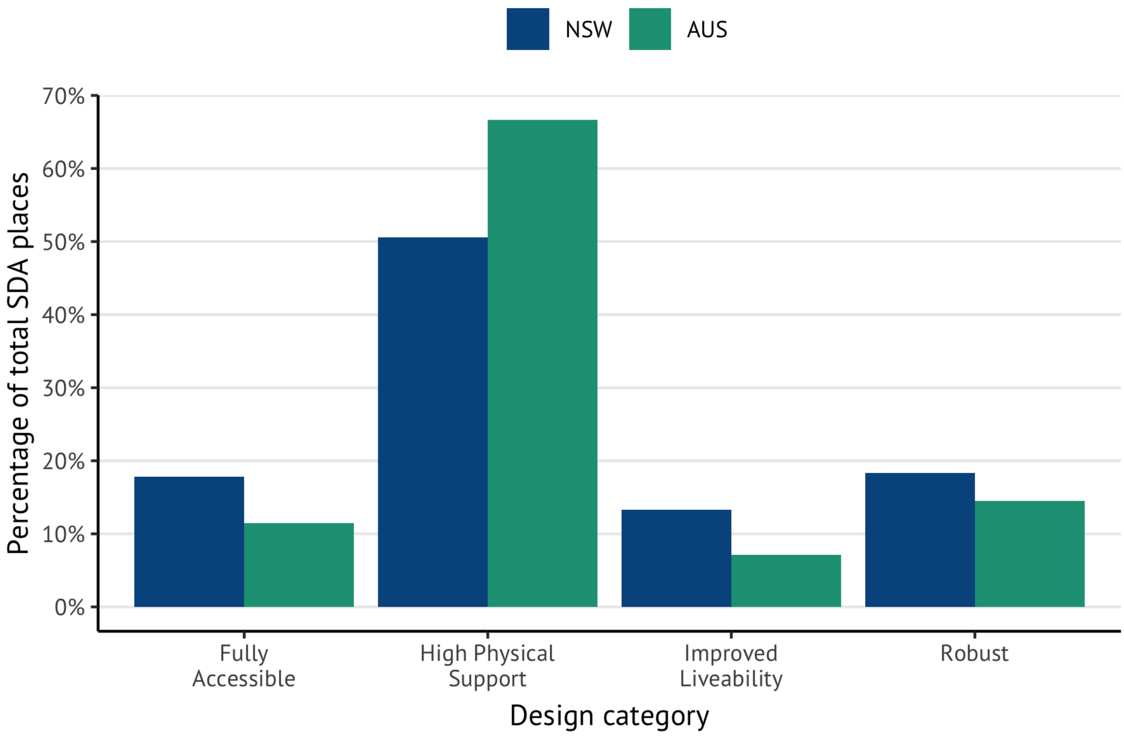
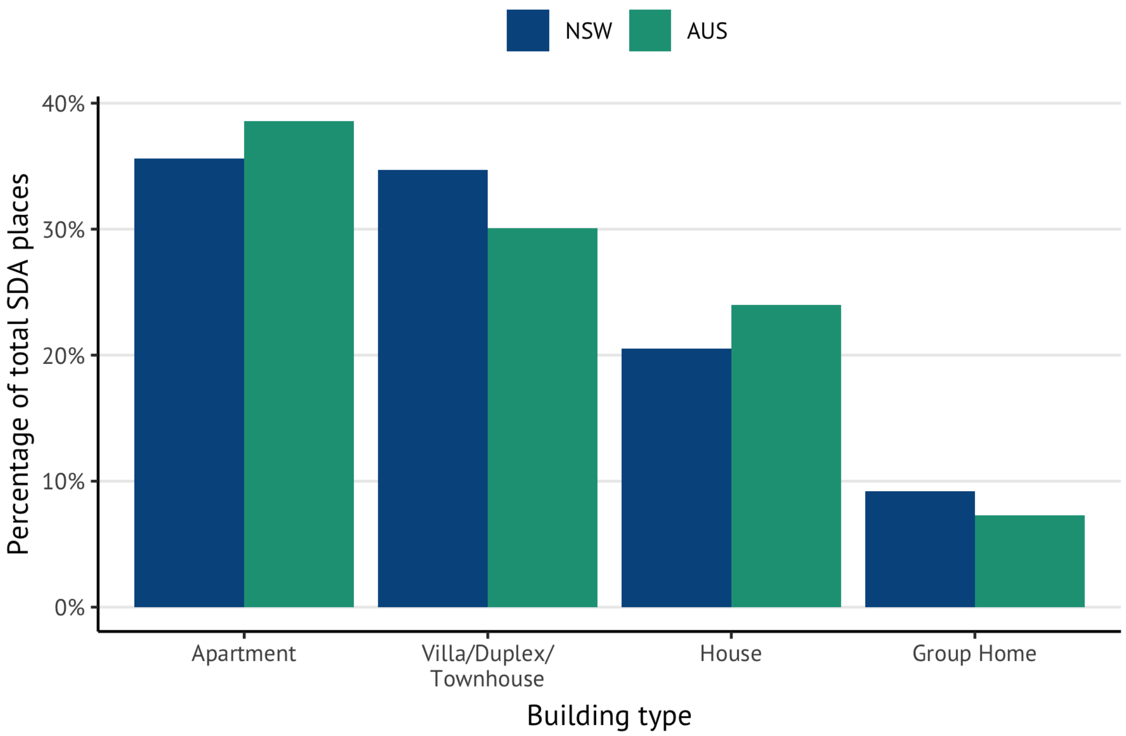


Figure 31 - Proportion of SDA places by building type: A comparison between New South Wales and Australia



Victoria

Figure 32 - Proportion of SDA places by design category: A comparison between Victoria and Australia

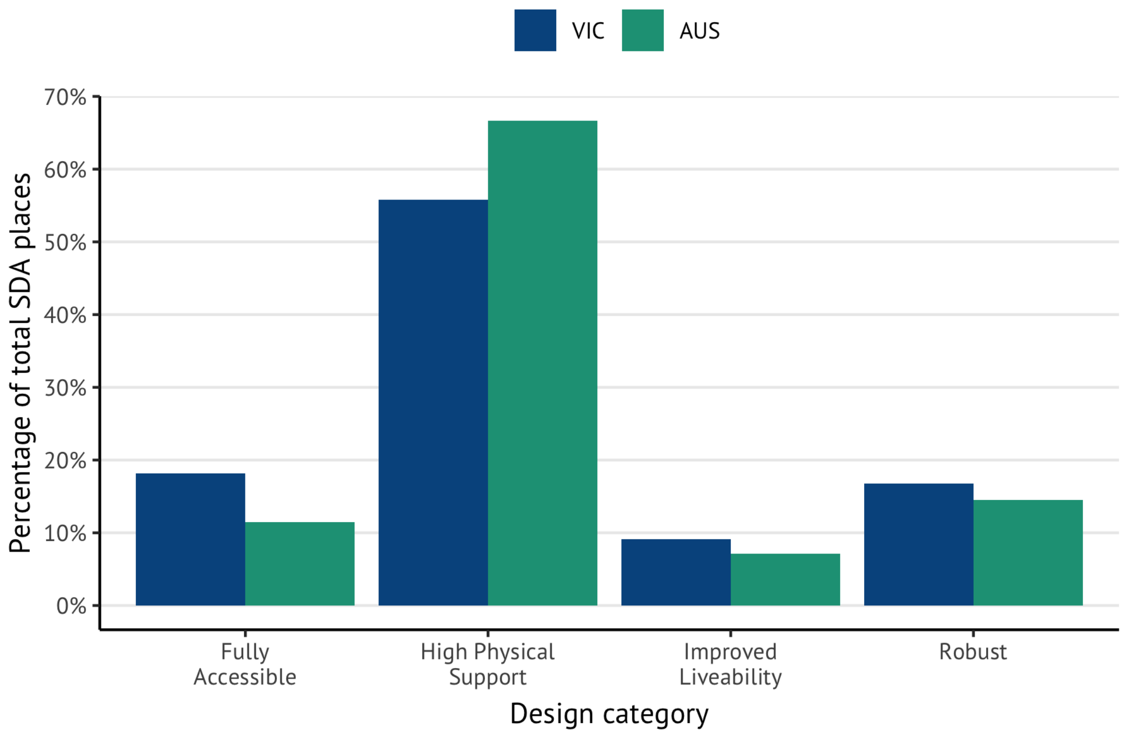
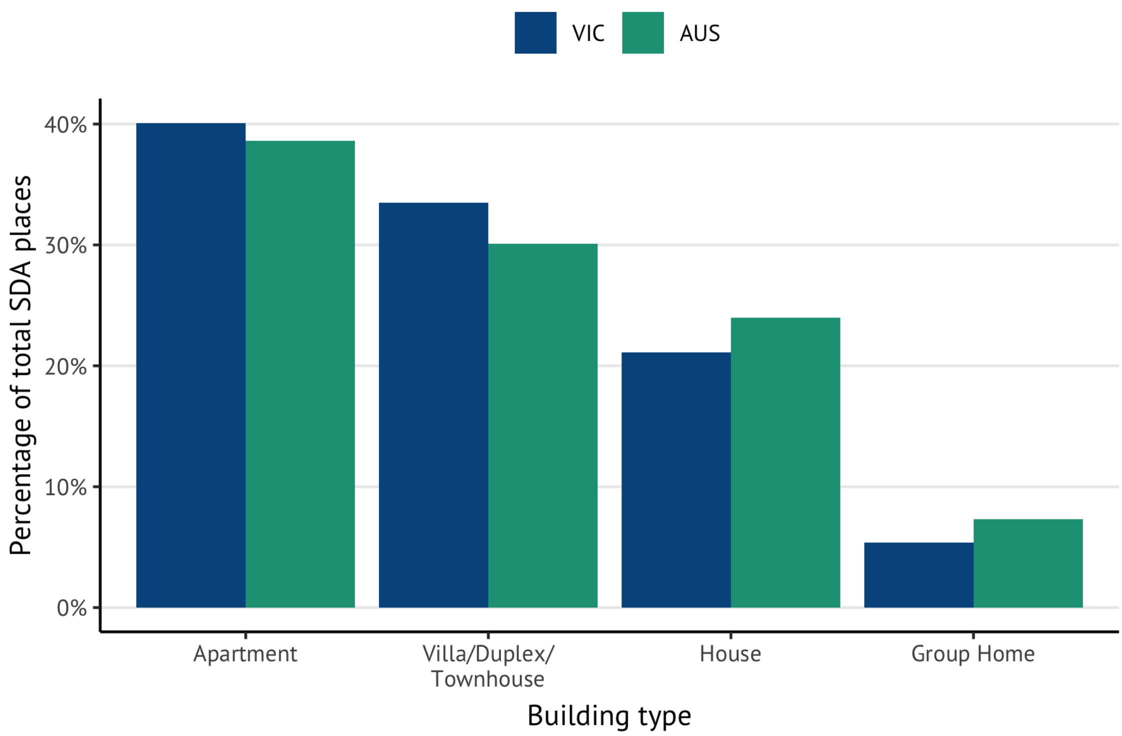


Figure 33 - Proportion of SDA places by building type: A comparison between Victoria and Australia



Queensland

Figure 34 - Proportion of SDA places by design category: A comparison between Queensland and Australia

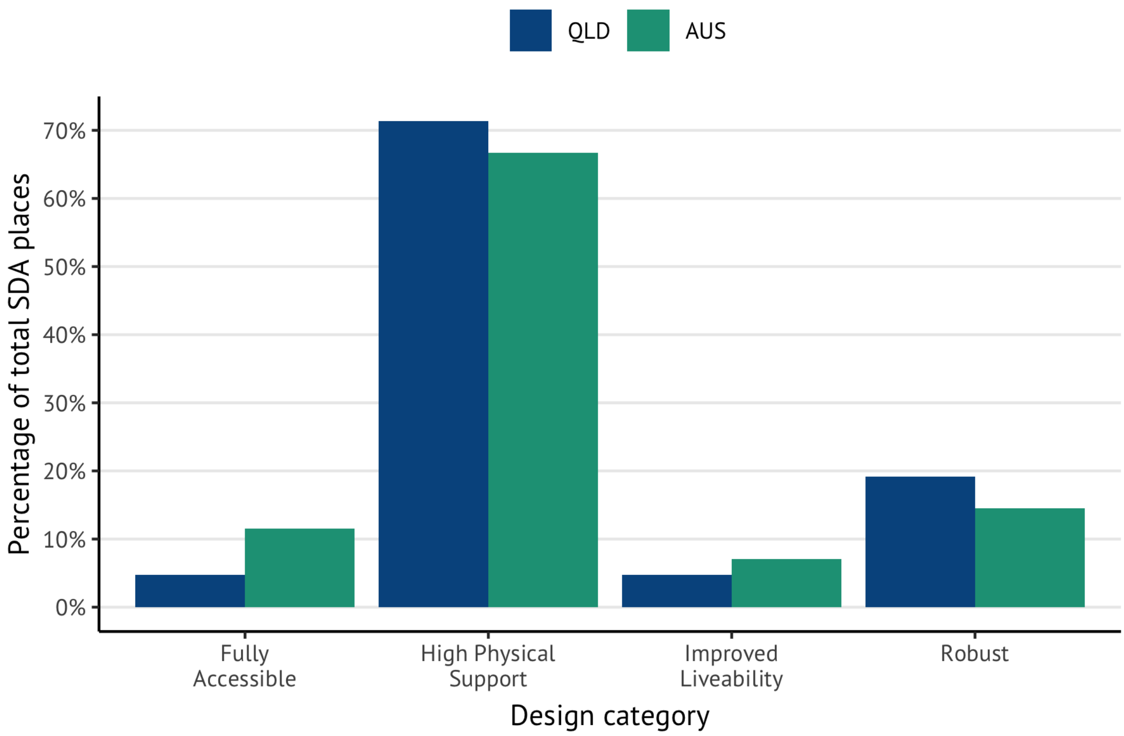
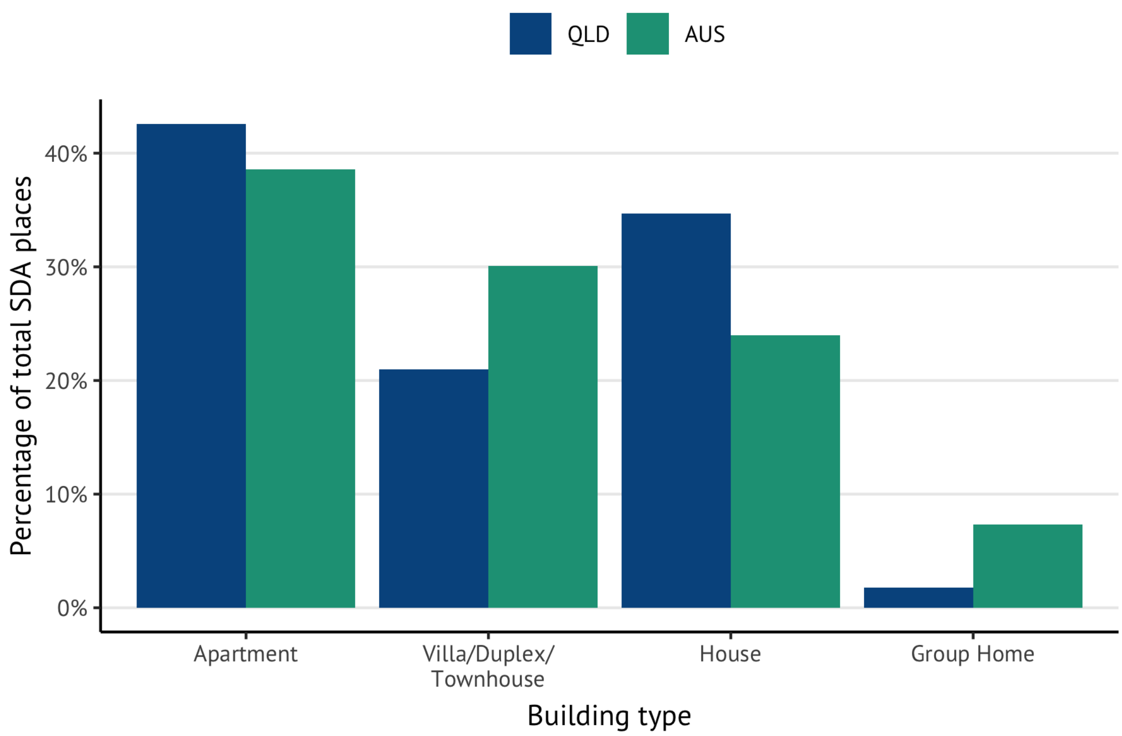


Figure 35 - Proportion of SDA places by building type: A comparison between Queensland and Australia



Western Australia

Figure 36 - Proportion of SDA places by design category: A comparison between Western Australia and Australia

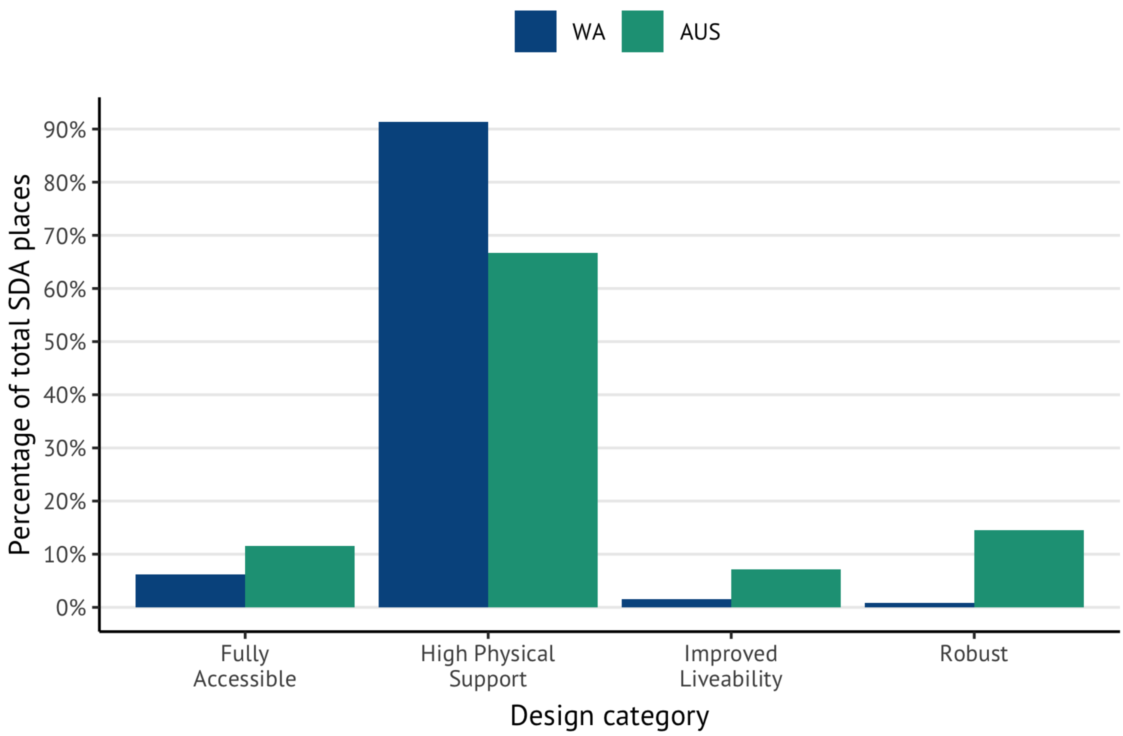
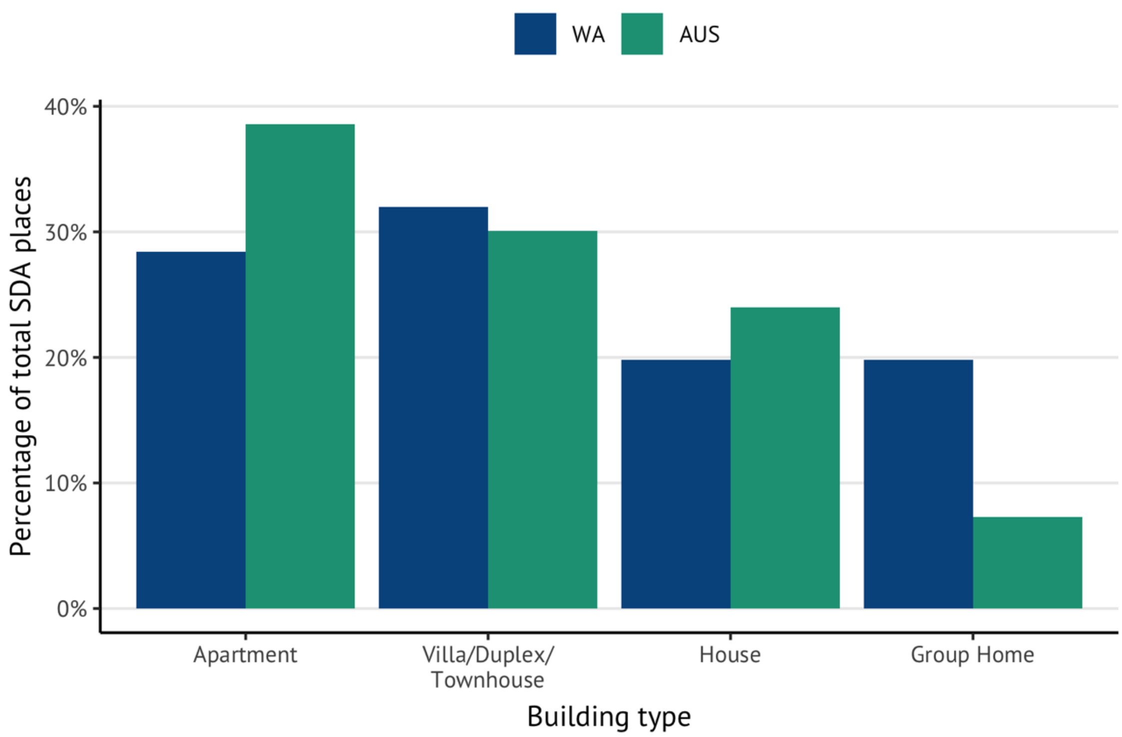


Figure 37 - Proportion of SDA places by building type: A comparison between Western Australia and Australia



South Australia

Figure 38 - Proportion of SDA places by design category: A comparison between South Australia and Australia

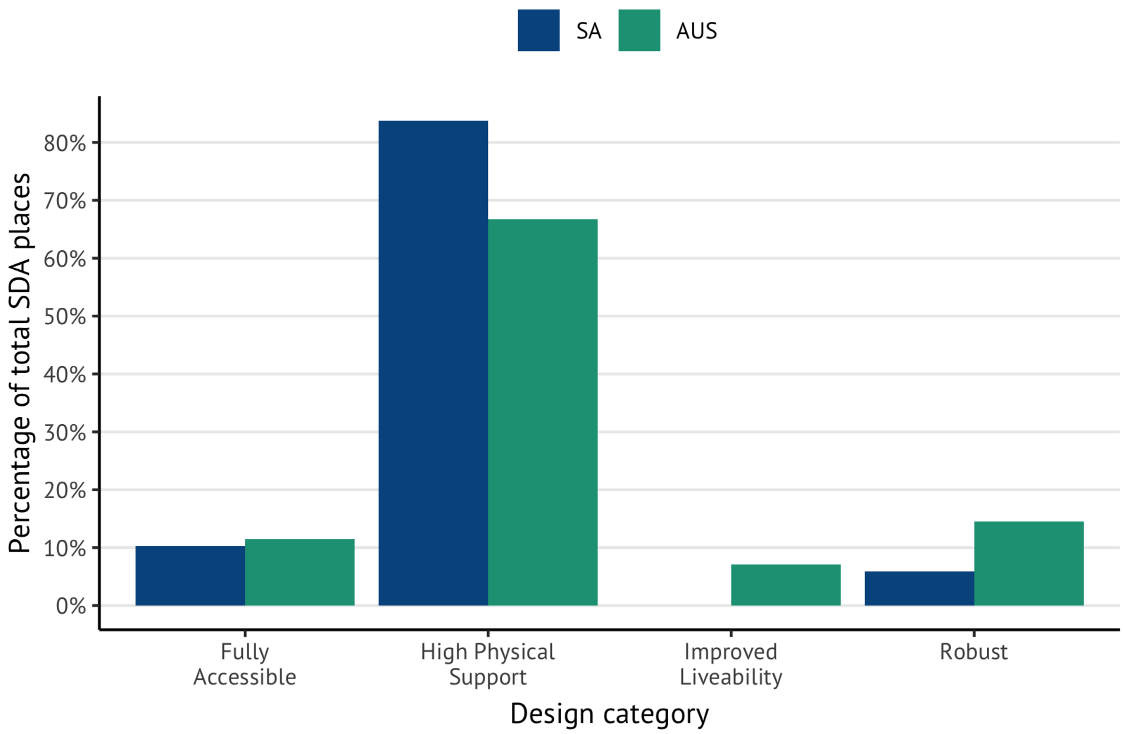
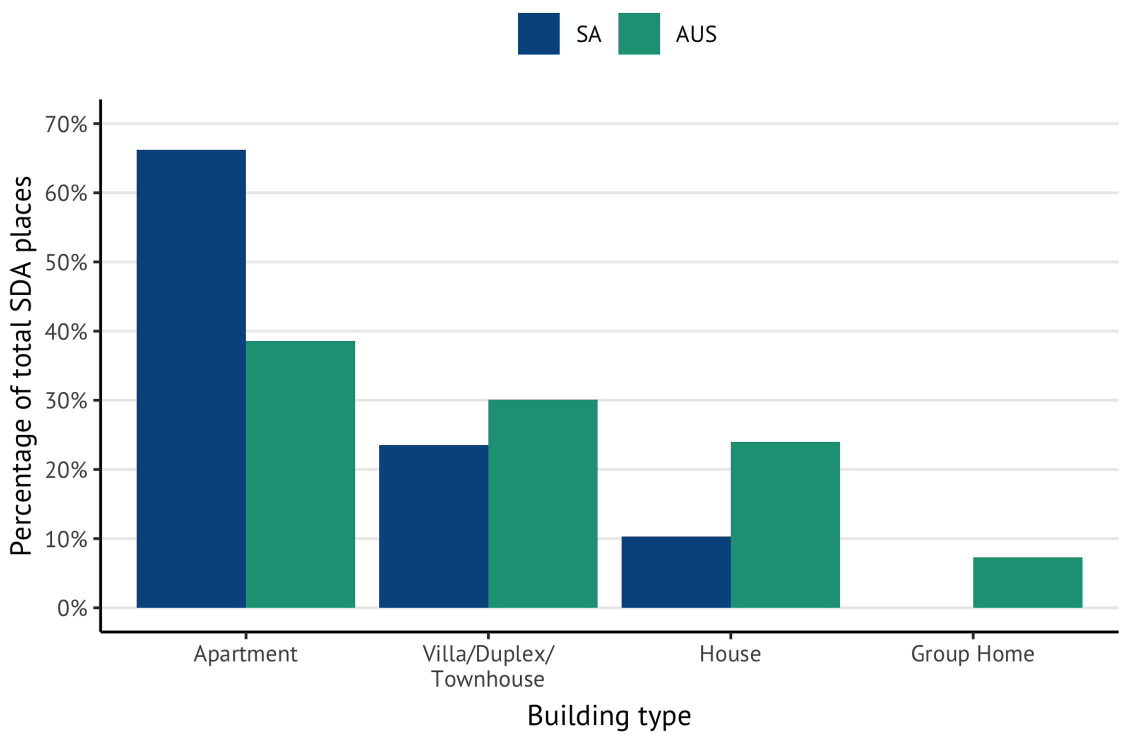


Figure 39 - Proportion of SDA places by building type: A comparison between South Australia and Australia



Tasmania

Figure 40 - Proportion of SDA places by design category: A comparison between Tasmania and Australia

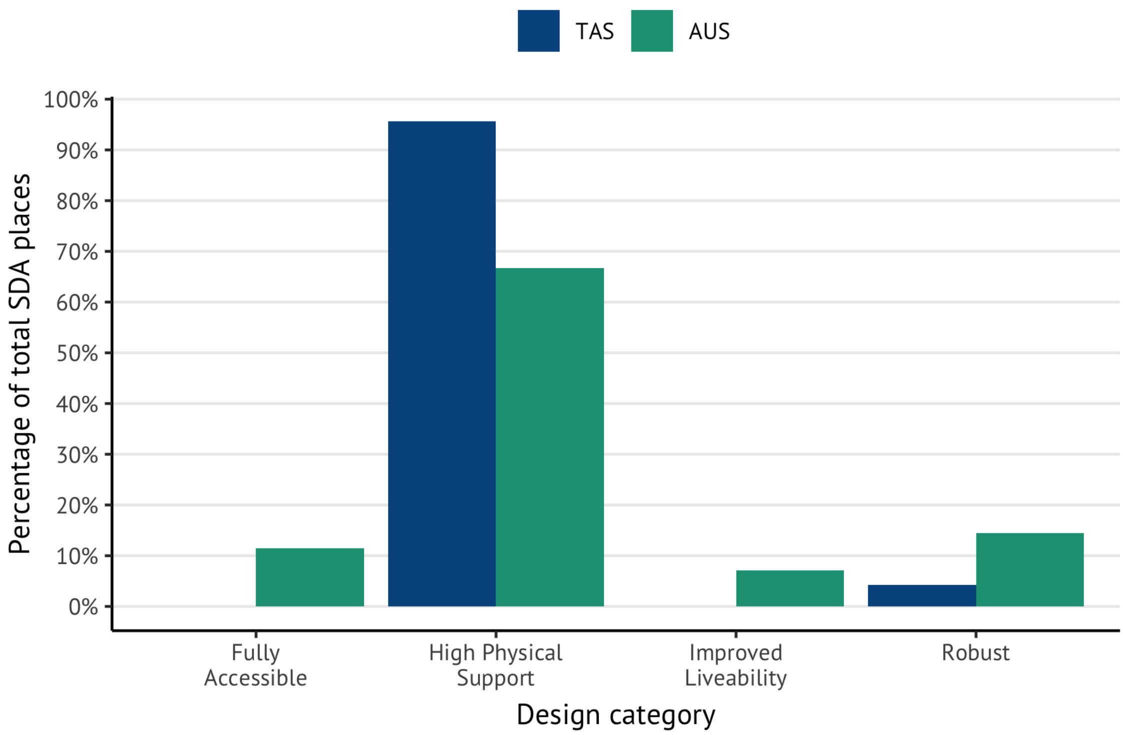
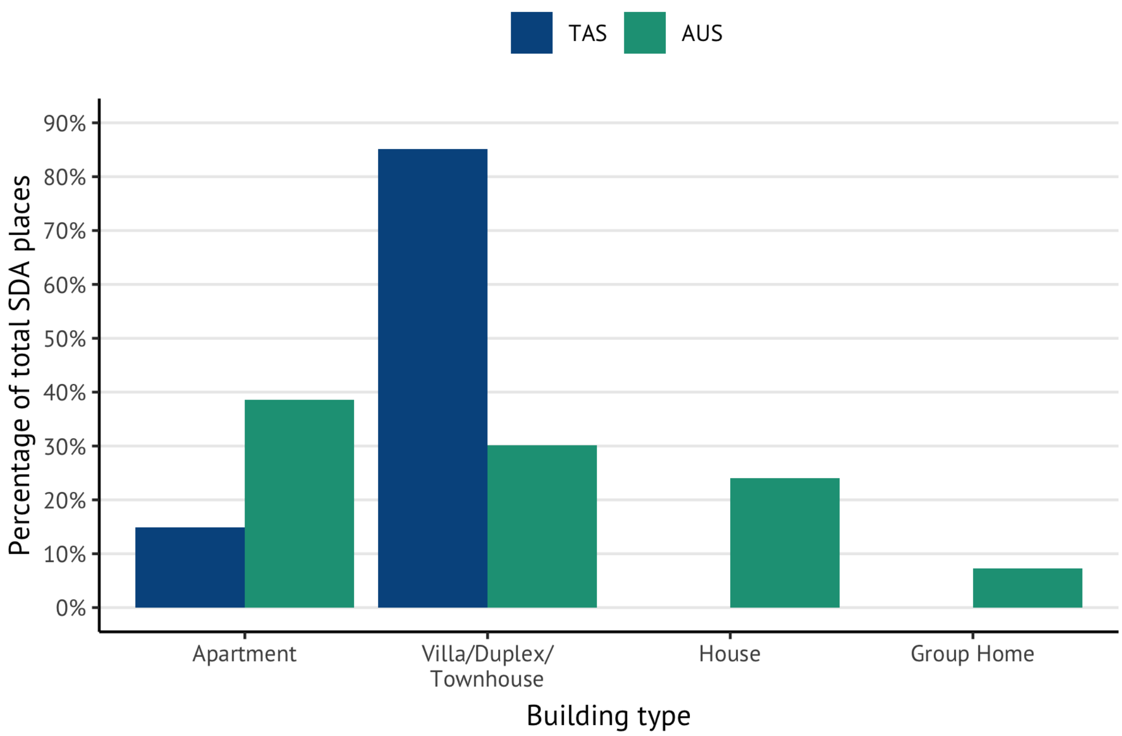


Figure 41 - Proportion of SDA places by building type: A comparison between Tasmania and Australia



Australian Capital Territory

Figure 42 - Proportion of SDA places by design category: A comparison between Australian Capital Territory and Australia

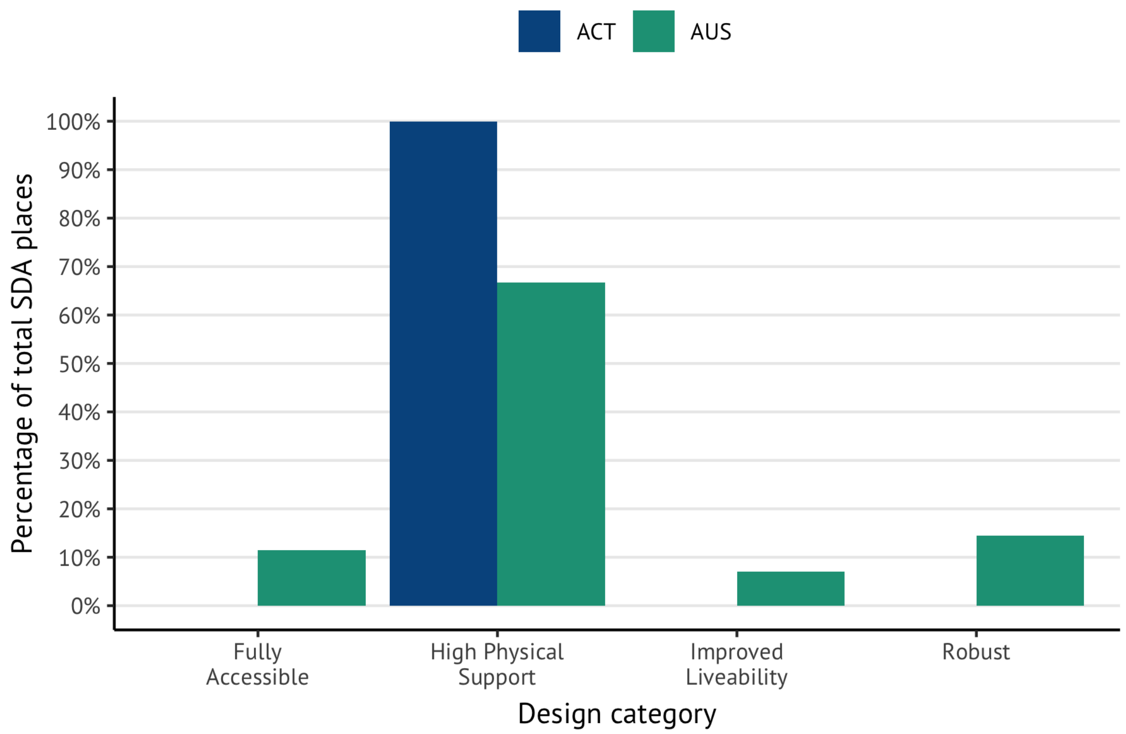
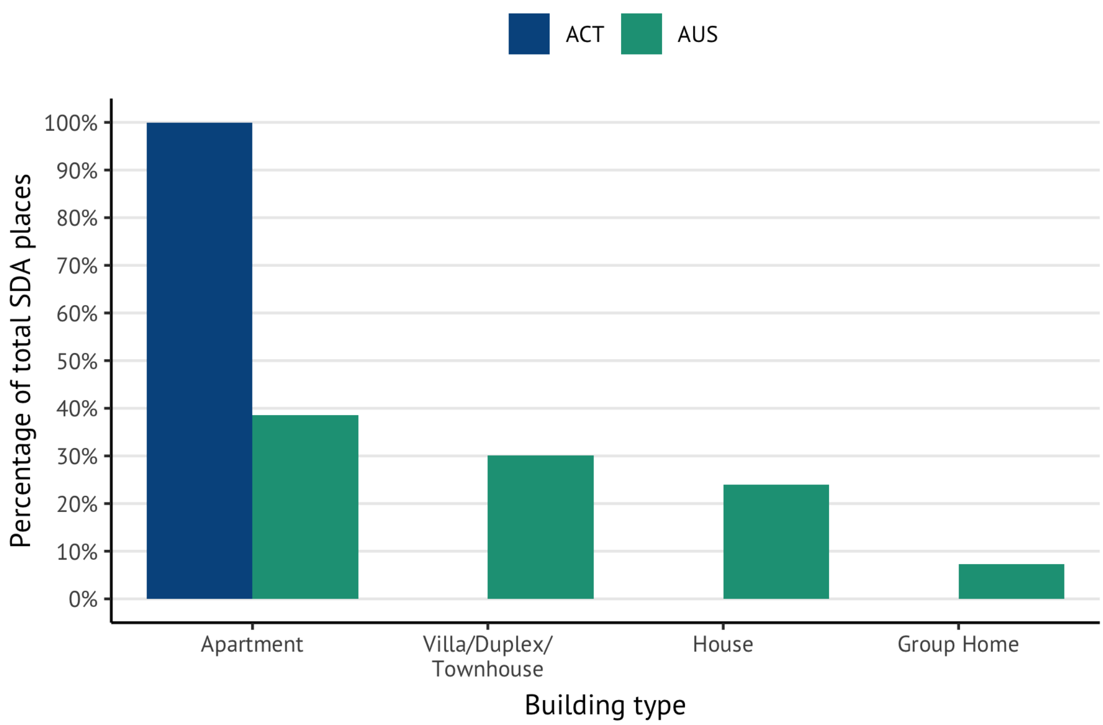
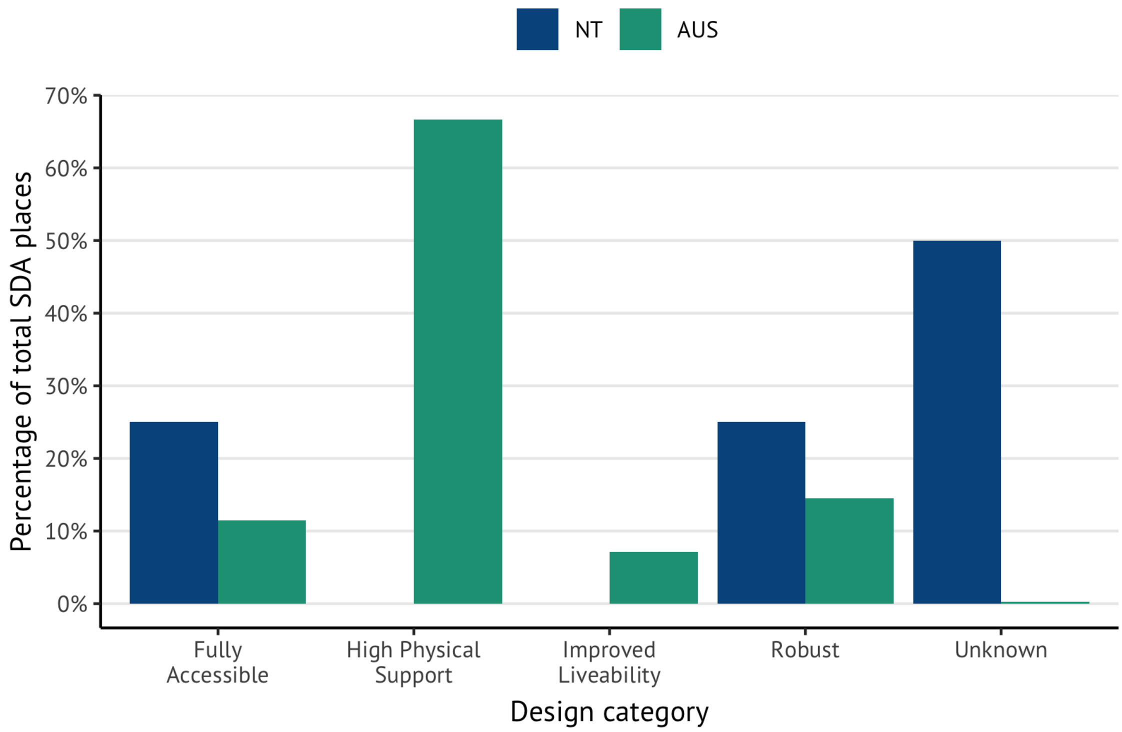


Figure 43 - Proportion of SDA places by building type: A comparison between Australian Capital Territory and Australia



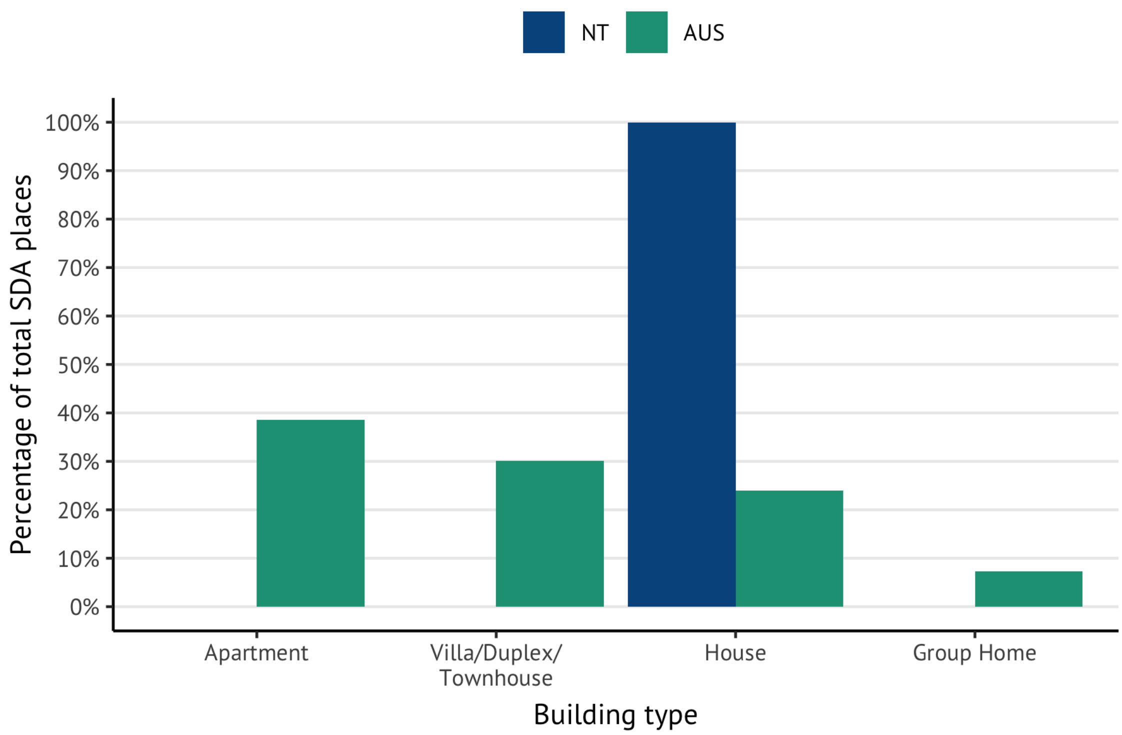
Northern Territory

Figure 44 - Proportion of SDA places by design category: A comparison between Northern Territory and Australia



Note: Design category was unknown for 6 SDA places

Figure 45 - Proportion of SDA places by building type: A comparison between Northern Territory and Australia



Note: Building type was unknown for 2 SDA dwellings for which the number of SDA places were also unknown

SA4 regions and NDIA data

This section presents the pipeline data (number of SDA dwellings and places) at the SA4 level for each jurisdiction.[11] It also combines this data with what is reported by the NDIA (in-kind and/or enrolled) for each SA4 region and therefore, provides a comprehensive summary of SDA supply in Australia. In-kind SDA dwellings are properties that are owned by a state government and tenanted by NDIS participants in that state. The NDIA data from the latest quarter (i.e., 30 June 2021) shows that there are in-kind properties only in Tasmania. Since the last survey, Victoria's in-kind dwellings have been enrolled and are now shown in that data from the NDIA. In this survey, SDA pipeline dwellings were reported in a total of 73 SA4 regions.

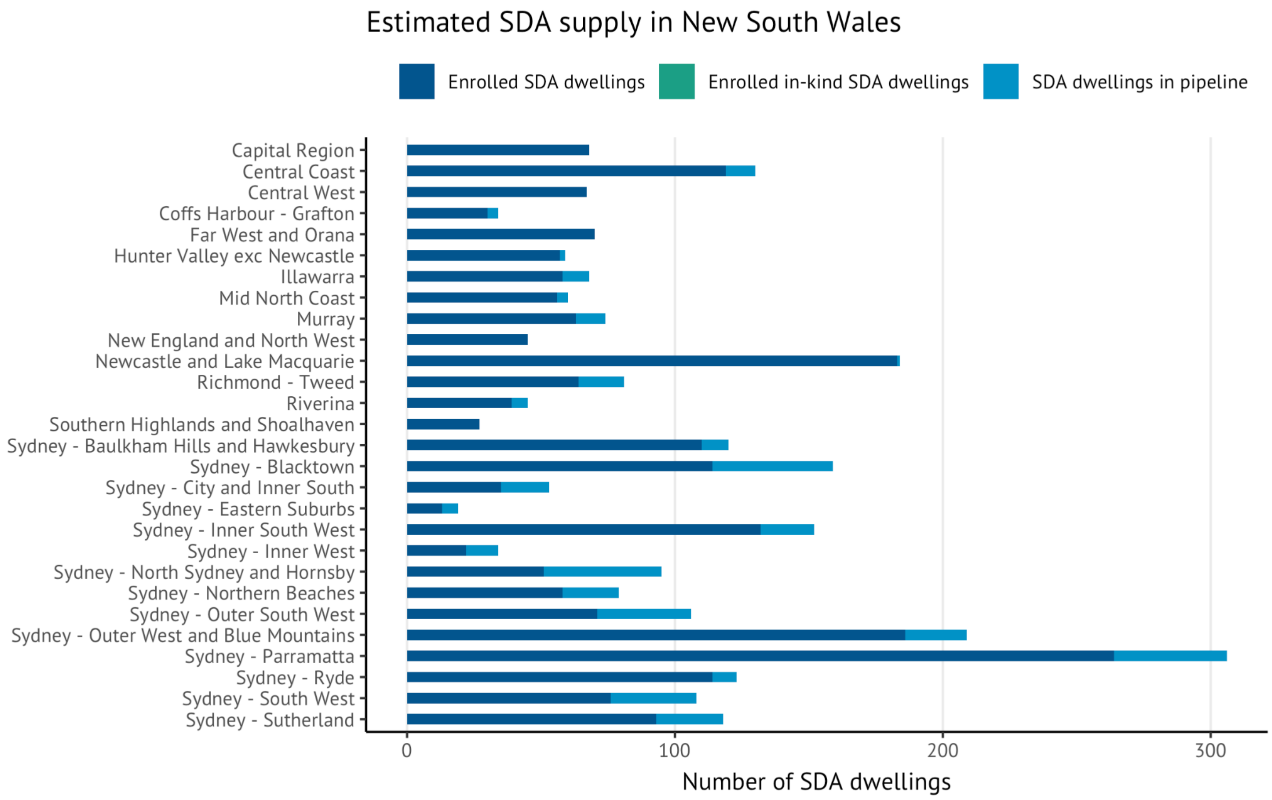
New South Wales

Table 22 - Estimated number of SDA dwellings and places for each SA4 region in the pipeline in New South Wales (NSW)

NSW SA4 region	Number of dwellings	Number of places
Capital Region	0	0
Central Coast	11	19
Central West	0	0
Coffs Harbour - Grafton	4	8
Far West and Orana	0	0
Hunter Valley exc Newcastle	2	4
Illawarra	10	10
Mid North Coast	4	11
Murray	11	20
New England and North West	0	0
Newcastle and Lake Macquarie	1	3
Richmond - Tweed	17	30
Riverina	6	8
Southern Highlands and Shoalhaven	0	0
Sydney - Baulkham Hills and Hawkesbury	10	10
Sydney - Blacktown	45	52
Sydney - City and Inner South	18	24
Sydney - Eastern Suburbs	6	10
Sydney - Inner South West	20	20
Sydney - Inner West	12	20
Sydney - North Sydney and Hornsby	44	52
Sydney - Northern Beaches	21	25
Sydney - Outer South West	35	48
Sydney - Outer West and Blue Mountains	23	63
Sydney - Parramatta	42	63
Sydney - Ryde	9	12
Sydney - South West	32	42
Sydney - Sutherland	25	31
TOTAL	**408**	**585**

[11] See Australian Bureau of Statistics (ABS, 2016) for more information on Statistical Area Level 4 (SA4).

Figure 46 - Estimated SDA supply in New South Wales

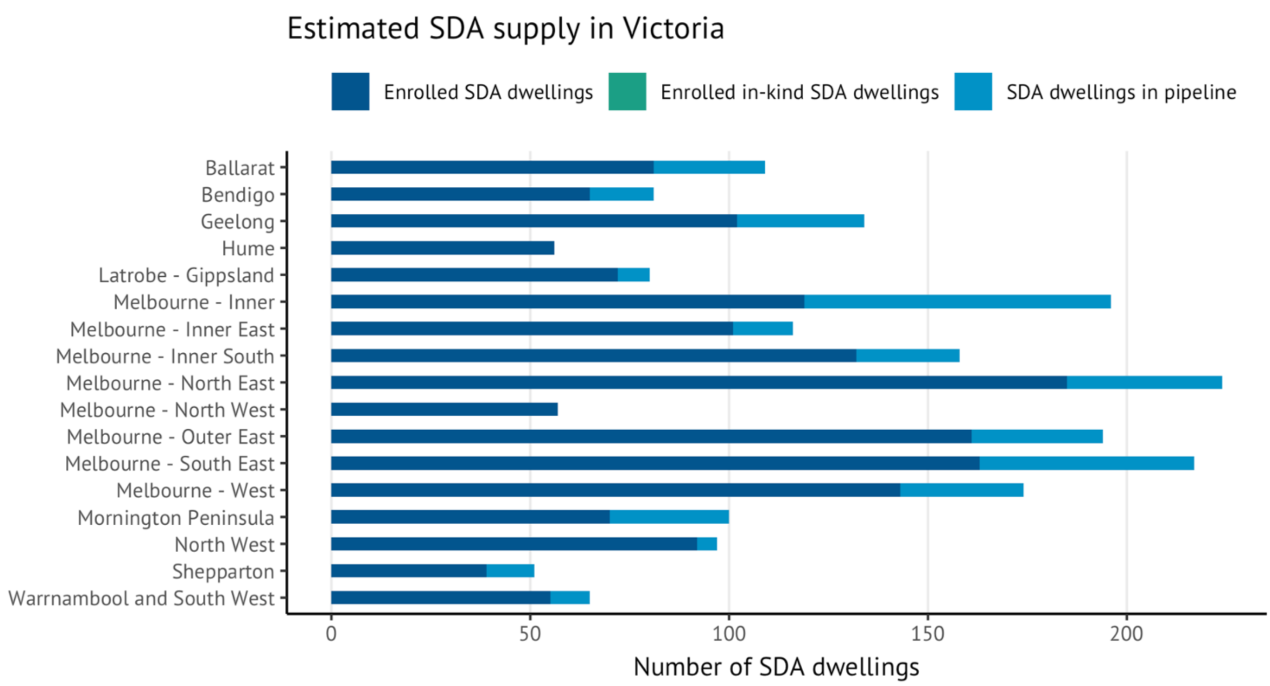


Victoria

Table 23 - Estimated number of SDA dwellings and places for each SA4 region in the pipeline in Victoria (VIC)

VIC SA4 region	Number of dwellings	Number of places
Ballarat	28	36
Bendigo	16	19
Geelong	32	43
Hume	0	0
Latrobe - Gippsland	8	15
Melbourne - Inner	77	77
Melbourne - Inner East	15	16
Melbourne - Inner South	26	29
Melbourne - North East	39	71
Melbourne - North West	0	0
Melbourne - Outer East	33	45
Melbourne - South East	54	74
Melbourne - West	31	46
Mornington Peninsula	30	41
North West	5	7
Shepparton	12	18
Warrnambool and South West	10	22
TOTAL	**416**	**559**

Figure 47 - Estimated SDA supply in Victoria

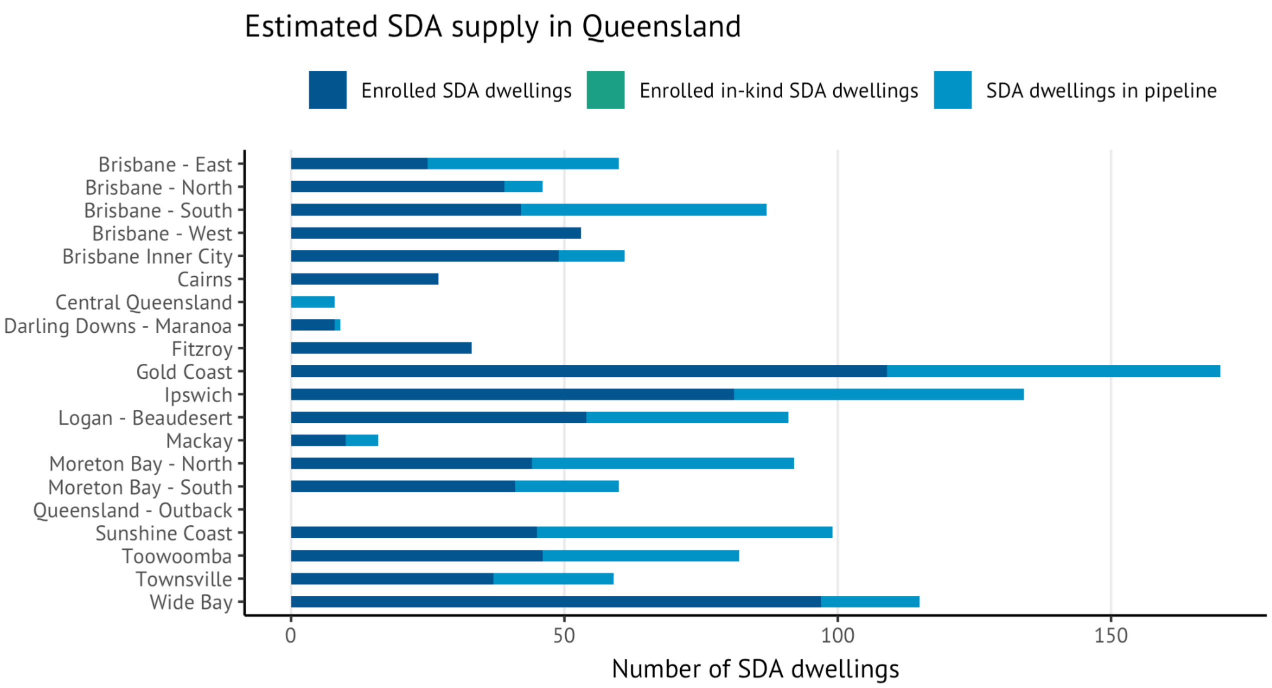


Queensland

Table 24 - Estimated number of SDA dwellings and places for each SA4 region in the pipeline in Queensland (QLD)

QLD SA4 region	Number of dwellings	Number of places
Brisbane - East	35	43
Brisbane - North	7	13
Brisbane - South	45	58
Brisbane - West	0	0
Brisbane Inner City	12	12
Cairns	0	0
Darling Downs - Maranoa	1	2
Fitzroy	0	0
Gold Coast	61	84
Ipswich	53	79
Logan - Beaudesert	37	63
Mackay	6	14
Moreton Bay - North	48	72
Moreton Bay - South	19	27
Queensland - Outback	0	0
Sunshine Coast	54	87
Toowoomba	36	48
Townsville	22	31
Wide Bay	18	36
Central Queensland	8	12
TOTAL	**462**	**681**

Figure 48 - Estimated SDA supply in Queensland



Western Australia

Table 25 - Estimated number of SDA dwellings and places for each SA4 region in the pipeline in Western Australia (WA)

WA SA4 region	Number of dwellings	Number of places
Bunbury	35	40
Mandurah	11	12
Perth - Inner	26	29
Perth - North East	17	30
Perth - North West	50	82
Perth - South East	37	72
Perth - South West	56	89
Western Australia - Outback	10	21
Western Australia - Wheat Belt	6	9
TOTAL	**248**	**384**

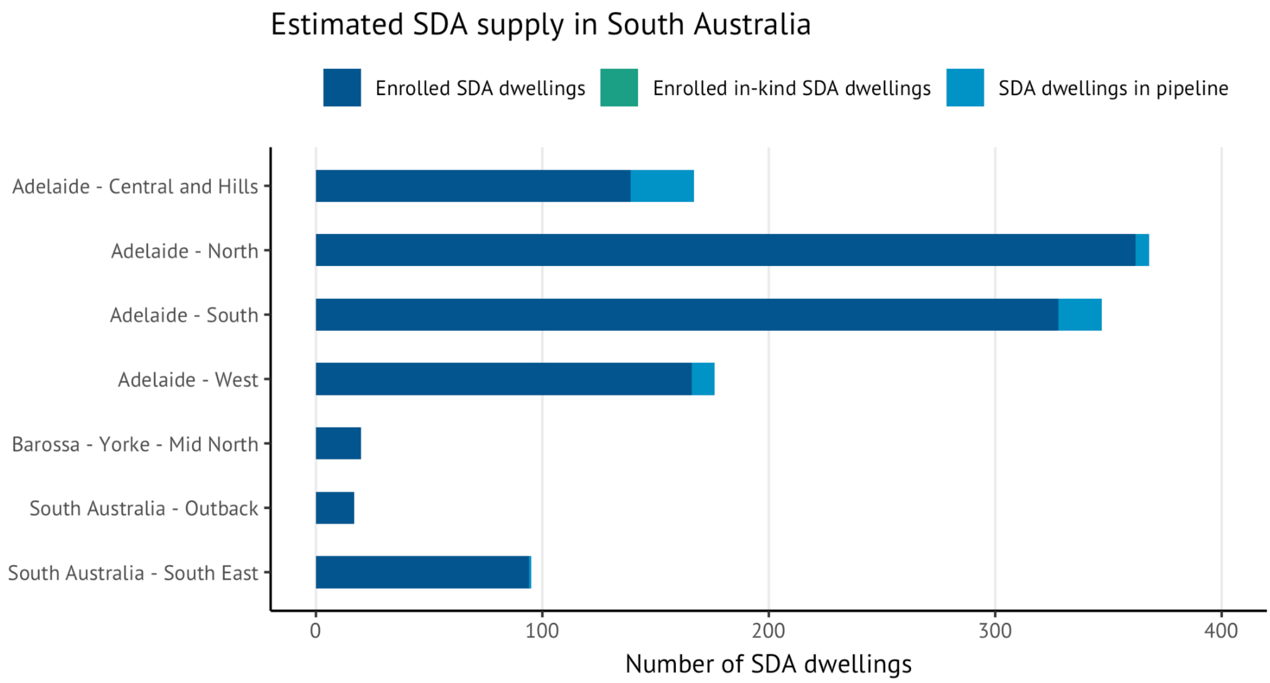
Figure 49 - Estimated SDA supply in Western Australia

South Australia

Table 26 - Estimated number of SDA dwellings and places for each SA4 region in the pipeline in South Australia (SA)

SA SA4 region	Number of dwellings	Number of places
Adelaide - Central and Hills	28	28
Adelaide - North	6	6
Adelaide - South	19	22
Adelaide - West	10	10
Barossa - Yorke - Mid North	0	0
South Australia - Outback	0	0
South Australia - South East	1	2
TOTAL	**64**	**68**

Figure 50 - Estimated SDA supply in South Australia

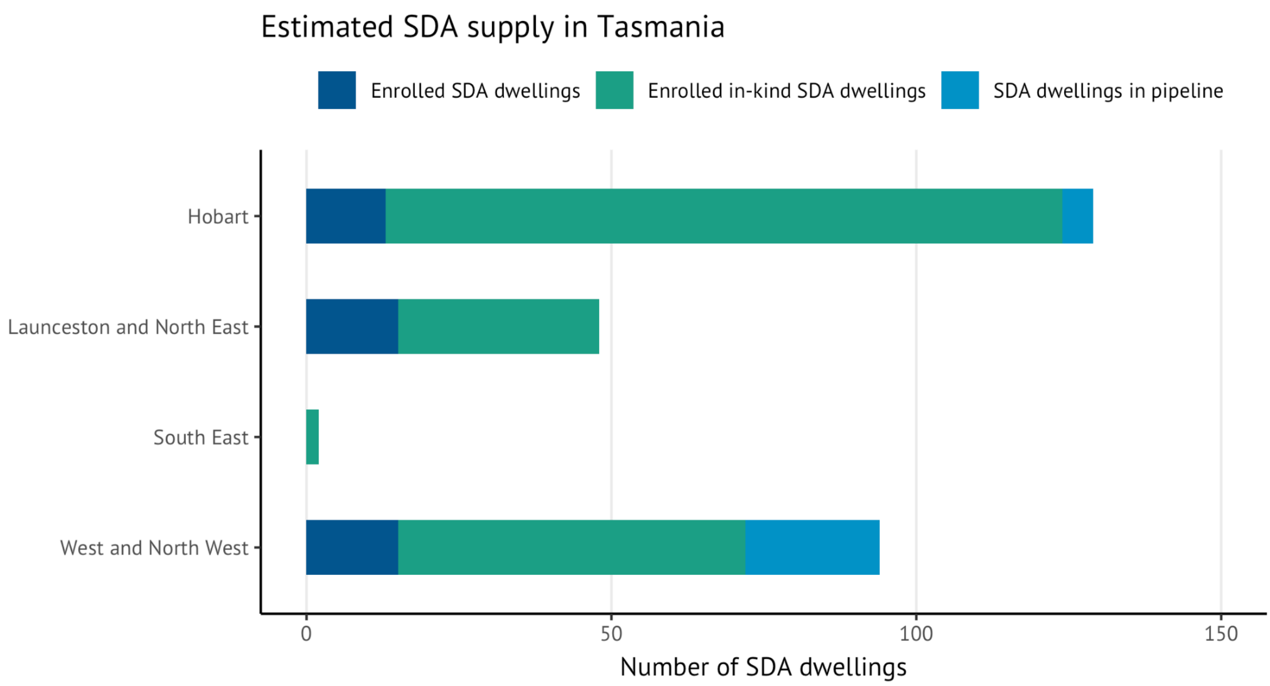


Tasmania

Table 27 - Estimated number of SDA dwellings and places for each SA4 region in the pipeline in Tasmania (TAS)

TAS SA4 region	Number of dwellings	Number of places
Hobart	5	5
Launceston and North East	0	0
South East	0	0
West and North West	22	42
TOTAL	**27**	**47**

Figure 51 - Estimated SDA supply in Tasmania

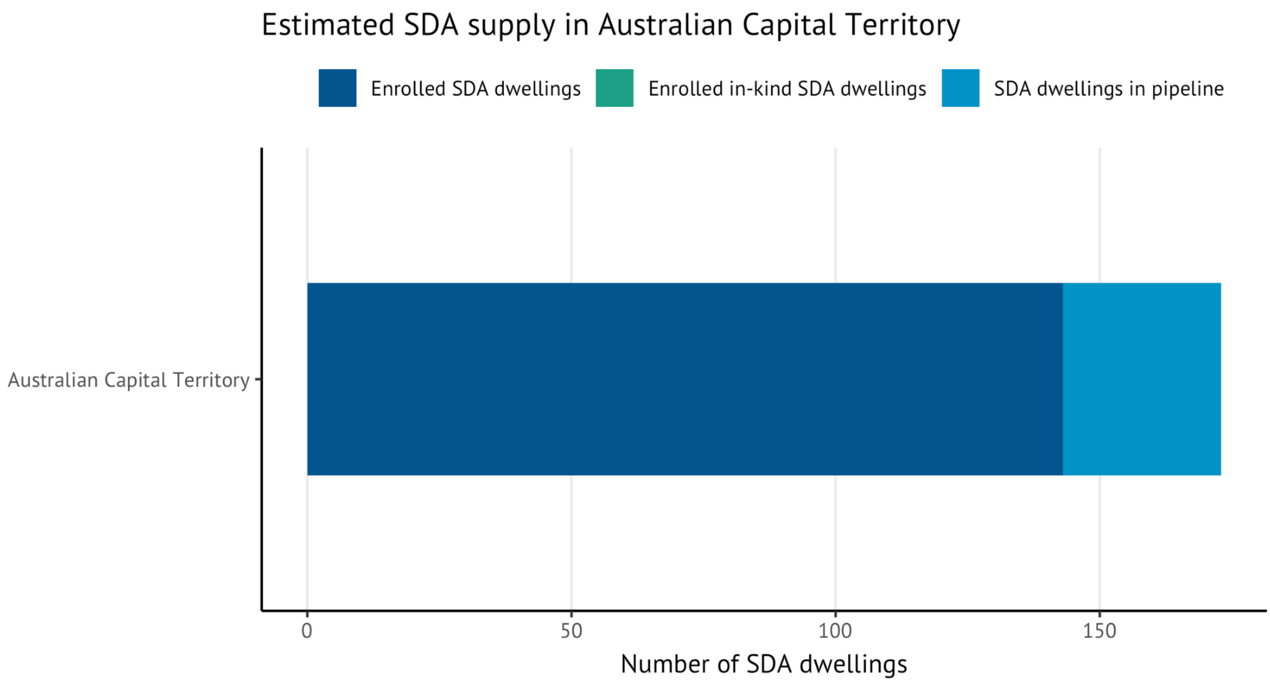


Australian Capital Territory

Table 28 - Estimated number of SDA dwellings and places for each SA4 region in the pipeline in Australian Capital Territory (ACT)

ACT SA4 region	Number of dwellings	Number of places
Australian Capital Territory	30	30
TOTAL	**30**	**30**

Figure 52 - Estimated SDA supply in Australian Capital Territory



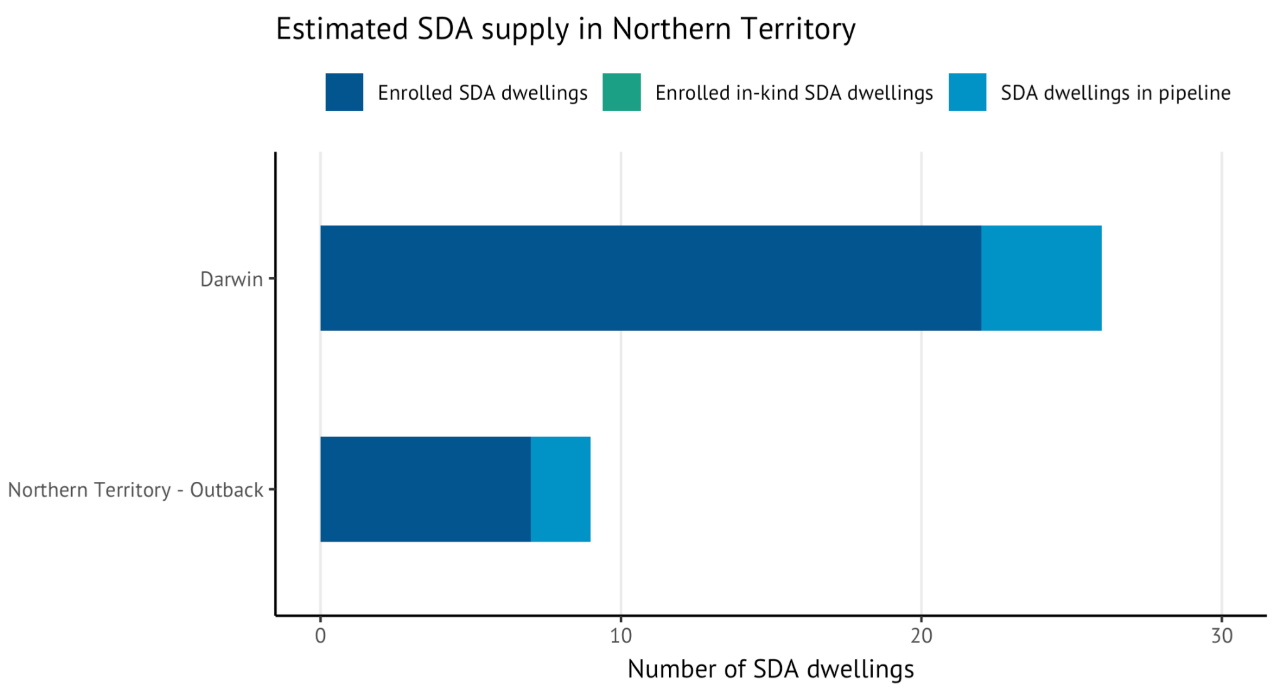
Northern Territory

Table 29 - Estimated number of SDA dwellings and places for each SA4 region in the pipeline in Northern Territory (NT)

NT SA4 region	Number of dwellings	Number of places
Darwin	4	12
Northern Territory - Outback	2	0
TOTAL	**6**	**12**

Note: The number of SDA places for the 2 dwellings in the pipeline in Northern Territory - Outback are unknown

Figure 53 - Estimated SDA supply in Northern Territory



Future plans for SDA dwellings beyond the current pipeline

A total of 62 providers responded to this section of the survey, which asked providers about future plans to develop SDA dwellings beyond their current pipeline.

Plans to build more SDA dwellings beyond current pipeline

Of the 62 providers, almost two thirds (62.9%) reported that they were planning to build more SDA dwellings beyond their current pipeline, while 24.2% of providers were unsure.

Reasons for being unsure about plans for future dwellings

Providers who were unsure about whether they would build more SDA dwellings in the future raised concerns regarding SDA funding determinations for potential tenants (*n* = 4), particularly for apartments. Frequent policy changes and an uncertainty around whether potential tenants would be approved for SDA funding were reported to make it challenging to plan future SDA dwellings.

"The uncertainty surrounding participant approvals is making it extremely difficult to plan with any certainty." - SDA provider

Uncertainties regarding current and future activated demand (n = 4) were also raised as a reason for being unsure about plans for future dwellings. Providers indicated that there is currently an insufficient number of NDIS participants with SDA in their plan to match SDA supply, and that future demand is difficult to predict. Some of the feedback suggests that SDA providers are turning to other forms of disability housing. This is concerning as non-SDA housing (such as closed systems SIL homes[12]) can lack regulation and tenancy rights as well as not providing tenants with choice over support provided.

"We are finding that SDA supply is exceeding the demand and building disability class 3 homes is a safer bet than SDA." - SDA provider

Lastly, providers reported being unsure about their future plans for building SDA dwellings because of funding and investment issues (*n* = 4). Plans for future dwellings were reported to depend on the willingness of investors and banks to provide funding despite current concerns about financial returns.

"The major banks have increased concern on the vacancy risk." - SDA provider

[12] The term 'closed setting' or 'closed system SIL home' is used by the NDIA in the June 2021 Home and Living Consultation Paper

Conclusion

This report provides valuable information to inform people with disability, market players and the NDIA on the current and future supply of SDA in Australia. Given that over 14,000 people who are likely to be eligible for SDA funding are not yet receiving payments, the demand for SDA should be strong. This demand is greater still, when the number of old or existing housing stock needing to be replaced is considered.

However, challenges reported by SDA providers shows that while demand should be outstriping supply, actual demand, being the number of NDIS participants with SDA funding in their plans, is falling short[13]. Urgent action is required to activate demand by identifying the remaining 14,000 people who are likely to be eligible for SDA funding. In addition, NDIA system issues with regards to approvals of SDA funding so that new SDA places can be taken up by NDIS participants as they are enrolled, also needs to be addressed.

As the fourth edition of the SDA Supply Survey, this report deepens collective understanding of the market and offers insights on emerging supply trends. Consistent with the results of previous surveys, this report has shown a more even spread of development activity across Australia than in previous years. While apartments are the dominant building type being developed, the proportion of villas/duplexes/townhouses and houses being developed has increased. Just over half of all SDA places being developed are in dwellings for a maximum of 1 resident, indicating that the SDA market continues to move towards more individualised housing options and away from larger settings, such as group homes. The number of places in SDA with the High Physical Support design category has increased significantly compared with previous surveys. However, it is noted that many providers are building dwellings to the High Physical Support design category and tenanting these dwellings with people with Fully Accessible SDA funding. The number of places in Robust SDA has also risen. Given the persistent undersupply of Robust SDA to date, this latter finding is particularly welcome. The survey also revealed a slight increase in the number of places in Fully Accessible SDA and a slight decrease in the number of places in Improved Liveability SDA in comparison to previous years.

[13] As at 30 June 2021, the NDIA data shows that there are 16,033 people with SDA funding in their NDIS Plans compared to over 18,617 places in enrolled SDA dwellings, NDIA (2021)

When asked to rate their confidence in the SDA market, approximately 30% of SDA providers indicated they were slightly confident, while only 13% were very confident. Providers who reported being confident noted the ongoing strong demand for SDA, improved quality of dwellings, and improvements to some NDIA processes, leading to more reliable and stable models. However, providers also remarked on challenges such as a lack of transparency on SDA determinations and eligibility, and supply and demand imbalances for SDA types and design categories in some locations. Together, these themes suggest that many providers are optimistic about the SDA market as a whole, but also clear-eyed about ongoing issues which may impact their ability to provide SDA. The experiences of SDA providers, along with the supply data, represent an opportunity for greater market stewardship from the NDIA. They may also help catalyse further collaboration and consultation with all stakeholders, including housing and support providers, to help improve the housing and lives of people with disability.

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Appendix A: Data screening for SDA supply pipeline

A total of 48 providers completed the SDA supply pipeline section of the current survey, together reporting a total of 1503 dwellings. As per the previous survey, completed dwellings which had already been enrolled with the NDIS were excluded from the analysis and thus not included in the current report. This is to avoid duplication with what is already published by the NDIS. All other dwellings reported for each of the following stages of development were included:

- Construction completed, pending enrolment with the NDIA
- Under construction
- Development stalled
- Development and building approval completed and contractually committed to build
- Land secured, waiting for building approval and/or finance approval

Based on these 1503 dwellings, the total number of SDA places reported in the current pipeline was 2,128. However, it is important to note that this figure does not include the pipeline data of providers who did not participate.

When combining the pipeline data from the previous SDA supply report, the number of dwellings and respective places increased. Specifically, dwellings that had an estimated occupancy date of August 2021 or beyond (as reported by providers in the previous survey) were included in the current estimate[14]. Importantly, this only occurred if dwellings were not also reported in the current survey. This resulted in an additional 158 dwellings and 238 places being added from a total of 11 providers, all of which did not provide any pipeline data in the survey this year. Therefore, the pipeline data presented in the current report is based on the responses of 59 SDA providers. The combined pipeline total revealed that there are 1,661 dwellings in development, creating a total of 2,366 SDA places. This is equivalent to an average of 1.4 SDA residents per dwelling.

For accuracy, the statistical geography of each dwelling in the SDA pipeline was verified and/or determined using ABS maps (ABS, 2020) to identify the 2021 Statistical Area Level 4 (SA4) and the 2020 Local Government Areas (LGA). This was done based on the address provided by the survey respondents for each dwelling. If only part of the address was available, such as the suburb and/or postcode, the statistical geography was based on the central point of that region.

[14] This date is an estimated occupancy date only and should be interpreted with caution.

Appendix B: List of contributors who provided consent for publication

The Housing Hub and Summer Foundation sincerely thank all providers who participated in the survey.

1. AAASDA
2. Ability Housing
3. Ability SDA
4. Able Australia Services
5. Access2Place Housing
6. Accessible Accommodation Specialists
7. Accessible Homes Australia
8. ADAPT Housing Pty Ltd
9. Adaptive Housing
10. AEON Disability Support Services
11. ALH Engineering Services
12. Allevia
13. Anand group homes
14. Anita R Geach SDT/SDA
15. ARD Housing Group Pty Ltd
16. Believe Care Services
17. BlueCHP Limited
18. BNA Projects
19. Carpentaria
20. Carra Property
21. Casa Capace
22. Central Coast Living Options Ltd
23. Cerebral Palsy Foundation
24. Churches Of Christ Housing Services Ltd
25. Colac Otway Disability Accommodation Inc
26. Community Housing Limited
27. Cooinda Terang Inc
28. Cornerstone Housing Ltd
29. Disability Housing Solutions Pty Ltd
30. EACH Housing
31. Edenbridge Property
32. Empowered Liveability
33. Enliven Housing
34. Glenray Industries
35. Good Housing
36. GR8 Corporation
37. Grayllen Co. Pty Ltd
38. Guardian Living Australia
39. Halcyon Homes
40. Healing Hands Complete Care
41. Homes Victoria
42. HORIZON sda care
43. Housing Choices Australia
44. Hume Community Housing
45. Illowra Projects Pty Ltd
46. Independent Living Villages Ltd
47. InHab Australia
48. Kennett Ridge Pty. Ltd.
49. Life Without Barriers
50. Mercy Connect
51. MS Queensland
52. Multitask
53. NDISP
54. Nhaka Asset Management
55. Perth Design & Construct
56. Project Friday
57. Property Friends
58. Purposed Housing Australia
59. SACARE
60. Sana Living
61. SDA Housing Australia
62. SDA Management Australia
63. SDA Options
64. SDAccom Pty Ltd
65. Shift
66. Southern Stay Disability Services Inc
67. Specialised Accommodation Providers
68. St John of God Accord
69. Summer Housing
70. Sunnyfield
71. Sylvanvale Foundation
72. The Cram Foundation
73. The Housing Connection
74. Secure Housing
75. Vera Living
76. West End Support Services
77. Youngcare Ltd
78. Yumba-Meta Limited

Appendix C: Other resources used to understand needs and preferences

Approximately half of providers indicated using “other” resources to understand the needs and preferences of people with disability. These included:

- Consulting with potential SDA tenants and their families or decision-makers
- Consulting with other stakeholders, including:
    - other SDA providers,
    - SIL providers,
    - qualified SDA certifiers,
    - architects and consultants,
    - peak body organisations
- Consulting with SDA participants’ care team, such as support coordinators and allied health professionals
- Relying on their personal experience with the sector
- Using established networks, such as past colleagues and feedback from existing tenants
- Referring to research, data, and reports conducted by themselves and other organisations

Appendix D: Questions for people with disability

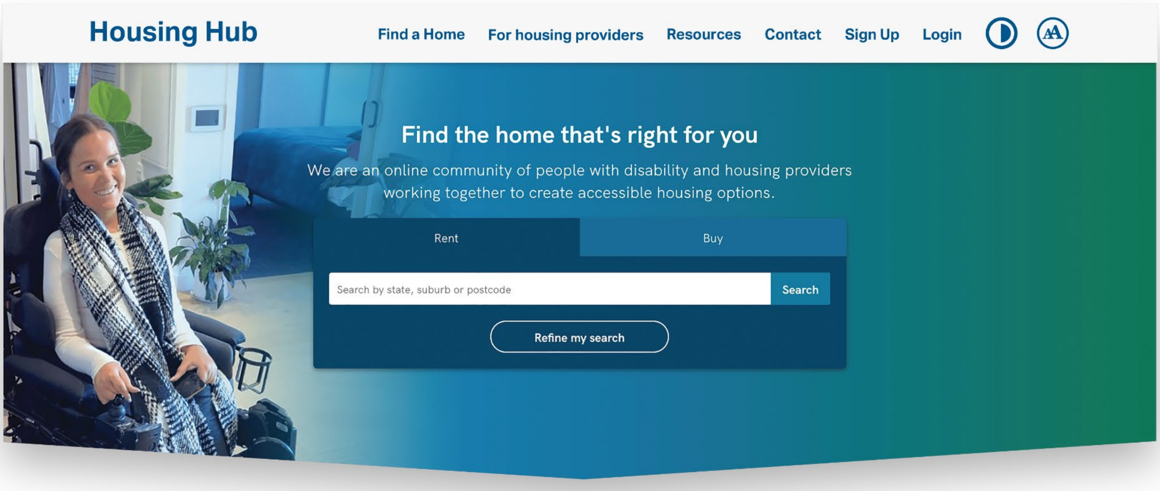
The following is a list of the questions that providers reported they would like to ask people with disability:

- How can we help you?
- What do you require to obtain an SDA property?
- When building group based SDA properties, what is the maximum acceptable number of rooms? (how many people will they be comfortable sharing supports with?)
- Location of SDA properties. Do they want to be close to particular amenities or are they looking for a quiet place further away from amenities?
- The design of an SDA is specific for a customer. [We] take time in speaking and understanding the customer, ensuring the development is designed and constructed to meet their housing goals.
- How can I meet you earlier to meet your specific needs in an SDA?
- How would you balance the ability to access shared supports (where you wish to optimise your support funding) with independence and privacy in your physical home environment?
- Mainly preference of location and community.
- There are some macro questions relating to demand that would help to support SDA development decisions; this would include questions like (a) where do people want to live, (b) who/how many others do they want to live with, and (c) how can we make people living in legacy/existing stock more aware of the options available to them. At a micro level, the various questions contained in the My Housing Preferences tool (Summer Foundation) could provide fantastic detail to support an organisation's understanding of participants' needs and preferences.
- Locations of where they would like SDA properties to be built.
- There is a missing link between SDA provider and SIL and cares. We all need to set up a network with participants and ask what participants want.
- Name their top 5 must haves would be handy at different levels. Someone who has HPS [High Physical Support] needs will have a different top 5 to a person with robust needs.
- How to best support individuals to find suitable house mates when approved to share but wanting to live alone.
- Do you feel that you are misled by the NDIA with relation to choice and control? Specifically that you are unable to live independently by choice unless you are told you are able to live alone. Clients should only be assessed as to the level of SDA accommodation based on physical need and not directed or only approved for shared accommodation etc. Sharing or not sharing is a choice for the participant, not the NDIA. Hence do you feel misled or discriminated against when considering choice and control?
- What is important in how you would like to live?

Appendix E: About the Housing Hub

The Housing Hub is an online community of people with disability and housing providers working together to create accessible housing options.

The Housing Hub website – www.housinghub.org.au – lists properties for rent or sale that may be suitable for people with disability. With well over 1,800 properties currently listed, the Housing Hub features all design categories of Specialist Disability Accommodation (SDA), as well as many other types of accessible housing. To understand more about the listings on the Housing Hub, review the Listing Snapshot Report.



Housing seekers can search through the listings, or create a housing seeker profile by answering a few questions about where they want to live, what type of home they're looking for, what features are required and who they would like to live with. The Housing Hub will then show the seeker listed properties that are a good match for their profile. Each listing includes a 'Suitability Score', which tells the seeker just how good a match the property is to their preferences. When creating a profile, housing seekers can also elect to be automatically notified when a property is listed that is a good match for their profile. For more information on how housing seekers are using the Housing Hub, check out the Housing Seeker Snapshot report.

Generalised data resulting from housing seeker profiles on the Housing Hub provides insights into the demand for accessible housing across Australia. With over 12,000 new users and over 90,000 pageviews every month – and over 1,200 enquiries generated to property owners per month (and growing) – the insights generated are significant. Sharing the data gleaned from these interactions with the housing market enables the needs and preferences of people with disability to shape future development.

The Housing Hub team began providing tenant matching services in 2018. To date, the team has supported over 550 people to access SDA funding and move into a new SDA home.

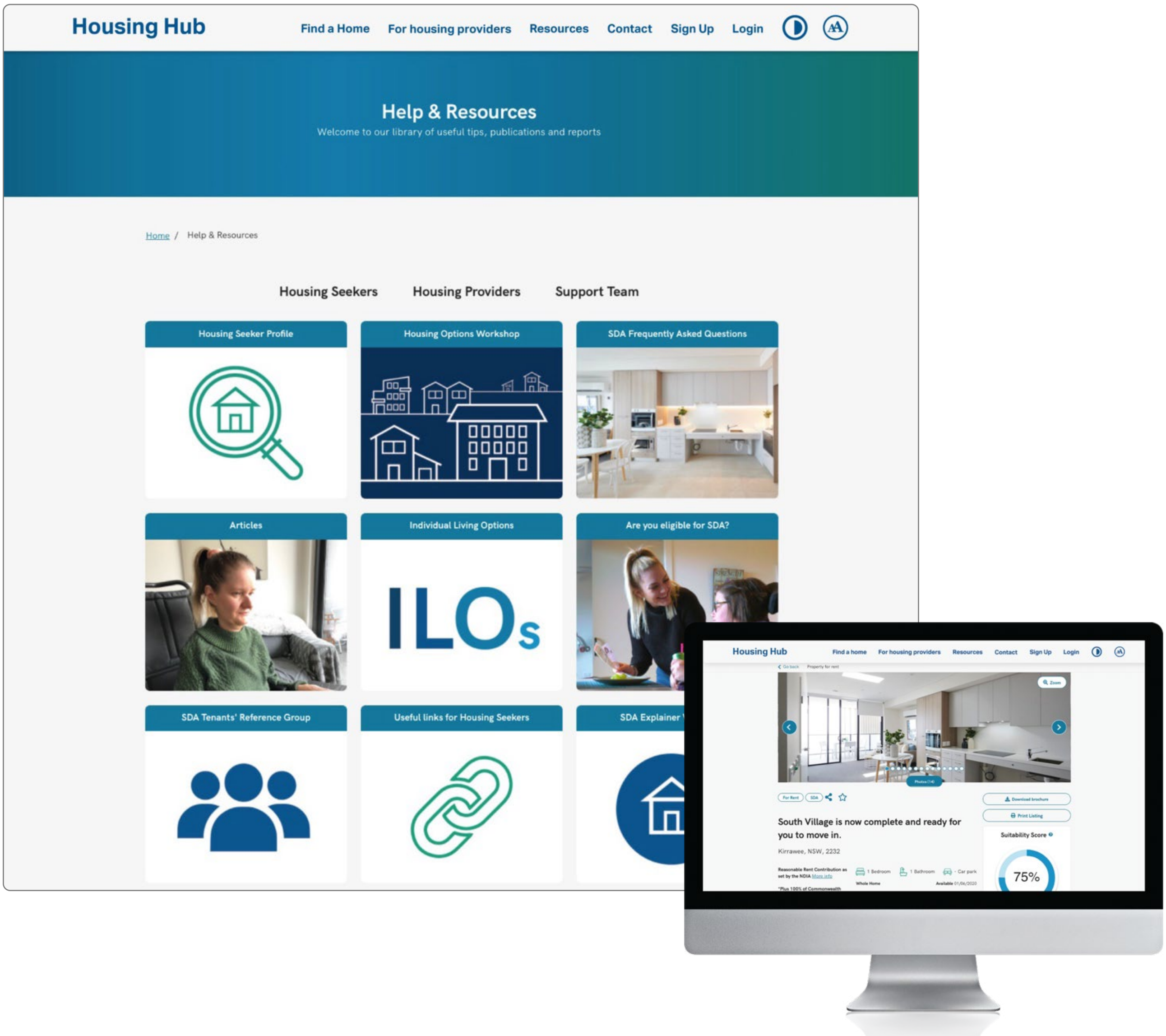
Resources

The Housing Hub website contains libraries of resources for housing seekers, supporters and housing providers – including videos, guides and templates. To explore, go to: www.housinghub.org.au/resources

Services for housing seekers

The Housing Hub team provides a range of services to support housing seekers. Via workshops, resources and the SDA Housing Advice Line (1300 61 64 63), we support people with disability to:

- Understand the range of housing options that may be available to them
- Find out more about Specialist Disability Accommodation (SDA)
- Think about where they may want to live, what type of home they want to live in and who they want to live with
- Find out from the NDIS if they are eligible for SDA funding



Services for housing providers and vendors

The Housing Hub website is an effective way for providers and vendors of accessible housing to connect with suitable tenants. Providers can manage listings for their properties without needing to engage a third party, and prospective tenants can communicate with providers directly.

Changes to the Housing Hub's interface have dramatically improved the experience for housing providers and vendors, reducing the time it takes to list properties and simplifying the process – particularly for organisations with multiple properties to list.

It is free to use the Housing Hub to create property listings and receive enquiries from prospective tenants.

Premium services

The Housing Hub offers a tenant matching service for SDA providers on a fee-for- service basis. Our team identifies prospective tenants who may be a good fit for the SDA design category and features of the property, then supports prospective tenants to secure SDA funding and, if they wish to, apply for a vacancy at the property.

Generalised data resulting from housing seeker profiles on the Housing Hub can build a nuanced understanding of the demand for accessible housing. With insights into what types of housing (and housing features) are desired in what locations, providers can build to address demand with greater certainty. The Housing Hub regularly releases data insights to the market; while more detailed analyses are available for a fee. Contact support@housinghub.org.au for more information.

For a fee, providers and vendors can promote a listing as a 'Featured Property'. Featured properties appear on the homepage of the Housing Hub website, and are promoted to housing seekers via the Housing Hub's social media channels and via email to our subscriber list of more than 6,000 housing seekers.

The Housing Hub has recently introduced banner advertising for providers to promote their brand and listings on the Housing ub to a wider range of active housing seekers. A banner ad including the providers logo and a link to the providers full list of listings can be placed for a month at a time. For more information on the Housing Hub's services for housing providers and vendors, email: support@housinghub.org.au

Appendix F: Summer Foundation's role in the SDA Market

The following content aims to provide clarity on any perceived conflicts of interest between the Housing Hub team, Summer Foundation policy and research projects, and Summer Housing.

Summer Foundation

The Summer Foundation is a not for profit, established in 2006, committed to resolving the issue of young people living in aged care. Summer Foundation commissioned two housing demonstration projects for younger people with disability living in, or at risk of admission to, nursing homes.

Beginning with two apartments in Abbotsford, Victoria in 2013, the Summer Foundation replicated this success with 10 more apartments in the Hunter region of NSW which launched in 2016. The co-located apartment model was developed to enable people with high support needs (including Young People in Residential Aged Care and younger people at risk of entering Residential Aged Care) to be able to live in their own apartment but be co-located to enable the cost-effective provision of support.

The Summer Foundation is not an SDA provider or a registered NDIS provider. Summer Foundation's Tenancy Matching Service works with six SDA providers at present to identify potential tenants for new SDA projects in the pipeline. Those providers are Summer Housing, Enliven Housing, Guardian Living, The Independent Living Company, SDA Aust Pty Ltd and Insitu Housing. So far the Summer Foundation has supported over 569 NDIS participants to receive a housing offer in new SDA, including 94 younger people in RAC. The Tenancy Matching Service is a social enterprise that operates on a cost recovery basis.

There are over 15 different disability organisations providing shared support to tenants living in SDA apartments across Australia. The Summer Foundation does not own any SDA funded apartments. The Summer Foundation is not an NDIS provider and does not have any influence on the selection of disability support providers in SDA funded apartments.

The Summer Foundation's position is that we want to see a whole range of dwelling types and housing options so that NDIS participants have a real choice. We do not have a vested interest in a particular dwelling type and promote the benefits of a diverse market with flexible support arrangements, tailored to the needs of individuals.

The Summer Foundation developed and operates the Housing Hub which is an online platform that supports housing seekers and housing providers to connect. The Housing Hub is free for both housing seekers and housing providers. Housing providers pay for premium listings and bespoke data reports. The Housing Hub has over 1,240 housing providers as customers listing both SDA and non-SDA properties.