

An aerial photograph of a city skyline, featuring a prominent skyscraper with a curved top and a beach area in the foreground. The sky is clear and blue.

Specialist Disability Accommodation Provider Experience Survey

August 2023



SUMMER
FOUNDATION

Housing Hub

Find the home that's right for you

Specialist Disability Accommodation

Provider Experience Survey

Third Provider Experience Survey – August 2023
Second Provider Experience Survey - June 2022
First Provider Experience Survey – September 2021

Housing Hub

hello@housinghub.org.au

www.housinghub.org.au

The Housing Hub is an initiative of the Summer Foundation.

Summer Foundation Ltd

ABN 90 117 719 516

PO Box 208

Blackburn 3180

VIC Australia

Telephone: +613 9894 7006

Fax: +613 8456 6325

info@summerfoundation.org.au

www.summerfoundation.org.au



© 2023 by the Housing Hub and Summer Foundation Ltd. A copy of this report is made available under a Creative Commons Attribution 4.0 Licence (international). Please note that photographs used to illustrate this report remain the property of their respective copyright owners and are not shared as part of this Creative Commons Licence.

CITATION GUIDE

Tuohy, L., Wellecke, C., Aimers, N., Winkler, D., Rathbone, A., Robertson, J., & Rothman, R. (2023). *Specialist Disability Accommodation provider experience survey: July 2023*. Housing Hub and Summer Foundation. <https://www.housinghub.org.au/resources/article/sda-provider-experience-survey-2023>

ACKNOWLEDGEMENTS

We would like to thank the many people who contributed to this report for their time and valuable insights, including the SDA providers who completed the survey.

DISCLAIMERS

The Housing Hub and the Summer Foundation have prepared this report in good faith based on information available to us at the date of publication. Information has been obtained from sources that we believe to be reliable and up to date, but we have not verified its accuracy or completeness. The Housing Hub and the Summer Foundation do not make any warranty, express or implied, regarding any information in the report, including warranties as to the accuracy, completeness, or fitness for purpose of the information. The Housing Hub and the Summer Foundation are not liable to any person for any damage or loss that has occurred, or may occur, in relation to that person taking or not taking action in respect of any representation, statement, opinion or advice referred to in this report.

Contents

Contents	1
Acronyms	3
Executive Summary	1
Key findings	1
Recommendations	2
Introduction	4
Method	8
Recruitment	8
Survey design	8
Analyses	8
Results	10
Sample	10
Description of the sample	10
Enrolled New Build SDA dwellings and places	10
Organisation type	10
Location	11
Building type	12
Design category	13
Committed capital to New Build SDA	14
Financing of New Build SDA	14
Vacancies and lease times in New Build SDA	15
Vacancy rates for New Build SDA over time	15
Vacancy rates for New Build SDA by building type and design category	15
Time taken to lease New Build SDA properties	18
Support providers	20
Challenges with finding tenants, filling vacancies, and after tenants have moved in	20
Challenges related to finding tenants	20
Challenges related to filling New Build SDA vacancies	22
Challenges once tenants have moved in	24
Other challenges	26
Financial risks	33
SDA income	33
Overdue payments from the NDIA	34
Changes in overdue payments by the NDIA between 2021, 2022 and 2023	35
Reasons for overdue payments	38
Suggestions from providers on how to improve NDIA systems to ensure timely and accurate SDA payments	40
Changes to the SDA market	43
Current strengths of the SDA market	46
Discussion	50
Challenges with filling vacancies	50

Challenges after filling vacancies	51
Strengths of the market and the way forward	52
Recommendations	53
Appendix A: SDA design categories and building types of New Build SDA	54
Appendix B: About the Housing Hub	55
Services for housing providers and vendors	56
Premium services	56
Understanding the SDA Market	56
Market data subscription	56
Market data report for a Local Government Area	57
SDA Supply - Premium Addendum	57
Attracting tenants	57
Featured property listing	57
Advertising	57
Housing Hub listing service	58
Listing performance dashboard	58
Supporting prospective tenants to secure SDA and support funding	58
Appendix C: The Summer Foundation's role in the SDA Market	59
Summer Foundation	59

Acronyms

AT	Assistive Technology
SDA	Specialist Disability Accommodation
SIL	Supported Independent Living
NDIA	National Disability Insurance Agency
NDIS	National Disability Insurance Scheme
OSS	On-site Shared Support

Executive Summary

The National Disability Insurance Scheme (NDIS) provides housing payments to people with extreme functional impairment and/or very high support needs. These housing payments, as well as the bricks-and-mortar dwelling, are called Specialist Disability Accommodation (SDA). SDA is designed to be more accessible for eligible participants to enhance their independence and allow other supports to be delivered better or more safely.¹

The SDA market has the potential to change the lives of people with disability. However, anecdotal evidence provided to the Housing Hub in 2021 suggested that many SDA providers were under significant financial pressure due to uncertainties in the market as well as challenges in dealing with the National Disability Insurance Agency (NDIA). In response to these reports, the Housing Hub and Summer Foundation began conducting annual *SDA Provider Experience Surveys* in 2021, exploring a range of barriers and challenges faced by SDA providers operating in the SDA market.²

The *SDA Provider Experience Surveys* in 2021 and 2022 revealed that high vacancy rates and delayed remittance of SDA payments were the main contributing factors to providers being under significant financial pressure. The identified vacancy rates were considerably higher than the rates assumed in the NDIA's pricing models. Further, some providers reported they were owed millions of dollars in SDA payments from the NDIA, some for more than 90 days.³ These vacancy and payment issues create financial challenges and uncertainties for providers, which have a detrimental impact on their operations and the overall stability of the SDA market. Ongoing monitoring of the challenges in the SDA market is crucial in order to expand the evidence base on the experiences of providers and address entrenched issues.

To contribute to this effort, the Housing Hub and Summer Foundation conducted the third *SDA Provider Experience Survey* in 2023. The aims of this survey were to expand the evidence base on the experiences of SDA providers and to quantify the commercial risks they face. In total, 41 providers completed the survey and reflected on their experiences of providing SDA. Between them, these providers were offering 1,452 places for tenants in their 779 New Build SDA dwellings, representing almost one-quarter of all New Build SDA dwellings (21.8%) and places (22.4%) in the market. Key findings of the survey and recommended actions for the NDIA are provided below.

Key findings

- The overall vacancy rates reported have been mostly steady over the past three years. Approximately **one-quarter (25.5%) of the respondents' New Build SDA places were vacant** at the time of the survey, which is similar to the rate reported in the 2022 *SDA Provider Experience Survey* (24.3%) and only slightly smaller than the rate in 2021 (30.5%).
- The building configurations with the **highest vacancy rates** were Fully Accessible Apartments (54.8%), Robust Houses (50.0%) and Robust Group Homes (50.0%).

¹ NDIA (2022). *Specialist Disability Accommodation: Operational guidelines*. National Disability Insurance Agency.

<https://ourguidelines.ndis.gov.au/supports-you-can-access-menu/home-and-living-supports/specialist-disability-accommodation>

² Winkler, D., Aimers, N., Rathbone, A., Douglas, J., Wellecke, C., Goodwin, I., & Mulherin, P. (2021). *Specialist Disability Accommodation Provider Experience Survey*. Housing Hub and Summer Foundation. <https://apo.org.au/node/316937>

³ Ibid; Wellecke, C., Robertson, J., Mulherin, P., Winkler, D., Rathbone, A., & Aimers, N. (2022). *Specialist Disability Accommodation provider experience survey: June 2022*. Housing Hub and Summer Foundation. <https://apo.org.au/node/318315>

- The building configurations with the **lowest vacancy rates** were High Physical Support Apartments (14.0%), Fully Accessible Villas/Townhouses/Duplexes (20.0%) and Robust Villas/Townhouses/Duplexes (22.0%).
- One of the most challenging aspects of filling New Build SDA vacancies was the **time the NDIA takes to make SDA decisions**, which was rated as ‘extremely challenging’ by 62.5% providers (down from 76.2% in 2022 and 76.9% in 2021).
- Overall, there was **little to no improvement in various challenges** associated with finding tenants and filling vacancies since 2021.
- Similar to 2021 and 2022, providers most commonly reported that it takes **3-6 months to fill a single vacancy** and **6-12 months to fill a project/group of dwellings in full**.
- **Most (78.0%) providers were receiving less than anticipated income** for at least some of their SDA places (which is an increase on 60.7% and 56.8% of providers in 2022 and 2021, respectively).
- The **majority (65.0%) of respondents reported being owed payments** by the NDIA (compared to 66.7% and 44.4% of providers in 2022 and 2021, respectively).
- The **total overdue payments were \$1.9 million** among respondents, of which 36.3% were overdue by more than 90 days.
- **Slow processing by the NDIA and issues with service bookings** were some of the main reasons contributing to overdue payments.
- Almost **one-third (29.0%) of respondents indicated that the positive outcomes of SDA** on people’s lives was one of the main strengths of the SDA market.

Recommendations

1. **Understand the continually high vacancy rates being reported.** Consider what factors are contributing to these rates that are within the remit of the NDIA as the steward of the SDA market (e.g. lack of activation of demand, lack of detailed data that signals to providers what is required to be developed, inefficient NDIA administrative processes).
2. **Improve the skills of key actors within the SDA market.** NDIA planners should understand SDA and associated supports so correct information is provided to participants and decisions are made consistent with the legislation. Participants with complex needs (the SDA cohort) should be funded for Level 3 Specialist Support Coordination that is delivered by skilled professionals. This will improve efficient use of public funds and enable quality submissions for SDA and support funding that can be handled efficiently by the NDIA.
3. **Accelerate the speed and accuracy of NDIA processes**, including administrative processing of payments, ensuring that when a plan is reviewed annually that the SDA service booking is created immediately, and improving the time taken to make decisions on SDA, support and assistive technology for participants.
4. **Establish an SDA contact team** within the NDIA to enable a single point of contact that provides skilled, fast and specialised advice and assistance with amending errors.
5. **Improve the SDA demand data** provided to the market to facilitate better decisions by providers and investors based on the housing needs and preferences of participants.
6. **In collaboration with other government agencies, effectively address misinformation** about the SDA market to tackle incorrect perceptions about SDA returns, avoid inappropriate housing

being developed and retail investors being taken advantage of.

7. **Improve the processes of SDA service bookings** by either enabling SDA providers to create service bookings themselves, providing more training to those responsible for creating them, or eliminating the need for service bookings.
8. **Ensure the NDIA pays SDA providers** the correct amount on time as per standard business rules.

Introduction

The National Disability Insurance Scheme (NDIS) provides housing payments to people with extreme functional impairment and/or very high support needs. These housing payments, as well as the bricks-and-mortar dwelling, are called Specialist Disability Accommodation (SDA). SDA is designed to be more accessible for eligible participants to enhance their independence and allow other supports to be delivered better or more safely.⁴ Utilising a market-based model to deliver more person-centred housing outcomes, participants found eligible for SDA can use their funding to choose a dwelling that meets their SDA budget from a registered provider to suit their needs and preferences.⁵ Previous research has established that having access to an appropriately located and designed home brings about numerous benefits, including enhanced community and social integration, improved emotional well-being, the ability to live independently, and increased access to recreational and vocational opportunities,⁶ all of which contribute to an improved quality of life.

Registered SDA providers are able to receive payments for their SDA once their dwelling has been enrolled with the National Disability Insurance Agency (NDIA) and a tenant with SDA funding is living in the property. In order to enrol dwellings, providers must submit information on the dwellings being enrolled such as the building type, occupancy, design category, number of bedrooms and location of the dwellings (see Appendix A for more information on the different types of SDA). As of June 2023, there were a total of 7,925 enrolled SDA dwellings across Australia; a 12% increase in the number of dwellings enrolled in the previous year.⁷ This total encompasses New Build (i.e. dwellings that were issued their first certificate of occupancy on or after the 1st of April 2016), Existing (i.e. dwellings without a certificate of occupancy for a New Build that are enrolled to house five or fewer long-term residents), and Legacy stock (i.e. dwellings without a certificate of occupancy for a New Build that are enrolled to house more than five long-term residents).⁸ Of the 7,925 enrolled SDA dwellings, approximately 48.2% (3,818) are categorised as New Build stock, which amounts to approximately 6,940 New Build places for participants.⁹

The anticipated demand for SDA is expected to reach 30,000 participants, with SDA funding in NDIS plans expected to total \$700 million per year upon full implementation of the SDA policy.¹⁰ The projected size of the market, once all expected participants eligible for SDA receive funding in their NDIS plans, is estimated to exceed \$12 billion.¹¹ Currently, there are 23,092 participants with SDA funding¹², and although this represents an annual increase of approximately 16% over the last three years, there are

⁴ NDIA (2022). *Specialist Disability Accommodation: Operational guidelines*. National Disability Insurance Agency.

<https://ourguidelines.ndis.gov.au/supports-you-can-access-menu/home-and-living-supports/specialist-disability-accommodation>

⁵ Ibid.

⁶ Oliver, S., Gosden-Kaye, E.Z., Winkler, D., Douglas, J.M. (2020). *The outcomes of individualised housing for people with disability and complex needs: A scoping review*. Disability and Rehabilitation. <https://www.tandfonline.com/doi/full/10.1080/09638288.2020.1785023>; Douglas, J.M, Winkler, D., Oliver, S., Liddicoat, S., D'Cruz, K. (2022). *Moving into housing designed for people with disability: Preliminary evaluation of outcomes*. Disability and Rehabilitation. <https://www.tandfonline.com/doi/full/10.1080/09638288.2022.2060343>

⁷ NDIA (2023). *NDIS quarterly report to disability ministers: Q4 2022-2023*. National Disability Insurance Agency. Supplement P, Fig. P.1. Downloaded 17 August 2023. <https://data.ndis.gov.au/reports-and-analyses/quarterly-report-supplements>

⁸ NDIA (2023). *SDA Pricing Arrangements and Price Limits 2023-24*. National Disability Insurance Agency.

<https://www.ndis.gov.au/providers/housing-and-living-supports-and-services/specialist-disability-accommodation/sda-pricing-and-payments>

⁹ NDIA (2023). *NDIS quarterly report to disability ministers: Q4 2022-2023*. National Disability Insurance Agency. Supplement P, Fig. P.4. & P.13. Downloaded 17 August 2023. <https://data.ndis.gov.au/reports-and-analyses/quarterly-report-supplements>

¹⁰ Commonwealth of Australia (2021). Senate Community Affairs Legislation Committee: Answers to questions on notice. Social Services Portfolio. NDIA SQ21-000118.

<https://www.aph.gov.au/api/qon/downloadattachment?attachmentId=be23f5a1-fbba-41f9-a389-e3cb9737563a>

¹¹ Madhavan, D., Mulherin, P., Winkler, D. (2021). *Specialist Disability Accommodation (SDA) Investor Think Tank: Findings and Recommendations*. Summer Foundation.

<https://www.summerfoundation.org.au/resources/specialist-disability-accommodation-sda-investor-think-tank-findings-and-recommendations/>

¹² NDIA (2023). *NDIS quarterly report to disability ministers: Q4 2022-2023*. National Disability Insurance Agency. Supplement P, Fig. P.1. Downloaded 17 August 2023. <https://data.ndis.gov.au/reports-and-analyses/quarterly-report-supplements>

approximately 6,908 participants who are yet to be approved for SDA or identified as having an SDA need. Additionally, just over half (i.e. \$365 million) of the \$700 million per year in expected expenditure for SDA funding has been allocated in participant plans.¹³ Therefore, it is clear that the SDA market has not yet realised its potential to support people with an SDA housing need as anticipated when SDA policy was developed. This may be indicative of challenges in the implementation of SDA policy.

In order to capture and build an evidence base of such challenges, including those faced by providers in the SDA market, the Housing Hub and Summer Foundation began conducting yearly *SDA Provider Experience Surveys* in 2021.¹⁴ The findings of the 2021 and 2022 surveys revealed that high vacancy rates and delayed remittance of SDA payments were the main contributing factors to providers being under significant financial pressure.¹⁵

It should be noted that the NDIA has recently undertaken a review of the SDA pricing structure,¹⁶ which may help address some of the challenges identified in the previous *SDA Provider Experience Surveys*. The review was one of the first major reviews of SDA pricing, setting new SDA funding amounts by evaluating the assumptions used to calculate SDA prices as well as the impact of current SDA prices on supply. Most building configurations saw an increase in pricing, with the exception of High Physical Support dwellings, which are believed to have previously been overpriced. The costs of maintenance, property and tenancy management were also proposed to be increased to better align with the actual cost of SDA in the current economic setting. The proposed changes to SDA pricing are hoped to incentivise the construction of SDA properties that parallels participant demand, rather than concentrates on High Physical Support dwellings. This, in turn, will help ensure participants have access to SDA dwellings that meet their needs.

The *SDA Pricing Review* also led to an increase in the vacancy rates that form part of the assumptions of SDA funding amounts. While the previous NDIA's pricing arrangements assumed vacancy rates of 3-10%,¹⁷ the newly proposed vacancy rates range between 7.75%-13.0%.¹⁸ It is encouraging to see acknowledgement of the high vacancy rates in the market however, there is evidence supporting a larger number of vacancies than what is assumed in both the previous and current pricing arrangements. Last year's *SDA Provider Experience Survey* indicated that providers may be facing a vacancy rate of approximately 25% in their New Build SDA places.¹⁹ Further, property websites for listing SDA vacancies also indicate a large number of current vacancies in the market, with 830 vacancies reported on the NDIA's SDA Finder Webpage as of June 2023²⁰ and over 2,000 vacancies on the Housing Hub.²¹ Prolonged vacancies negatively affect market confidence, pose a considerable financial risk and

¹³ NDIA (2023). *NDIS quarterly report to disability ministers: Q4 2022-2023*. National Disability Insurance Agency. Supplement P, Fig. P.1. Downloaded 17 August 2023. <https://data.ndis.gov.au/reports-and-analyses/quarterly-report-supplements>

¹⁴ Winkler, D., Aimers, N., Rathbone, A., Douglas, J., Wellecke, C., Goodwin, I., & Mulherin, P. (2021). *Specialist Disability Accommodation Provider Experience Survey*. Housing Hub and Summer Foundation. <https://apo.org.au/node/316937>

¹⁵ Ibid; Wellecke, C., Robertson, J., Mulherin, P., Winkler, D., Rathbone, A., & Aimers, N. (2022). *Specialist Disability Accommodation provider experience survey: June 2022*. Housing Hub and Summer Foundation. <https://apo.org.au/node/318315>

¹⁶ NDIA (2023). *Specialist Disability Accommodation Pricing Review 2022-23 - Final Report*. National Disability Insurance Agency. <https://www.ndis.gov.au/providers/housing-and-living-supports-and-services/specialist-disability-accommodation/sda-pricing-and-payments/sda-pricing-review>. Please note that while the pricing review was underway at the time of this year's SDA Provider Experience Survey, the final report summarising the outcomes of the review was released *after* our survey was conducted. Thus, the experiences and reflections shared in this year's SDA Provider Experience Survey likely reflect the market conditions under the old pricing assumptions.

¹⁷ NDIA (2022). *NDIS Pricing Arrangements for Specialist Disability Accommodation 2021-22*. National Disability Insurance Agency. <https://www.ndis.gov.au/providers/pricing-arrangements/pricing-arrangements-archive>

¹⁸ NDIA (2023). *Specialist Disability Accommodation Pricing Review 2022-23 - Final Report*. National Disability Insurance Agency. <https://www.ndis.gov.au/providers/housing-and-living-supports-and-services/specialist-disability-accommodation/sda-pricing-and-payments/sda-pricing-review>

¹⁹ Wellecke, C., Robertson, J., Mulherin, P., Winkler, D., Rathbone, A., & Aimers, N. (2022). *Specialist Disability Accommodation provider experience survey: June 2022*. Housing Hub and Summer Foundation. <https://apo.org.au/node/318315>

²⁰ NDIA (2023) *SDA Finder*. National Disability Insurance Agency.

<https://www.ndis.gov.au/participants/home-and-living/specialist-disability-accommodation-explained/sda-finder>

²¹ Summer Foundation (2023) *Housing Hub*. <https://www.housinghub.org.au/>

undermine the stability of the SDA market. Therefore, addressing the factors related to high vacancy rates is crucial for ensuring the financial viability of the market and confidence of SDA providers.

One factor compounding the vacancy risk in the SDA market is the low amount of SDA funding that participants are receiving. An analysis of line item payments shows that the average annualised payment for SDA was approximately \$17,000 as of June 2023.²² While this payment would likely facilitate living in Existing/Legacy stock dwellings, it is not enough to secure most types of New Build SDA. This is concerning, given that New Build SDA dwellings enable more independent living options, which are often the preferred choice for individuals seeking housing.²³ Moreover, there are at least 3,544 new SDA dwellings currently being built,²⁴ meaning that vacancy rates are likely to increase across all New Build SDA given current average payment amounts.

While vacancies in the SDA market pose a risk to providers and the Scheme, the NDIS is also facing rising costs for Supported Independent Living (SIL). SIL is a type of support that aims to help people with high support needs to live as independently as possible in their home, and includes help or supervision with daily tasks, such as cooking or personal care.²⁵ The rising SIL expenditure is evidenced by the notable increase in payments made by the NDIA to participants receiving SIL over the last two years. Such payments have more than doubled, from \$2.0 billion in the March 2021 quarter to \$3.1 billion in the March 2023 quarter.²⁶ Over the same time period, the number of participants receiving SIL funding only rose by 30% (from 24,201 in March 2021 to 31,368 in March 2023), suggesting a disproportionate increase in SIL costs.²⁷ Moreover, while only 5% (31,368)²⁸ of NDIS participants received SIL funding as of 31 March 2023, payments to participants with SIL comprised approximately one-third (\$10.7 billion)²⁹ of the total NDIS funding (\$32.9 billion)³⁰ in the 12 months to 31 March 2023. SDA could provide a means for containing or reducing SIL costs, with the NDIA recently acknowledging that “*SDA is a capital investment by the Scheme that is intended to reduce the lifetime support costs of an individual [...] and should be considered as an investment in Scheme sustainability rather than only as an expenditure by the Scheme*”.³¹ However, a large proportion of participants with SIL funding are likely eligible for SDA but are not currently receiving SDA funding. Identifying these participants is critical to help reduce Scheme costs as well as fill the large number of SDA vacancies.

In addition to vacancies, other challenges for SDA providers have been identified. Specifically, the majority of providers who participated in the 2021 and 2022 *SDA Provider Experience Surveys* were receiving less than anticipated income for some of their SDA.³² Further, some providers reported they

²² NDIA (2023) *Average support Line item Payments June 2023*. National Disability Insurance Agency.

<https://data.ndis.gov.au/data-downloads>

²³ Rothman, R., Wellecke, C., Rathbone, A., Winkler, D. & Aimers, N. (2022, November). *Housing Seeker Snapshot*. Melbourne, Australia: Housing Hub and Summer Foundation. <https://www.housinghub.org.au/resources/article/housing-hub-data-snapshot-housing-seekers>

²⁴ NDIA (2023). *NDIS quarterly report to disability ministers: Q4 2022-2023*. National Disability Insurance Agency. Supplement P, Table P.10. Downloaded 17 August 2023. <https://data.ndis.gov.au/reports-and-analyses/quarterly-report-supplements>

²⁵ NDIA (2022). *Supported Independent Living: Operational guidelines*. National Disability Insurance Agency.

<https://ourguidelines.ndis.gov.au/supports-you-can-access-menu/home-and-living-supports/supported-independent-living>

²⁶ NDIA (2023). *NDIS quarterly report to disability ministers: Q3 2022-2023*. National Disability Insurance Agency. Pg 86. Downloaded 26 June 2023. <https://www.ndis.gov.au/about-us/publications/quarterly-reports>

²⁷ Ibid. Pg 96.

²⁸ Ibid. Table P.1.

²⁹ Ibid. Pg 96.

³⁰ Ibid. Pg 84.

³¹ NDIA (2023). *Specialist Disability Accommodation Pricing Review 2022-23 - Final report*. National Disability Insurance Agency. Pg. 45.

<https://www.ndis.gov.au/providers/housing-and-living-supports-and-services/specialist-disability-accommodation/sda-pricing-and-payments/sda-pricing-review>

³² Winkler, D., Aimers, N., Rathbone, A., Douglas, J., Wellecke, C., Goodwin, I., & Mulherin, P. (2021). *Specialist Disability Accommodation Provider Experience Survey*. Housing Hub and Summer Foundation. <https://apo.org.au/node/316937>; Wellecke, C., Robertson, J.,

Mulherin, P., Winkler, D., Rathbone, A., & Aimers, N. (2022). *Specialist Disability Accommodation provider experience survey: June 2022*. Housing Hub and Summer Foundation. <https://apo.org.au/node/318315>

were owed millions of dollars in SDA payments from the NDIA, some for more than 90 days.³³ These payment issues create financial challenges and uncertainties for providers, which can have a detrimental impact on their operations and the overall stability of the SDA market. Thus, further exploration of these issues is warranted.

Documenting and monitoring the challenges in the SDA market is crucial in order to assess changes and identify ongoing issues. To contribute to this effort, the Housing Hub and Summer Foundation conducted this third *SDA Provider Experience Survey* in 2023. The aims of this survey were to expand the evidence base on the experiences of SDA providers and to quantify current commercial risks faced when operating in the SDA market. This survey also asked providers to reflect on their experiences to date, and provide information on a range of challenges, including:

- The main barriers and time taken to find tenants and fill vacancies;
- Dealing with government policies and processes; and
- Securing the timely payment of SDA funds from the NDIA.

The survey also asked providers to suggest possible improvements to the SDA market.

³³ Winkler, D., Aimers, N., Rathbone, A., Douglas, J., Wellecke, C., Goodwin, I., & Mulherin, P. (2021). *Specialist Disability Accommodation Provider Experience Survey*. Housing Hub and Summer Foundation. <https://apo.org.au/node/316937>; Wellecke, C., Robertson, J., Mulherin, P., Winkler, D., Rathbone, A., & Aimers, N. (2022). *Specialist Disability Accommodation provider experience survey: June 2022*. Housing Hub and Summer Foundation. <https://apo.org.au/node/318315>

Method

Recruitment

Following similar methods to the previous *SDA Provider Experience Surveys*, this study involved surveying a sample of SDA providers in Australia. Providers were recruited via email, social media posts on LinkedIn, as well as an industry peak body (PowerHousing). Providers' email addresses were drawn from the email distribution list used in Summer Foundation's and Housing Hub's most recent *SDA Supply Survey*.³⁴

Providers were advised that their participation was voluntary, that their responses were strictly confidential, and only de-identified, aggregated data would be published. No monetary incentives were offered for participation. However, providers were advised they would receive an advance copy of the report as a gesture of appreciation for their time completing the survey.

The survey was conducted on QuestionPro and remained open for 3 weeks, from 3 May 2023 to 24 May 2023.

Survey design

The survey consisted of 32 questions and took approximately 20 minutes to complete. Broadly, the survey asked providers to reflect on their experiences in the SDA market, including:

- The main barriers and time taken to find tenants and fill vacancies;
- Dealing with government policies and processes; and,
- Securing the timely payment of SDA funds from the NDIA.

Four open-ended questions also invited respondents to reflect on what was and was not working well in the SDA market based on their experience, as well as provide suggestions on areas in need of improvement.

Survey questions were similar to the previous *SDA Provider Experience Surveys*.³⁵ However, all survey questions this year focused on New Build SDA only, meaning the inclusion criteria was limited to providers of new SDA. In contrast, not all questions in previous surveys specified New Build SDA and therefore, these surveys also included a small number of providers who supplied only Existing or Legacy stock. For a definition of New Build SDA and Existing/Legacy SDA, please refer to the introduction.

Analyses

Quantitative and qualitative data was analysed using Excel. Qualitative responses were thematically analysed to identify common themes among the responses. Each response was coded by two researchers, and any discrepancies were discussed by the two coders to ensure agreement on themes.

As this was the third year the *SDA Provider Experience Survey* has been conducted, the data from the 2021, 2022, and 2023 surveys was compared to gain an understanding of how SDA market trends and

³⁴ Wellecke, C., Robertson, J., Mulherin, P., Rathbone, A., Winkler, D., Rothman, R., & Aimers, N. (2022). *Specialist Disability Accommodation Supply in Australia*. Housing Hub and Summer Foundation. <https://apo.org.au/node/318315>

³⁵ Winkler, D., Aimers, N., Rathbone, A., Douglas, J., Wellecke, C., Goodwin, I., & Mulherin, P. (2021). *Specialist Disability Accommodation provider experience survey*. Housing Hub and Summer Foundation. <https://apo.org.au/node/316937>; Wellecke, C., Robertson, J., Mulherin, P., Rathbone, A., Winkler, D., Rothman, R., & Aimers, N. (2022). *Specialist Disability Accommodation provider experience survey*. Housing Hub and Summer Foundation. <https://apo.org.au/node/318315>

perspectives have changed over the years. This granted us a unique opportunity to assess potential patterns and comment on which issues appear to be stagnant or have improved. However, given that the same providers were not involved in all three of the *SDA Provider Experience Surveys*, the over-time comparisons need to be interpreted with caution.

Please also note that the type of SDA providers captured in the 2021 and 2022 surveys differed to this year's survey, given that the samples in the previous two surveys also included providers who supplied only Existing and/or Legacy stock. To enable comparisons between survey results across the three years, any providers of Existing and/or Legacy stock were removed from the 2021 and 2022 survey results and all statistics were re-calculated. In total, this left 27 providers from the 2021 survey and 21 providers from the 2022 survey for the time comparisons. Given this change in the samples, the statistics reported for the 2021 and 2022 surveys in the below sections differ to what was previously reported in the *2021 SDA Provider Experience Report*³⁶ and *2022 SDA Provider Experience Report*.³⁷

³⁶ Winkler, D., Aimers, N., Rathbone, A., Douglas, J., Wellecke, C., Goodwin, I., & Mulherin, P. (2021). *Specialist Disability Accommodation provider experience survey*. Housing Hub and Summer Foundation. <https://apo.org.au/node/316937>

³⁷ Wellecke, C., Robertson, J., Mulherin, P., Rathbone, A., Winkler, D., Rothman, R., & Aimers, N. (2022). *Specialist Disability Accommodation provider experience survey*. Housing Hub and Summer Foundation. <https://apo.org.au/node/318315>

Results

Sample

A total of 111 SDA providers commenced the survey. Of those, 54 responses provided insufficient information to be included,³⁸ 6 responses were duplicates,³⁹ and 10 responses were from providers who did not meet eligibility criteria to participate.⁴⁰ These responses were excluded from data analysis, leaving a final sample of 41 respondents. The descriptive statistics for responses are presented below. Please note that the number of respondents (indicated by the symbol: *n*) for each question varies as respondents could choose to leave questions blank.

Description of the sample

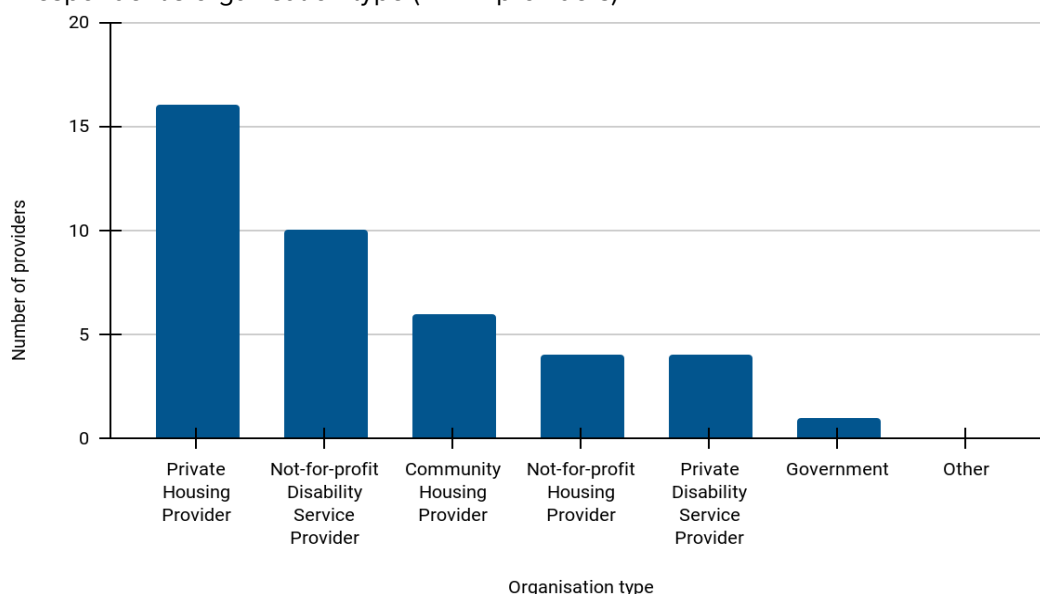
Enrolled New Build SDA dwellings and places

According to NDIA data, there was a national total of 3,571 New Build SDA dwellings with 6,483 places enrolled with the NDIA, as of 31 March 2023.⁴¹ Of our 41 survey respondents, 39 reported the number of New Build SDA dwellings and places they currently provide, summing to a total of 779 dwellings with 1,452 places. This represents almost one-quarter of all New Build SDA dwellings (21.8%) and New Build SDA places (22.4%) enrolled with the NDIA.

Organisation type

As displayed in Figure 1, out of the 41 SDA providers who completed the survey, private housing providers (39.0%) made up the largest portion of the sample which is consistent with our samples from the two preceding surveys. This was followed by not-for-profit disability service providers (24.4%), community housing providers (14.6%), not-for-profit housing providers (9.8%), and private disability service providers (9.8%). The least common type were government organisations (2.4%).

Figure 1 – Respondent’s organisation type (*n* = 41 providers)



³⁸ That is, they only provided brief information about their organisation but did not respond to any questions assessing their experiences and sentiment in the market.

³⁹ That is, the same organisation completed the survey twice.

⁴⁰ That is, these respondents were not providers of New Build SDA.

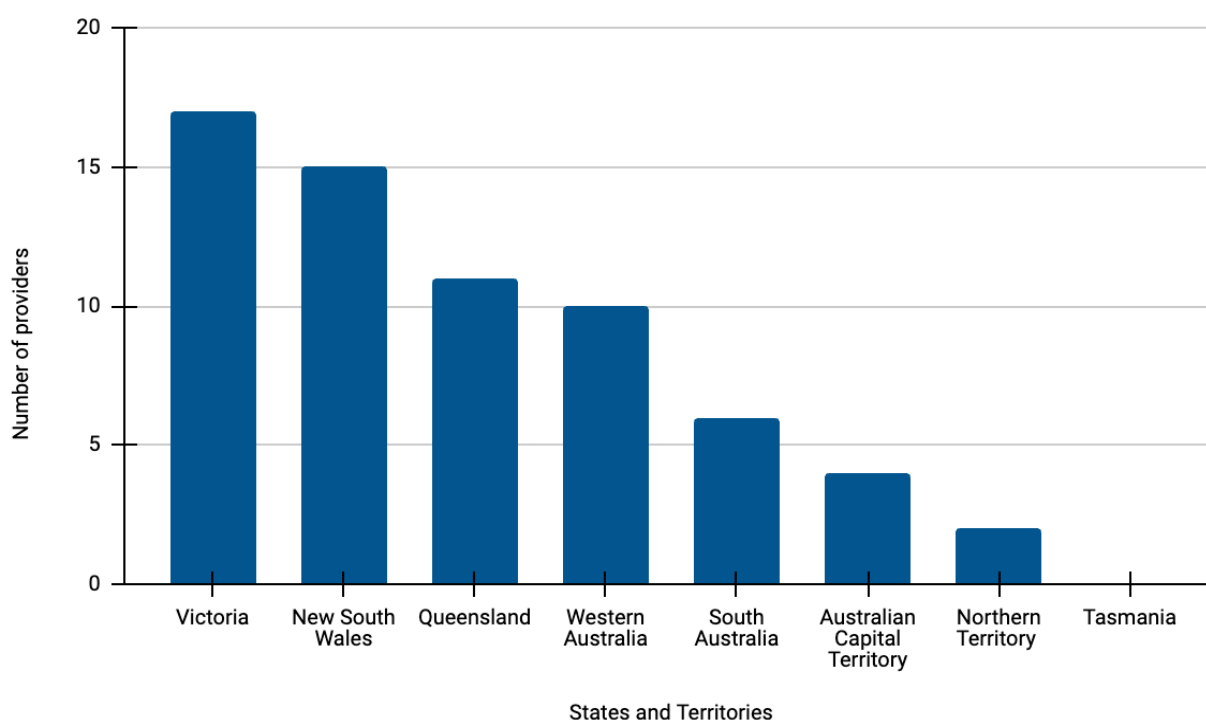
⁴¹ NDIA (2022). *NDIS quarterly report to disability ministers: Q3 2022-2023*. National Disability Insurance Agency. Table P. 4 & P. 13. Downloaded 26 June 2023. <https://www.ndis.gov.au/about-us/publications/quarterly-reports>. Please note that the Q3 NDIS quarterly report was the most up-to-date report at the time the analyses for this survey were conducted.

Location

Respondents in our sample reported providing new SDA in all states and territories in Australia, except Tasmania. As seen in Figure 2, the majority of respondents currently supplied new SDA in Victoria (41.5%), followed by New South Wales (36.6%), Queensland (26.8%), and Western Australia (24.4%). A small number of respondents were supplying new SDA in South Australia (14.6%), the Australian Capital Territory (9.8%) and the Northern Territory (4.9%).

Overall, the geographical distribution of the respondents in our sample was largely consistent with the distribution of all SDA providers that were active as of 31 March 2023 according to the NDIA.⁴² In both NDIA data and our sample, the regions with the smallest proportion of providers were Tasmania, the Australian Capital Territory, and the Northern Territory, while the regions with the most SDA providers were New South Wales, Victoria, and Queensland. Of note, the proportion of providers supplying New Build SDA in Victoria and Western Australia appeared to be overrepresented in our sample (41.5% and 24.4%) compared to the nationwide distribution (27.5% and 9.5%).

Figure 2 – Number of respondents supplying New Build SDA in each state and territory in Australia ($n = 41$ providers)



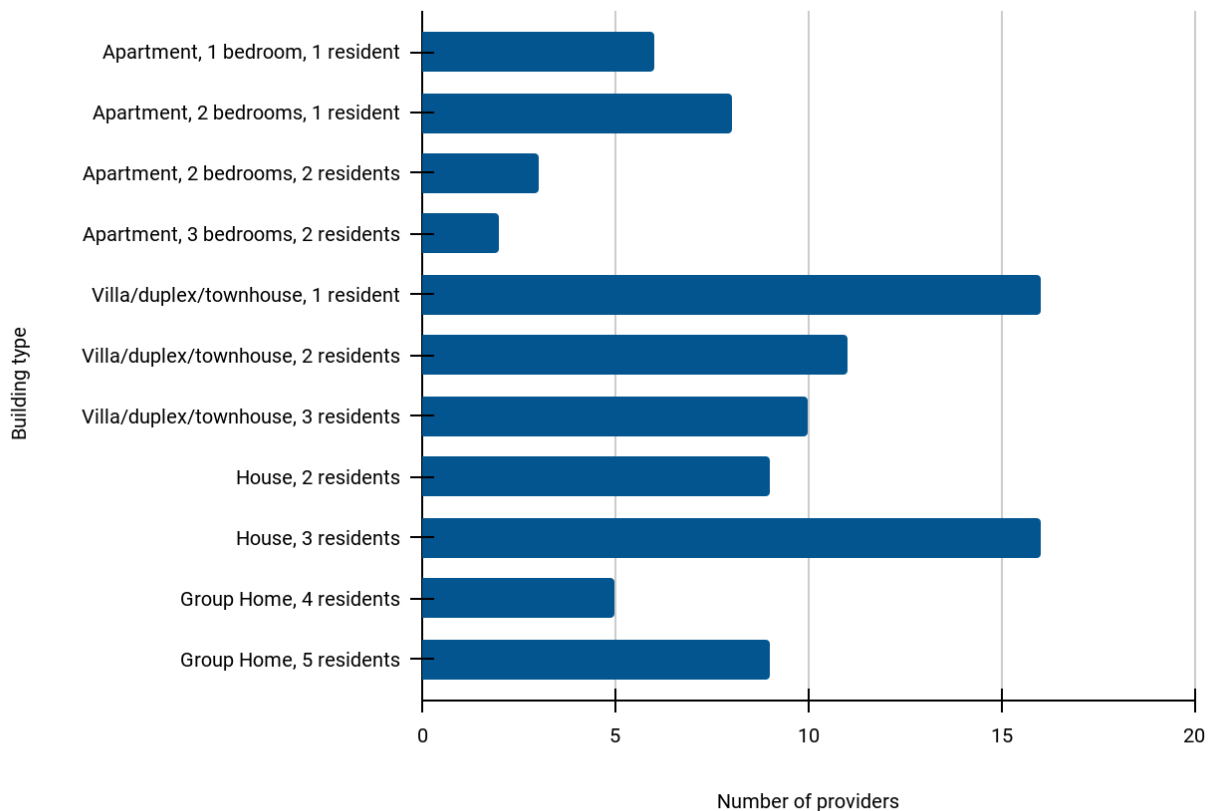
Note: Respondents were able to select multiple options.

⁴² NDIA (2022). *NDIS quarterly report to disability ministers: Q3 2022-2023*. National Disability Insurance Agency. Table P. 3. Downloaded 26 June 2023. <https://www.ndis.gov.au/about-us/publications/quarterly-reports>. Please note that the Q3 NDIS quarterly report was the most up-to-date report at the time the analyses for this survey were conducted.

Building type

As seen in Figure 3, the most commonly provided building types were 3-resident Houses and 1-resident Villas/Duplexes/Townhouses, which were both supplied by 41.0% of respondents. The least commonly supplied building types were 4-resident Group Homes (12.8%) and 2-resident Apartments (7.7% for 2-bedroom and 5.1% for 3-bedroom configurations).

Figure 3 – Number of respondents supplying each building type and configuration of New Build SDA ($n = 39$ providers)

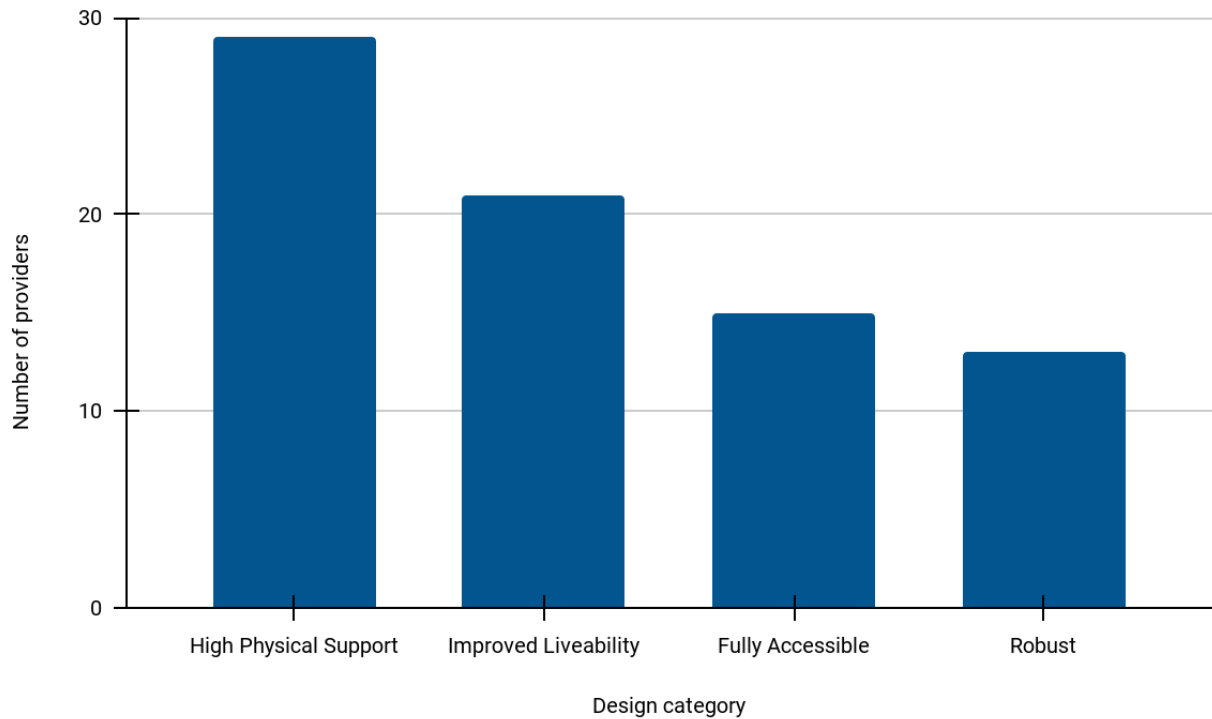


Note: Respondents were able to select multiple options.

Design category

As seen in Figure 4, the majority of respondents (74.4%) were currently providing High Physical Support dwellings. This was followed by Improved Liveability (53.8%), Fully Accessible (38.5%) and Robust (33.3%).

Figure 4 – Number of respondents supplying each design category of New Build SDA ($n = 39$ providers)



Note: Respondents were able to select multiple options.

Committed capital to New Build SDA

Respondents were asked to indicate the total amount of capital they have committed to building new SDA. Out of the 41 respondents, 3 did not respond to the question, and 5 indicated they had not committed any capital. Upon following up with these 5 respondents, 3 explained that they had not committed any capital because their organisation manages but does not build SDA properties, and therefore, their expenses comprise operational instead of capital costs.

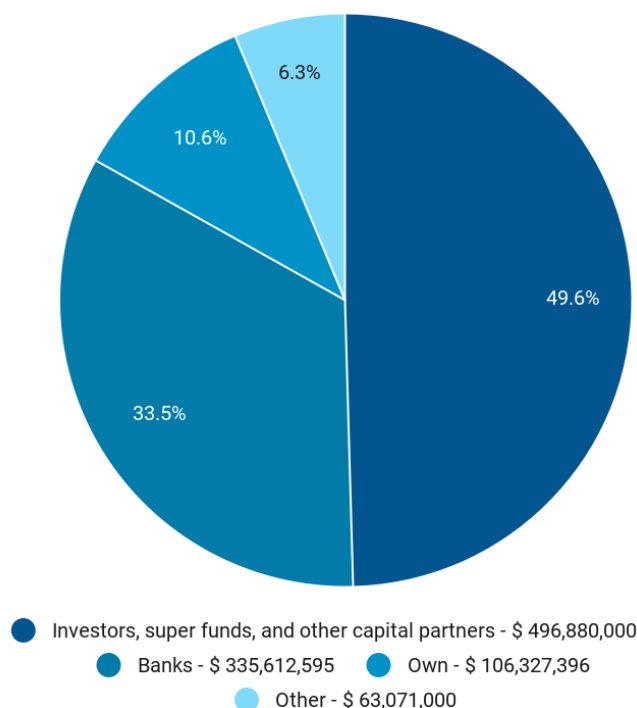
Among the remaining 33 providers, there was a wide range of responses, with the highest declared amount being \$300,000,000, and the lowest being \$660,000. The total amount of capital committed by the survey respondents was \$1,001,890,992 (over \$1 billion).

Financing of New Build SDA

The funding sources among the 33 respondents who had committed capital to new SDA were also explored. To assess this, providers were asked to indicate what percentage of their new SDA was financed by (1) banks, (2) investors, super funds, and other capital partners, (3) their own organisation, and (4) other sources. The percentages reported were then weighted against the organisation's total amount of capital committed to new SDA. Results of this analysis are shown in Figure 5, displaying the percentages and amount of capital that stem from each funding source.

As can be seen, almost half (49.6%) of the capital committed - comprising almost \$500 million - was financed by 'Investors, super funds, and other capital partners', making this the largest funding source. This was closely followed by 'Banks', which had funded a third (33.5%, or \$335.6 million) of the respondents' capital committed to new SDA. A much smaller proportion of the capital was funded by the respondent's own organisation (10.6%) and 'other' (6.3%) funding sources, which included for example, government grants.

Figure 5 - Capital committed to new SDA broken down by funding sources ($n = 33$ providers)



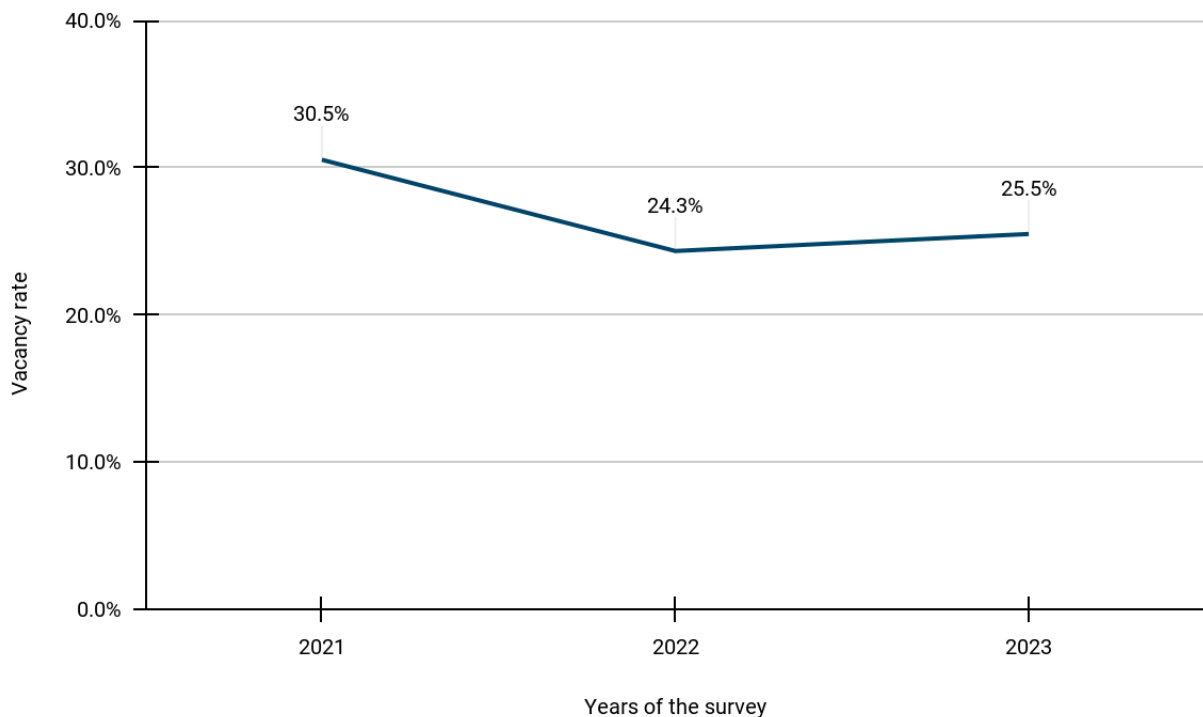
Vacancies and lease times in New Build SDA

Vacancy rates for New Build SDA over time

Figure 6 shows the vacancy rates for New Build SDA reported in the 2021, 2022 and 2023 SDA Provider Experience Surveys.

In the 2023 survey, vacancy data was available for 1,412 New Build SDA places.⁴³ Of these 1,412 places, approximately a quarter (25.5%; 360 places) were vacant at the time of the survey. This was very similar to the vacancy rates reported in the 2022 survey (24.3%),⁴⁴ and represents only a slight drop since 2021 (30.5%).⁴⁵

Figure 6 - Changes in vacancy rates between 2021 to 2023 (n = 26, 21, 39 providers respectively)



Vacancy rates for New Build SDA by building type and design category

For the first time, this year’s survey also explored a break-down of the overall vacancy rate by building type and design category. This break-down is shown in Table 1.

When broken down, it can be seen that the building type with the highest vacancy rate was ‘Houses’ at 30.9%, while the building type with the lowest vacancy rate was ‘Apartments’ at 21.2%. In terms of design

⁴³ Please note that this is slightly lower than the total number of places supplied by our respondents (1,452 places) because vacancy information was missing for some of the reported SDA places.

⁴⁴ The vacancy rate (24.3%) from 2022 was based on 1,097 SDA places across 21 respondents, of which 267 places were vacant at the time of the survey

⁴⁵ The vacancy rate (30.5%) from 2021 was based on 1,241 SDA places across 26 respondents, of which 379 places were vacant at the time of the survey

categories, Fully Accessible and Robust had the highest vacancies (at 39.5% and 33.7%, respectively), while High Physical Support had the lowest vacancies at 23.3%.

When looking at building types and design categories in combination, the highest vacancy rates were observed in Fully Accessible Apartments and Houses as well as Robust Houses and Group Homes, with approximately half of the New Build SDA places in these dwelling types being vacant. The lowest vacancy rate reported was for High Physical Support Apartments. Potential reasons for these differences in vacancy rates are explored in the discussion.

Table 1 - Vacancy rates in New Build SDA by design category and build type (*n* = 39 providers)

	Improved Liveability	Fully Accessible	Robust	High Physical Support	Grand total vacancy rate
Apartment	27.2%	54.8%	Not possible	14.0%	21.2%
Villa/duplex/townhouse	26.1%	20.0%	22.0%	22.6%	23.5%
House	26.8%	40.0%	50.0%	29.8%	30.9%
Group Home	23.3%	30.0%	50.0%	22.2%	24.5%
Grand total vacancy rate	25.9%	39.5%	33.7%	23.3%	25.5%

Although informative, it is important to flag potential limitations associated with the vacancy data presented above. Firstly, the vacancy rates were based on differing sample sizes - that is, the total number of places from which the vacancy rates were calculated differed between the design categories and building types. For example, as can be seen in Table 2, the vacancy rate for High Physical Support was based on a much larger sample than the calculations for Fully Accessible and Robust design. These differences in sample sizes should be kept in mind when interpreting the vacancy rates. However, it should be noted that when comparing the proportion of SDA places in our sample to the national proportion of all SDA places reported by the NDIA, it appears that the differences in our sample sizes are representative of the national SDA market (see Table 3). For example, similar to the proportions in our sample, the NDIA also reports a substantially larger proportion of High Physical Support places than Fully Accessible or Robust places.

Secondly, this survey did not collect information on the enrollment times of the properties reported. As a result, it is unclear how long the properties have been standing vacant. It is possible that some of the properties were vacant because they were new to the market, which may have inflated the observed vacancy rates.

Table 2 - Number of places and vacant places in New Build SDA by design category and build type (n = 39 providers)

	Improved Liveability		Fully Accessible		Robust		High Physical Support		Grand Total	
	Total places	Vacant places	Total places	Vacant places	Total places	Vacant places	Total places	Vacant places	Total places	Vacant places
Apartment	81	22	31	17	*	*	214	30	326	69
Villa/duplex/town house	111	29	20	4	50	11	159	36	340	80
House	41	11	25	10	16	8	362	108	444	137
Group Home	60	14	10	3	20	10	212	47	302	74
Grand Total	293	76	86	34	86	29	947	221	1,412	360

Note: * = Not possible. 'Total places' comprise the number of both vacant places and tenanted places.

Table 3 - Comparison of the proportion of all SDA places nationally⁴⁶ and SDA places reported in our survey sample by design type and build type (n = 6,420 national SDA places, 1,412 SDA places in survey)

Design category	Improved Liveability		Fully Accessible		Robust		High Physical Support		Totals	
	National	Survey sample	National	Survey sample	National	Survey sample	National	Survey sample	National	Survey sample
Proportion	19.1%	20.8%	13.5%	6.1%	10.8%	6.1%	56.6%	67.1%	100%	100%
Places	1,226	293	867	86	696	86	3,631	947	6,420	1,412
Build type	Apartment		Villa/duplex/town house		House		Group Home		Totals	
	National	Survey sample	National	Survey sample	National	Survey sample	National	Survey sample	National	Survey sample
Proportion	23.1%	23.1%	23.3%	24.1%	30.0%	31.4%	23.6%	21.4%	100%	100%
Places	1,486	326	1,494	340	1,928	444	1,512	302	6,420	1,412

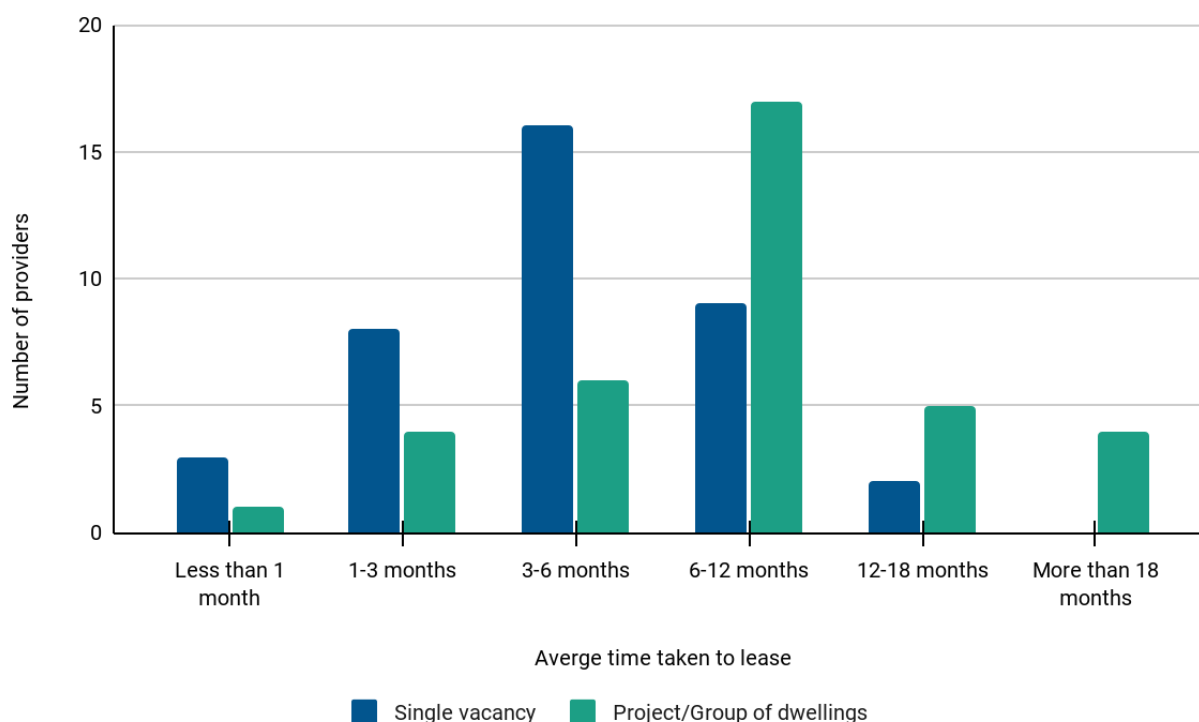
Note: The NDIA also reports on a small number of dwellings with a multi-design category - these dwellings are not shown in this table as the Provider Experience Survey did not collect data on this category

⁴⁶ NDIA (2022). NDIS quarterly report to disability ministers: Q3 2022-2023. National Disability Insurance Agency. Table P.13. Downloaded 26 June 2023. <https://www.ndis.gov.au/about-us/publications/quarterly-reports>. Please note that the Q3 NDIS quarterly report was the most up-to-date report at the time the analyses for this survey were conducted.

Time taken to lease New Build SDA properties

As seen in Figure 7, almost half of the providers (42.1%) reported that it takes, on average, 3-6 months to lease a single vacancy. Not surprisingly, the time taken to lease a project/group of dwellings was reported to be longer. Specifically, 45.9% of providers reported that it typically takes 6-12 months to lease a new project in full.

Figure 7 - Average time taken for respondents to fill a single vacancy in a new project ($n = 38$ providers) and a new project or group of dwellings in full ($n = 37$ providers)



Interestingly, a similar trend in the average time taken to fill a single vacancy and a group/project of dwellings in full has been found over time. As can be seen in Figure 8 and Figure 9, most providers reported that it took, on average, 3-6 months to fill a single vacancy and 6-12 months to fill a project/group of dwellings in full in 2021, 2022 and 2023.

Of note, it appears that there has been a slight reduction in the proportion of providers who face very long timeframes to fully lease properties this year. For example, only 5.3% of providers indicated that it took, on average, 12-18 months to fill a single vacancy, which is a lower proportion of providers in comparison to 2022, wherein this was experienced by 29.4% of providers (see Figure 8). A possible reason for this higher proportion of providers in 2022 was the tendency for the NDIA to not provide SDA funding for single resident SDA applications, causing SDA dwellings to be vacant for longer.⁴⁷ Likewise, Figure 9 suggests that long fill times for a project/group of dwellings may also be decreasing. That is, the proportion of providers who have experienced fill times of 12 months or more appears to have been slightly decreasing since 2021.

⁴⁷ Skipsey, M., Winkler, D., Cohen, M., Mulherin, P., Rathbone, A., Efsthathiou, M. (2022). *Housing delayed and denied: NDIA decision-making on Specialist Disability Accommodation*. Public Interest Advocacy Centre and Housing Hub. <https://piac.asn.au/2022/04/30/housing-delayed-and-denied-ndia-decision-making-on-specialist-disability-accommodation-funding/>

Figure 8 - Change in time taken for respondents to fill a single vacancy in 2021, 2022 and 2023 (n = 18, 17, 38 providers respectively)

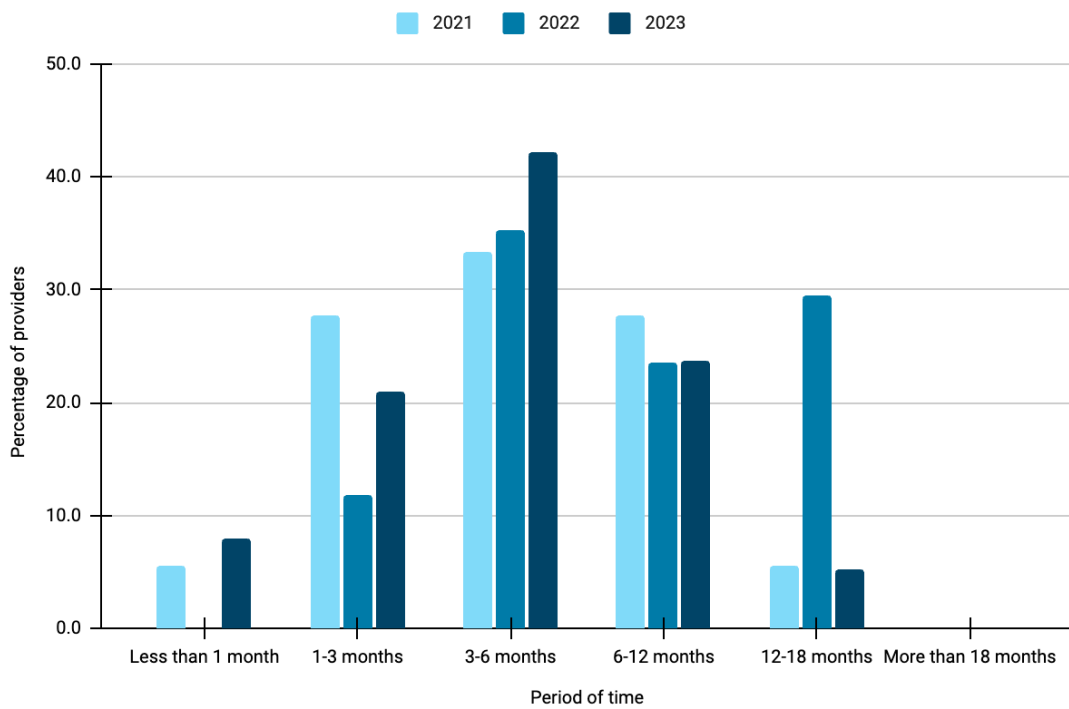
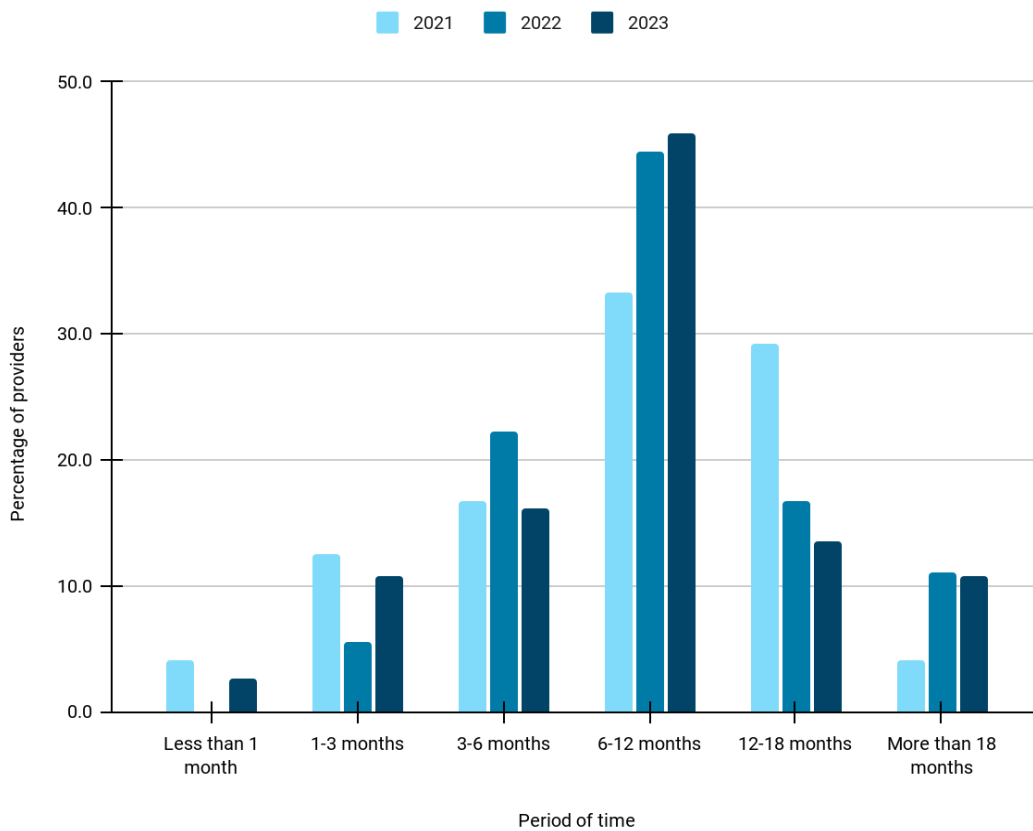


Figure 9 - Change in time taken for respondents to fill a group of dwellings in full 2021, 2022 and 2023 (n= 24, 18, 37 providers respectively)



Support providers

Encouragingly, despite the high vacancy rates, only 4 out of 39 respondents (10.3%) indicated that they have dwellings which are no longer sustainable for disability support providers to continue to provide on-site shared support (OSS) due to prolonged vacancies. These 4 providers reported a total of 12 dwellings as unsustainable, averaging 3 unsustainable dwellings per provider.

Challenges with finding tenants, filling vacancies, and after tenants have moved in

The following analyses examined common challenges faced by providers, relating to three main topics: ‘Finding tenants’, ‘Filling SDA vacancies’, and ‘issues after tenants move in’. Providers were asked to rate how challenging they find different aspects relating to these three themes on a 5-point Likert scale, from “Not Challenging” to “Extremely Challenging”.

The heatmaps below present the percentage distribution of respondents across the five challenge sentiments for each specific challenge.

In addition, the perceptions towards these challenges were also compared across the three surveys to assess if these issues have worsened, improved, or remained stagnant - the results of this analysis are shown in the bar charts below. In order to compare the data over time, each challenge sentiment was assigned a numerical value from 1 - 5 (i.e., “Not challenging” = 1, “Slightly challenging” = 2, etc.). The providers’ responses were then averaged for each challenge, allowing comparisons over time (i.e., 2021, 2022 and 2023).

Challenges related to finding tenants

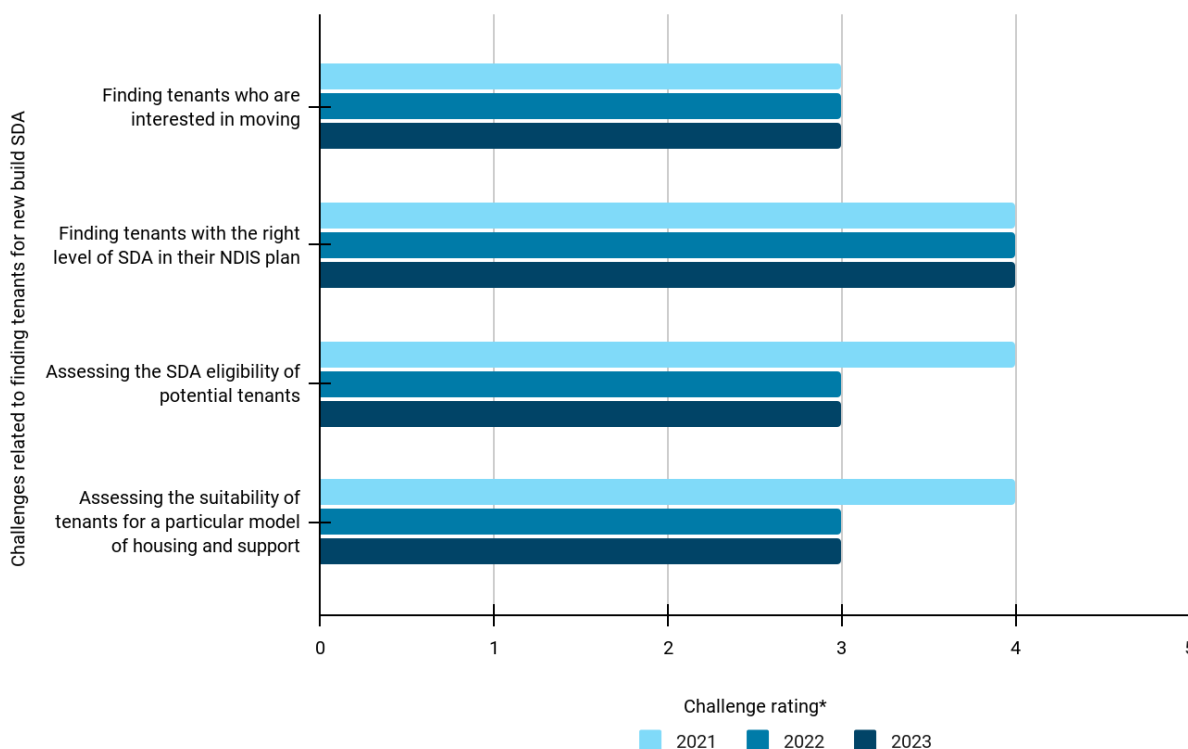
Providers were asked to reflect on how challenging different aspects of finding SDA tenants were (see Table 4). The most challenging aspect in 2023 was finding participants with the right level of SDA in their plan, with almost half of respondents reporting this aspect as “Extremely challenging” (48.8%). The second most challenging aspect was assessing the suitability of tenants for a particular model of housing and support, which was rated as “Moderately challenging” by over a third (35.9%) of respondents. This was followed closely by the challenge of assessing the SDA eligibility of potential tenants, which was also rated as “Moderately challenging” by over a third (35.0%) of respondents.

Table 4 – The extent of various challenges associated with finding tenants ($n = 39 - 41$ providers).

How challenging are the following aspects of finding tenants for New Build SDA?					
	Not challenging	Slightly challenging	Somewhat challenging	Moderately challenging	Extremely challenging
Finding tenants who are interested in moving ($n = 39$)	17.9%	17.9%	20.5%	25.6%	17.9%
Finding tenants with the right level of SDA in their NDIS plan ($n = 41$)	2.4%	7.3%	7.3%	34.1%	48.8%
Assessing the SDA eligibility of potential tenants ($n = 40$)	17.5%	15.0%	22.5%	35.0%	10.0%
Assessing the suitability of tenants for a particular model of housing and support ($n = 39$)	10.3%	17.9%	28.2%	35.9%	7.7%

As depicted in Figure 10, overall trends surrounding challenges related to finding tenants for New Build SDA have remained fairly stable across the three years the *SDA Provider Experience Survey* has been run. On average, all challenges were rated as either “*Somewhat challenging*” or “*Moderately challenging*”. Finding tenants with the right level of SDA has consistently been one of the most challenging issues across 2021, 2022 and 2023. This stable trend across time also applied to the challenge of finding tenants who are interested in moving, where providers on average rated this challenge as “*Somewhat challenging*” across the three years. Only slight improvements in challenge sentiment were noted for the challenges of assessing the SDA eligibility and suitability of potential tenants for a particular model of housing and support.

Figure 10 – Challenges related to finding tenants for New Build SDA across the years (2021, 2022, & 2023).



***Key to challenge rating.**

- 1** = Not challenging
- 2** = Slightly challenging
- 3** = Somewhat challenging
- 4** = Moderately challenging
- 5** = Extremely challenging.

Challenges related to filling New Build SDA vacancies

This survey also investigated challenges related to filling SDA vacancies (see Table 5). Based on our sample's responses, two aspects stood out as particularly challenging, that being the time taken by the NDIA to make decisions regarding SDA and the time taken to make decisions about support. These aspects were deemed “*Extremely challenging*” by 62.5% and 55.3% of respondents, respectively.

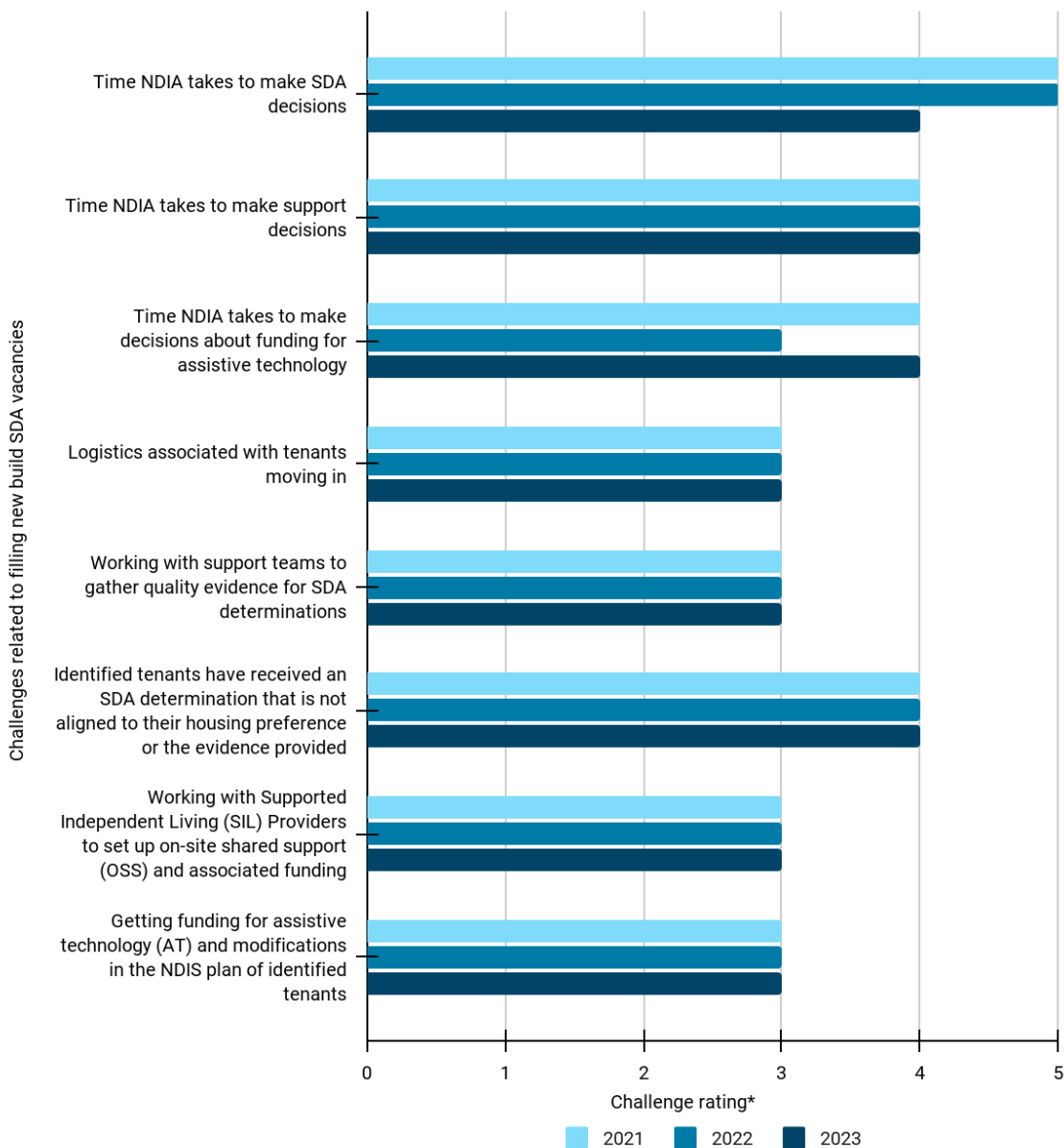
Furthermore, 46.2% of respondents expressed that it was “*Extremely challenging*” when identified tenants received an SDA determination that did not align with their housing preference or the evidence provided. The time the NDIA takes to make decisions about funding for Assistive Technology (AT) was also felt to be “*Extremely challenging*” by 41.9% of providers.

Table 5 – The extent of various challenges associated with filling New Build SDA vacancies. (*n* = 31 - 40 providers).

How challenging are the following aspects of filling vacancies in New Build SDA?					
	Not challenging	Slightly challenging	Somewhat challenging	Moderately challenging	Extremely challenging
Time NDIA takes to make SDA decisions (<i>n</i> = 40)	0.0%	2.5%	10.0%	25.0%	62.5%
Time NDIA takes to make support decisions (<i>n</i> = 38)	0.0%	2.6%	13.2%	28.9%	55.3%
Time NDIA takes to make decisions about funding for assistive technology (<i>n</i> = 31)	3.2%	9.7%	16.1%	29.0%	41.9%
Logistics associated with tenants moving in (<i>n</i> = 40)	12.5%	40.0%	12.5%	25.0%	10.0%
Working with support teams to gather quality evidence for SDA determinations (<i>n</i> = 38)	7.9%	18.4%	36.8%	21.1%	15.8%
Identified tenants have received an SDA determination that is not aligned to their housing preference or the evidence provided (<i>n</i> = 39)	2.6%	10.3%	10.3%	30.8%	46.2%
Working with Supported Independent Living (SIL) providers to set up on-site shared support (OSS) and associated funding (<i>n</i> = 37)	18.9%	24.3%	29.7%	21.6%	5.4%
Getting funding for assistive technology (AT) and modifications in the NDIS plan of identified tenants (<i>n</i> = 31)	6.5%	19.4%	29.0%	25.8%	19.4%

When comparing our responses across the years, trends for all challenges related to filling new SDA vacancies appeared to have remained relatively stagnant over time, with only one aspect having improved in challenge sentiment in 2023 compared to the previous two surveys. That is, the time the NDIA takes to make SDA decisions has on average improved in sentiment from “*Extremely challenging*” in 2021 and 2022, to “*Moderately challenging*” in 2023. See Figure 11.

Figure 11 – Challenges related to filling New Build SDA vacancies across the years (2021, 2022, & 2023)



***Key to challenge rating.**

- 1** = Not challenging
- 2** = Slightly challenging
- 3** = Somewhat challenging
- 4** = Moderately challenging
- 5** = Extremely challenging.

Challenges once tenants have moved in

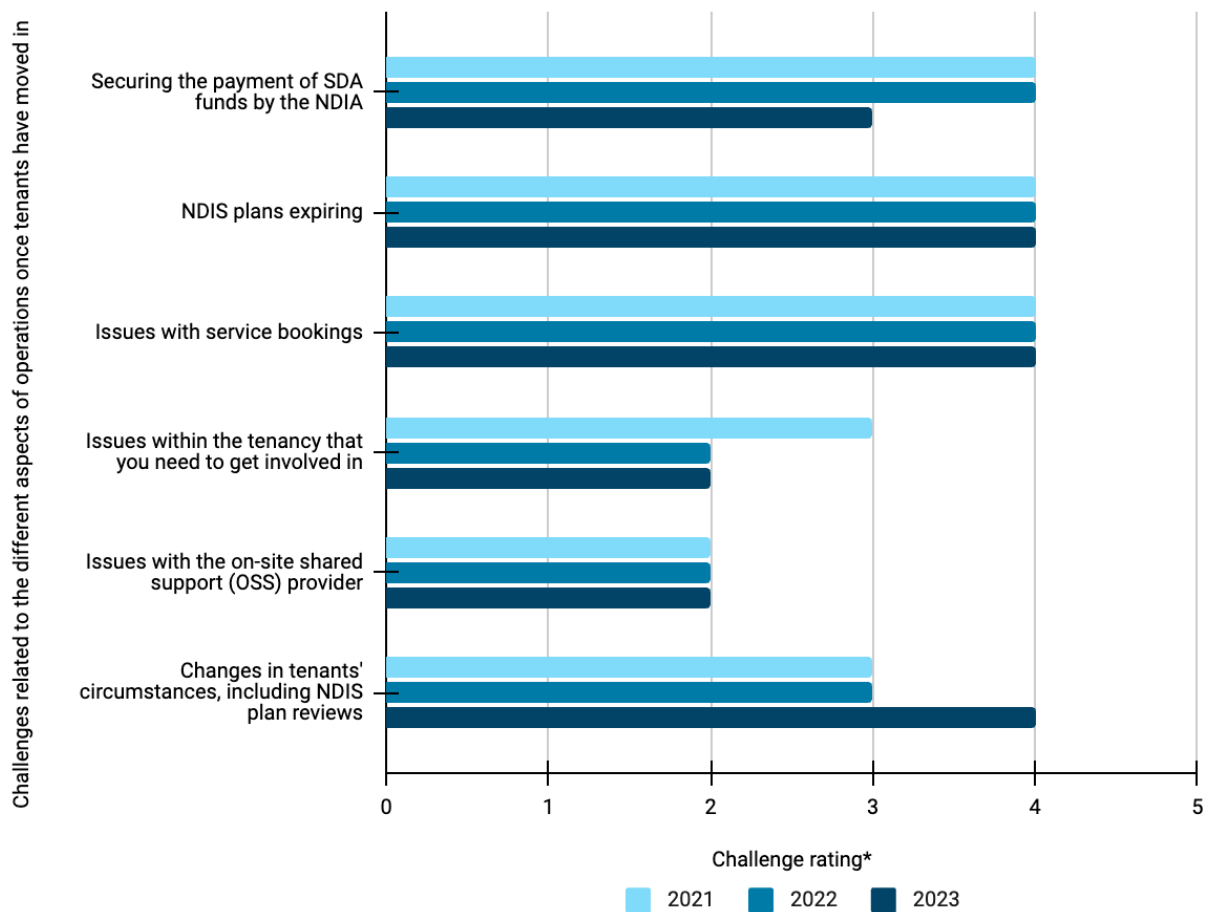
Respondents were asked about a range of possible challenges experienced once tenants have moved into their New Build SDA properties (see Table 6). Most frequently reported as “*Extremely challenging*” were issues with service bookings (41.0%) and the challenge of NDIS plans expiring (39.5%). In addition, over half of respondents (55.2%) indicated that changes in tenants' circumstances, including NDIS plan reviews, were either “*Moderately challenging*” or “*Extremely challenging*”. There were two aspects that were rated as “*Not challenging*” by a notable portion of respondents - these were ‘issues related to tenancy that providers would need to get involved in’ (37.5%) and ‘issues related to the OSS provider’ (34.2%).

Table 6 – Extent of various challenges once tenants have moved. (*n* = 38 - 40 providers).

How challenging are the different aspects of business once tenants have moved in?					
	Not challenging	Slightly challenging	Somewhat challenging	Moderately challenging	Extremely challenging
Securing the payment of SDA funds by the NDIA (<i>n</i> = 40)	7.5%	22.5%	22.5%	17.5%	30.0%
NDIS plans expiring (<i>n</i> = 38)	7.9%	10.5%	23.7%	18.4%	39.5%
Issues with service bookings (<i>n</i> = 39)	5.1%	20.5%	17.9%	15.4%	41.0%
Issues within the tenancy that you need to get involved in (<i>n</i> = 40)	37.5%	25.0%	17.5%	15.0%	5.0%
Issues with the on-site shared support (OSS) provider (<i>n</i> = 38)	34.2%	26.3%	26.3%	7.9%	5.3%
Changes in tenants' circumstances, including NDIS plan reviews (<i>n</i> = 38)	2.6%	21.1%	21.1%	28.9%	26.3%

When comparing how providers perceived the above challenges across the years, the average sentiment towards each challenge has remained fairly stable (see Figure 12). However, ‘changes in tenants’ circumstances, including NDIS plan reviews’ has worsened from being ranked as “*Somewhat challenging*” in 2021 and 2022, to being perceived as “*Moderately challenging*” in 2023. Displaying a contrasting pattern, the challenge of securing the payment of SDA funds by the NDIA has improved from being perceived as “*Moderately challenging*” in 2021 and 2022, to now being ranked as “*Somewhat challenging*” in 2023.

Figure 12 – Challenges related to the different aspects of operations once tenants have moved into a New Build SDA across the years (2021, 2022, & 2023)



***Key to challenge rating.**

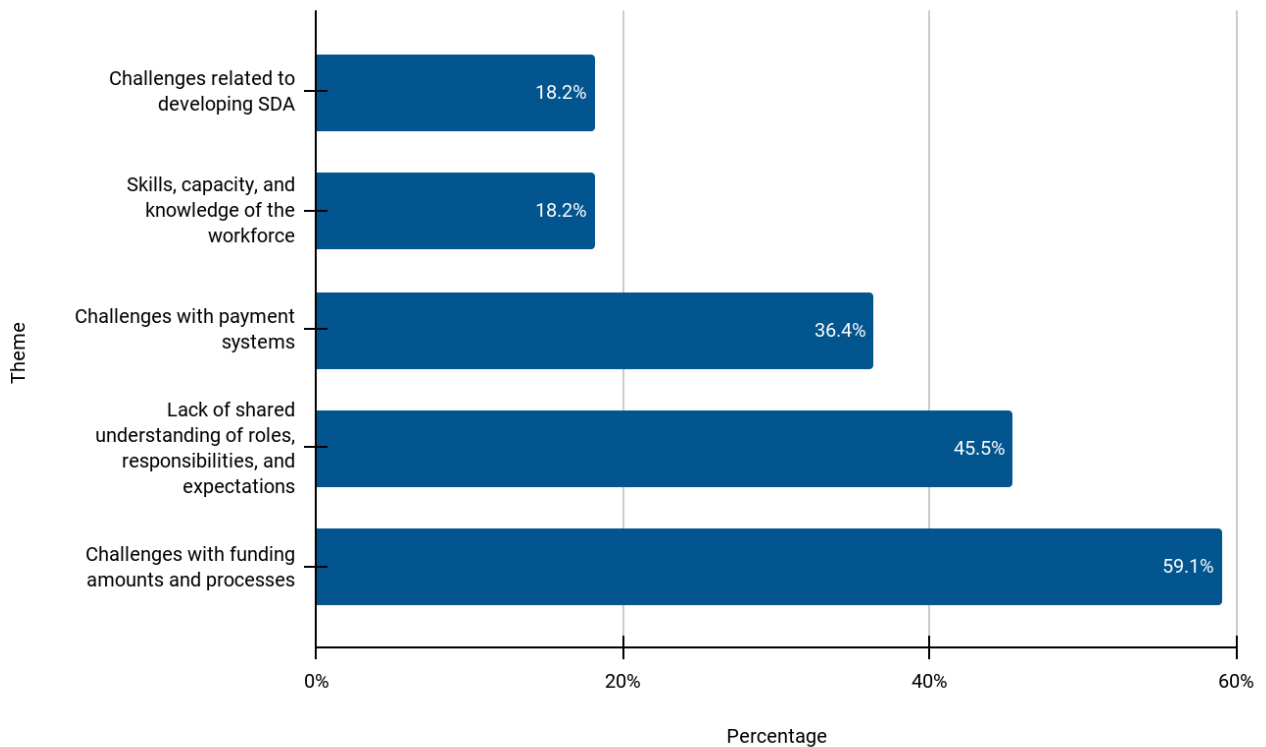
- 1 = Not challenging
- 2 = Slightly challenging
- 3 = Somewhat challenging
- 4 = Moderately challenging
- 5 = Extremely challenging.

Other challenges

In an open-ended question, respondents were given the opportunity to comment on additional challenging aspects of the SDA market. A thematic analysis (see methods for further details) identified five overarching themes from the 22 providers who answered this question. Providers were asked to categorise their responses as “Slightly challenging”, “Somewhat challenging”, “Moderately challenging”, or “Extremely challenging”. In the upcoming analyses, each of the five themes have been discussed individually and broken down by challenge sentiment. Key quotes have been provided alongside the analysis of each theme to illustrate provider’s perspectives, experiences, and opinions in their own words.

Figure 13 shows the five themes derived from grouping comments provided by respondents. ‘Challenges with funding amounts and processes’ was the most common theme (59.1%), followed closely by the ‘Lack of shared understanding of roles, responsibilities and expectations’ (45.5%).

Figure 13 – Themes identified from reported ‘Other challenges’ (n = 22 providers)



Note: A response from a provider could align with more than 1 theme, therefore percentages add to more than 100%.

Theme 1. 'Challenges with funding amounts and processes'

The first identified theme was 'Challenges with funding amounts and processes' which as previously highlighted, was the most commonly identified theme (59.1%). This theme captured issues such as insufficient funding, lack of understanding as to how SDA and support funding works, as well as problems with plan reviews and appeals. Within this theme, providers voiced frustrations surrounding annual SDA funding reviews for participants with lifelong disabilities. The resourcing commitment required from multiple personnel to provide what should be enduring evidence has been quoted to cause strain during cyclical plan reviews and results in wasted time and money.

Providers also expressed concerns about the increasing cost of land and construction, which is not reflected in SDA payment increases. Concerns were raised about balancing value for money whilst maintaining design integrity and tenant outcomes. There was mention of the SDA pricing structure inadequately covering planning and development costs for custom builds, as well as for robust dwellings. Further, some participants receive less SDA funding than what they require, leading to unmet needs, or the provider taking a financial hit to provide housing to the participant. As displayed in Figure 14, 66.7% of respondents who provided responses relating to this theme, found that the theme was "Extremely challenging". Some related quotes are provided below.

"Clients are being assessed for less and less SDA and therefore aren't having needs met as they have to go to a house that is a lower category or the SDA provider takes the financial hit to accept the participant."

"Massive increases in cost of land and construction have not been reflected in SDA increases. This is the main challenge."

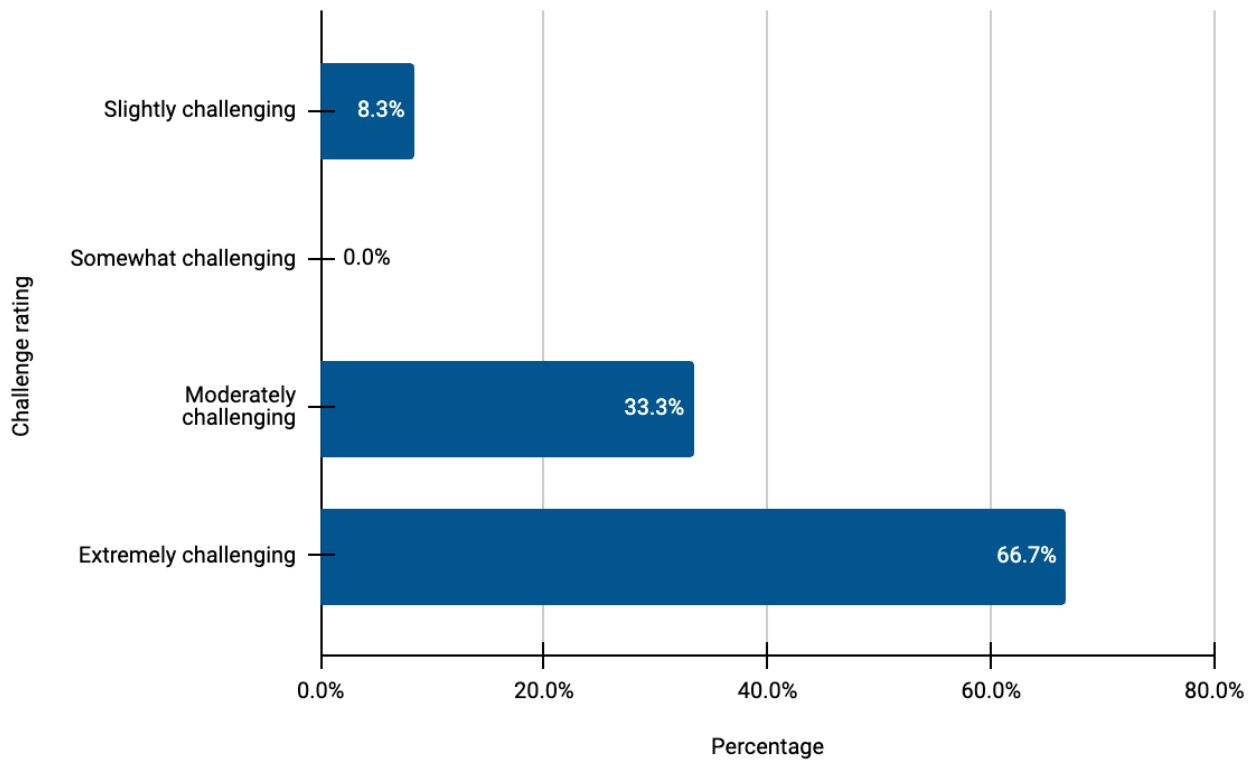
"Despite residents/participants being assessed and approved for SDA funding for more than 4 years now, each yearly plan review requires reconfirmation of the participants' disabilities."

– SDA Providers

It is noted that since the survey was conducted in May 2023, the scheduled five yearly review of SDA pricing has been completed and published by the NDIA, which may address some of the concerns raised by providers.⁴⁸

⁴⁸ NDIA (2023). *Specialist Disability Accommodation Pricing Review 2022-23 - Final report*. National Disability Insurance Agency. <https://www.ndis.gov.au/providers/housing-and-living-supports-and-services/specialist-disability-accommodation/sda-pricing-and-payments/sda-pricing-review>

Figure 14 – Challenges with funding amounts and processes (*n* = 12 providers)



Note: A response from a provider could align with more than 1 theme, therefore percentages may add to more than 100%.

Theme 2. ‘Lack of shared understanding of roles, responsibilities, and expectations’

The second most commonly identified theme was ‘Lack of shared understanding of roles, responsibilities, and expectations’ (45.5%). This theme covered challenges with establishing clear roles and responsibilities of different providers and stakeholders, such as communicating the roles of different providers to a tenant and establishing boundaries on how support providers should treat a tenant’s home. Multiple providers also reported that communication between participants, close others, and stakeholders was challenging, and that SDA providers sometimes needed to get involved as a mediator in conflicts. In addition, it was expressed that stakeholders may have differing expectations of the SDA market. For example, support coordinators, support providers, and investors may have unrealistic expectations, not fully understanding the time and cost it takes to build properties and the likely financial returns from investing in the SDA market. Some providers voiced that it can be difficult working within the SDA market while balancing the expectations of private investors who may have limited industry experience or understanding of the SDA housing market.

Figure 15 shows that the majority of responses related to this theme were rated as “Moderately challenging” (44.4%). See related quotes below.

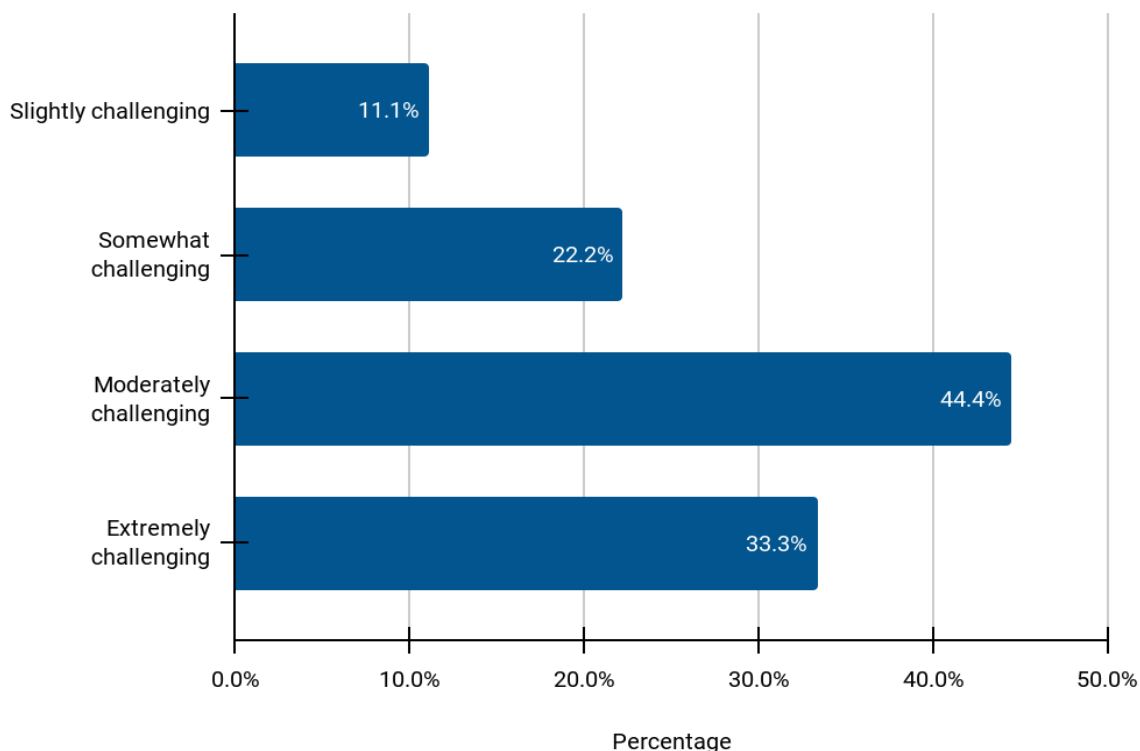
“Having to get involved as a mediator between participants and SIL.”

“Coordinating a shared understanding of the home and associated support systems to the large informal and formal networks for the tenant/participant.”

“Meeting expectations of private investors who have not educated themselves on the reality of investing in this space.”

– SDA Providers

Figure 15 – Lack of shared understanding of roles, responsibilities and expectations (n = 9 providers)



Note: A response from a provider could align with more than 1 theme, therefore percentages may add to more than 100%.

Theme 3. 'Challenges with payment systems'

The theme with the third most responses (36.4%) was 'Challenges with payment systems' which covered issues such as service bookings not being indexed appropriately, challenges with creating service bookings, and problems with plan reviews, incorrect payments, and the appeals process. Providers noted the frustration associated with SDA funding being reduced post-plan review without notification or justification. SDA bookings were said to not have been made despite available funds or would expire without notice. Furthermore, claiming back pay and rectifying payment errors is a lengthy and complex process. Some providers shared their experience of financial strain due to being unable to claim or receive payment for their dwellings while participants were in the process of going through tribunal whilst occupying the dwelling. Most responses (87.5%) related to this theme were rated as "Extremely challenging" (see Figure 16).

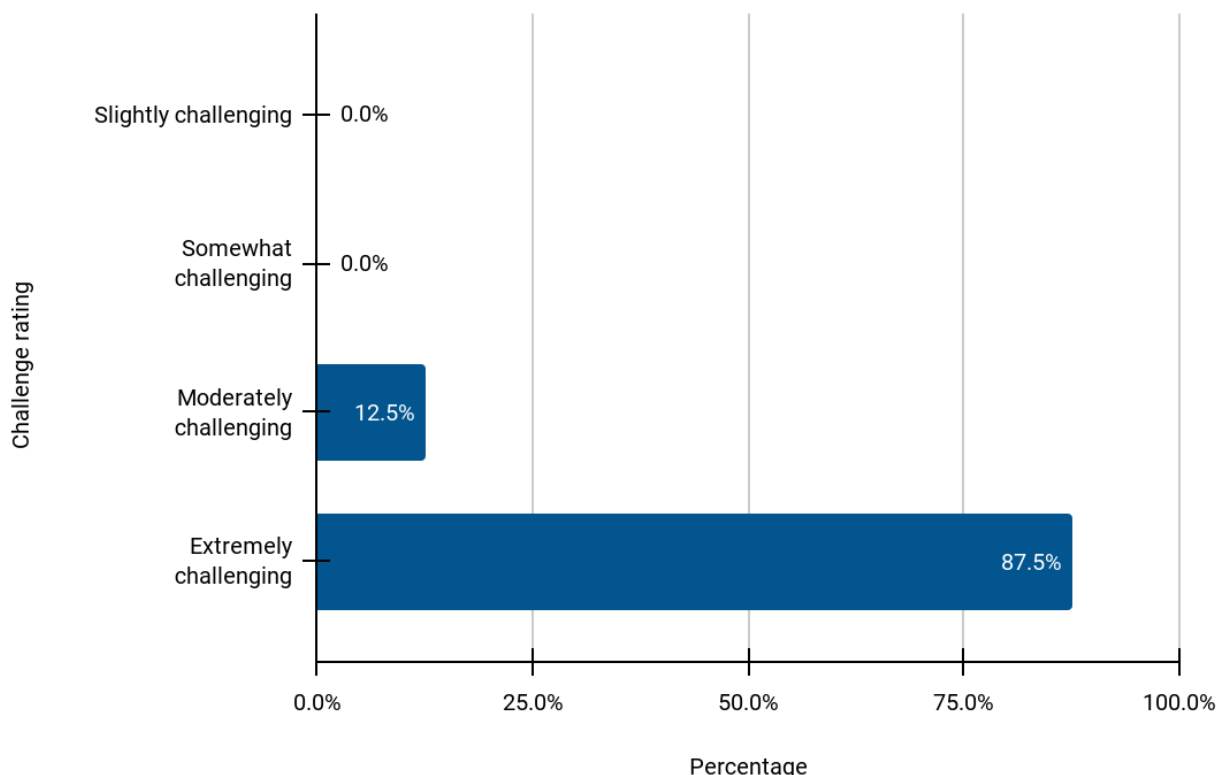
"Reduction in SDA funding on plan review without notification or justification."

"Claiming back pay and payments in error (through the provider portal)... is an extremely long and painful process. The portal does not provide enough information to claim correctly in the first place resulting in claiming errors and onerous admin relating to fixing errors."

"Not advised of NDIS Plan reviews, hence SDA Service Booking expiring without notice. Inconsistent advice from the NDIA payment team saying that SDA Providers can create their own service bookings - WHEN THEY CAN'T!"

– SDA Providers

Figure 16 – Challenges with payment systems (n = 8 providers)



Note: A response from a provider could align with more than 1 theme, therefore percentages may add to more than 100%.

Theme 4. 'Skills, capacity, and knowledge of workforce'

The fourth theme identified by 18.2% of responses was 'Skills, capacity, and knowledge of workforce' which covered issues such as skills of those involved in developing SDA, level of knowledge among planners, the need for upskilling those working in the industry, and difficulties accessing relevant and skilled NDIA personnel. In the experience of some providers, NDIS planners and support coordinators can lack the necessary knowledge to effectively address the needs of participants, such as not advising participants of new property opportunities. Respondents also noted a need for upskilling professionals involved in designing and delivering SDA, such as builders, consultants and contractors. Further, the absence of a single dedicated SDA contact or team in the NDIA and long wait times to speak with relevant NDIA personnel creates significant challenges for some providers. Lastly, some providers felt that the NDIA does not adequately address instances of poor service from SDA and support providers.

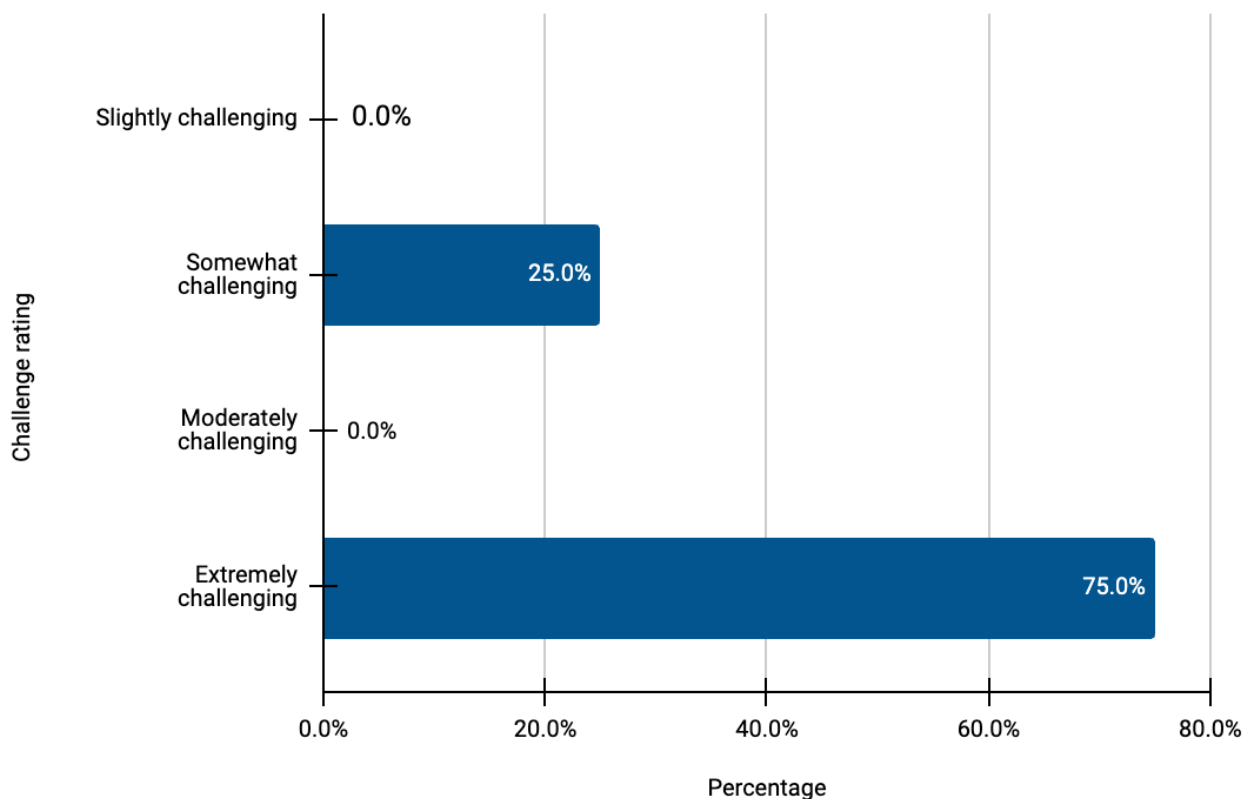
As displayed in Figure 17, issues relating to 'Skills, capacity and knowledge of the workforce' were rated "Extremely challenging" by 75.0% of respondents (see below for related quotes).

"Still don't have an SDA contact after 3 years of trying. Long wait times to speak with relevant people at NDIS."

"Clients are forced to battle their way through with Support Coordinators who still seem to be poorly educated on the SDA process."

– SDA Providers

Figure 17 – Skills capacity and knowledge of the workforce (n = 4 providers)



Note: A response from a provider could align with more than 1 theme, therefore percentages may add to more than 100%.

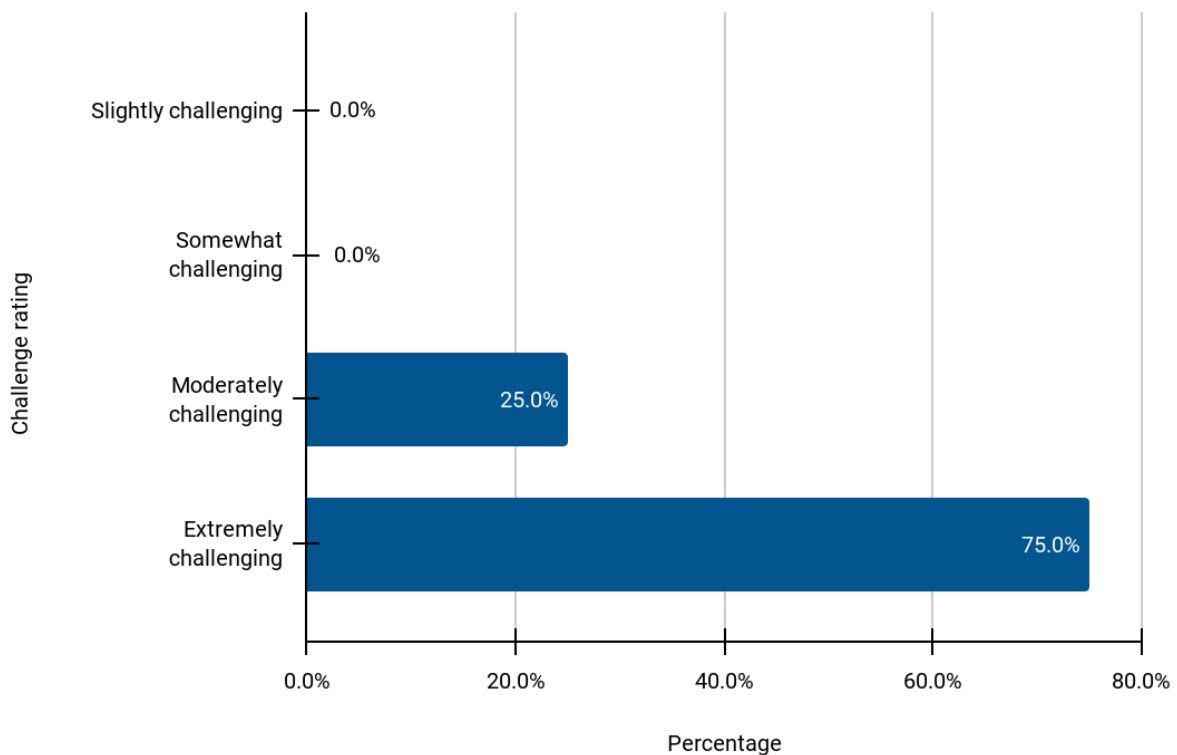
Theme 5. 'Challenges related to developing SDA'

Lastly, the fifth theme identified by 18.2% of responses was 'Challenges related to developing SDA' where respondents generally felt that issues relating to this theme were "Extremely challenging" (see Figure 18). This theme covered problems relating to the development of multi dwelling SDA, enrollment portal issues, and the lack of clear supply and demand information from the NDIA. The general consensus among providers was that supply and demand information provided by the NDIA is often lacking detail and transparency. Moreover, the NDIA was perceived to not be transparent about developments that are underway that may address unmet demand upon completion, which impacts providers' ability and confidence to develop SDA. Lastly, within this theme, some providers expressed the difficulty in accommodating participant's requests to modify their dwelling when the cost of the modification is not included in SDA funding amounts.

"Clarity and security of tenant demand/supply information to assist in making strategic decisions."

- SDA Providers

Figure 18 – Challenges related to developing SDA (n = 4 providers)



Note: A response from a provider could align with more than 1 theme, therefore percentages may add to more than 100%

Financial risks

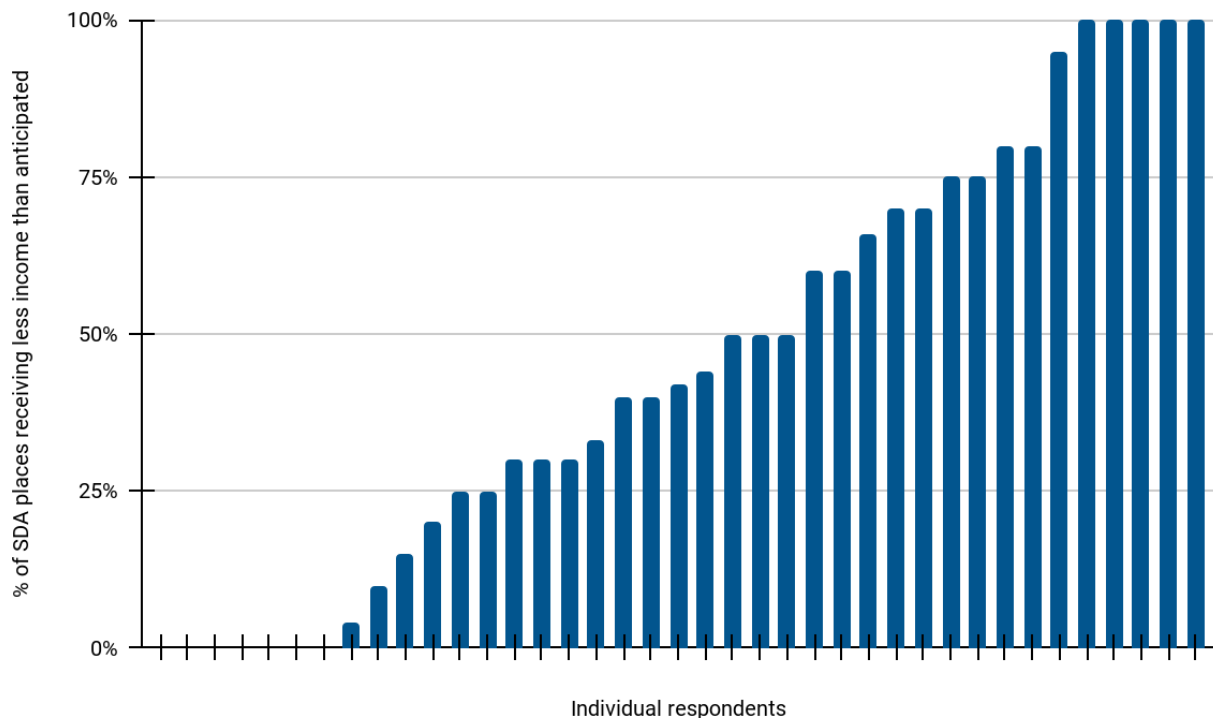
The survey asked respondents to reflect on financial risks in the market, including the SDA income they receive and overdue payments by the NDIA. These questions were answered by almost all respondents ($n = 39$).

SDA income

Respondents were asked to indicate what percentage of their New Build SDA places are receiving a lower rate of SDA payments than the dwelling was enrolled for (see Figure 19). Most providers in our sample (78.0%) indicated that they are receiving less than the anticipated income for at least some of their new SDA, which is a notably higher percentage compared to 56.8% and 60.7% of providers in 2021 and 2022, respectively. Among these providers, the percentage of SDA places receiving less than anticipated income varied greatly. As can be seen in Figure 19, 18 providers reported that 50% or more of their New Build SDA places received less than the anticipated income, while 5 providers reported that 100% of their new SDA places are receiving a lower rate of SDA payments than what the dwelling was enrolled for. Only 7 respondents (17.9%) reported that none of their new SDA places received less than anticipated income.

Across all respondents, the median percentage of SDA places receiving less than the anticipated income was 42.0%, which has increased compared to the 2022 survey findings where the median percentage reported was 33.0%.

Figure 19 – Percentage of New Build SDA places receiving less than anticipated income ($n = 39$ providers)



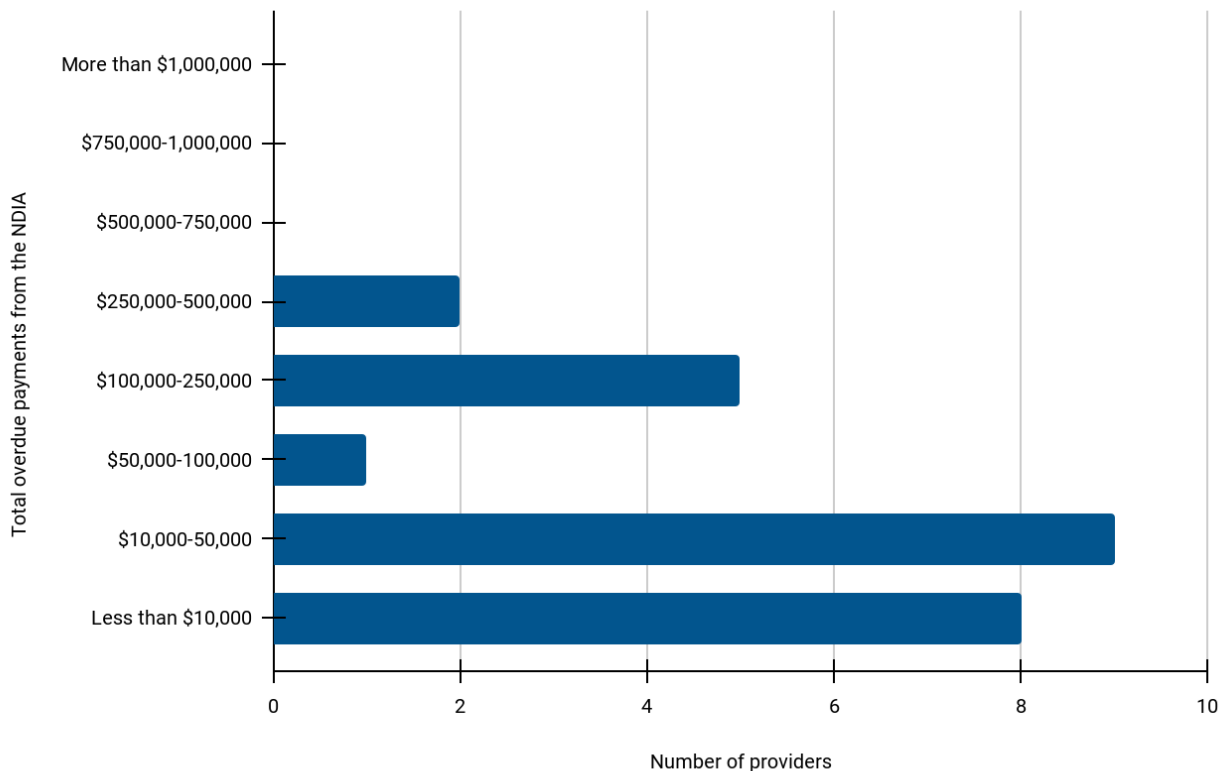
Note: Each bar represents the percentage of New Build SDA places reported by 1 respondent.

Overdue payments from the NDIA

The majority of respondents (65.0%, $n = 26$) reported that they were owed SDA payments from the NDIA (compared to 66.7% and 44.4% of providers who reported being owed payments in 2022 and 2021, respectively). Of the 26 providers who indicated they were owed money in the current survey, 25 providers reported the total amount overdue (see Figure 20).

Concerningly, there was a total of \$1,911,784.68 overdue by the NDIA. Of the providers with overdue payments, 32.0% reported having overdue payments of less than \$10,000, while 28.0% reported that they had overdue payments of more than \$100,000. The lowest amount of overdue payments owed to a single provider was \$1,621, while the highest amount was \$500,000. The median total of overdue payments across all providers was \$26,500.

Figure 20 – Number of respondents indicating the total amount of overdue payments from the NDIA ($n = 25$ providers)

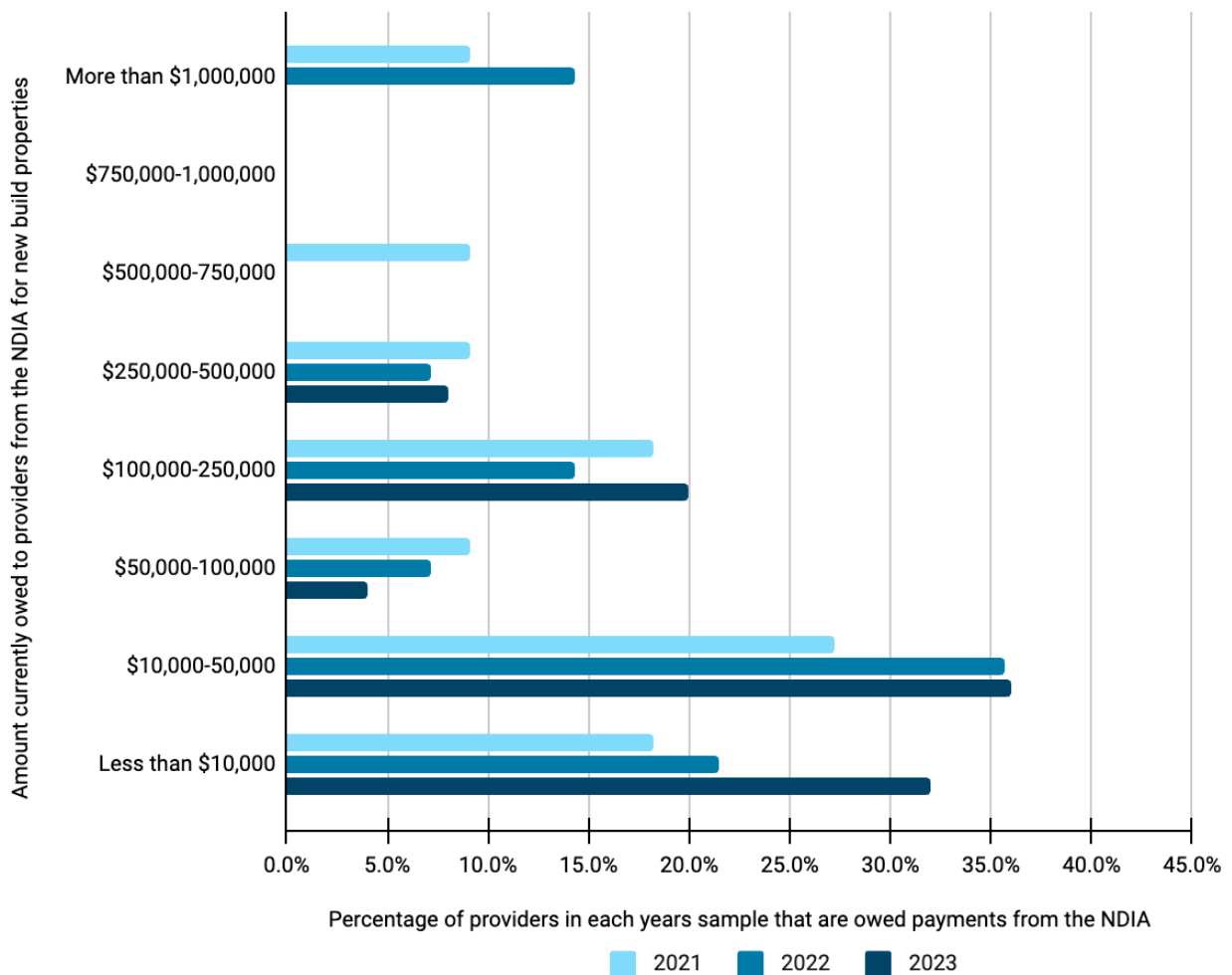


Note: One provider who selected that they had money owing to them was excluded in this analysis as they did not provide numeric values as to what they were owed. One provider reported that they were owed a total of \$500,000 - to use a conservative approach this provider's response was categorised into the '\$250,000 - \$500,000' amount bracket. This was the only instance where the amount owed to a provider crossed over into 2 categories.

Changes in overdue payments by the NDIA between 2021, 2022 and 2023

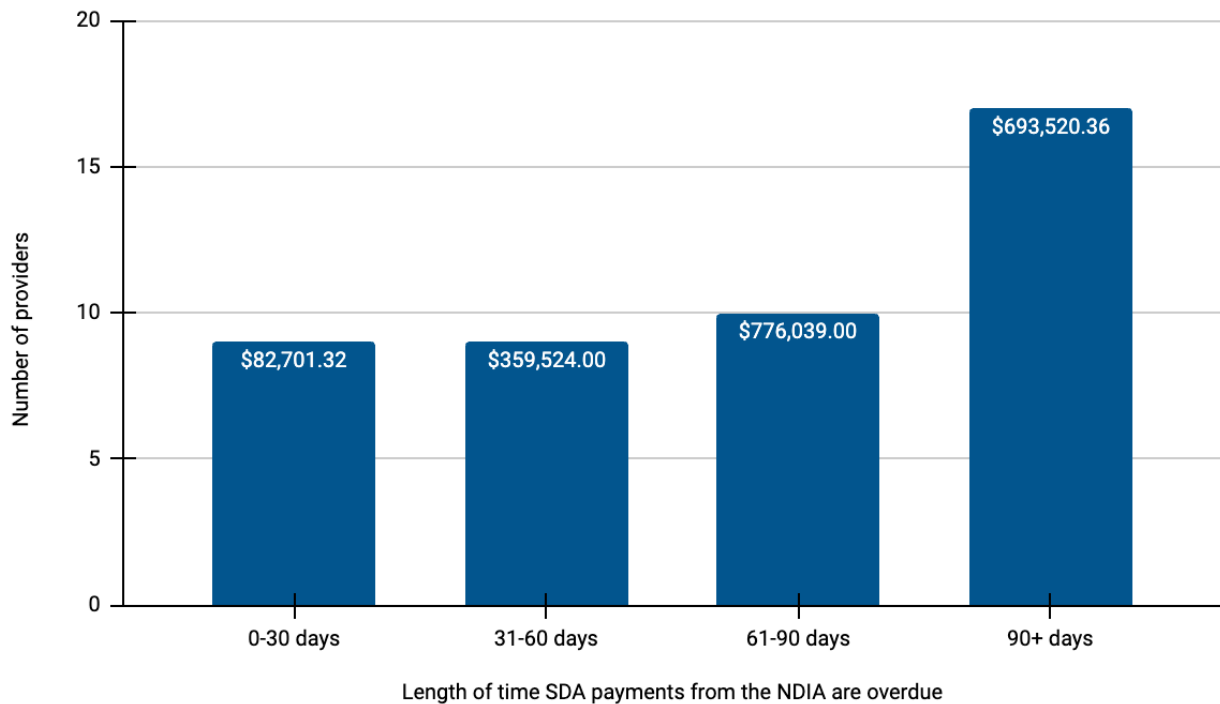
The percentage of providers indicating the total amount of overdue payments from the NDIA for New Build properties was compared across 2021, 2022, and 2023. As can be seen in Figure 21, there has been an increase in the percentage of providers who had overdue payments of '\$10,000 - \$50,000' compared to 2021, and an increase in the percentage of providers who had overdue payments of 'less than \$10,000' compared to 2021 and 2022. Fortunately, for the first time across the three years the SDA Provider Experience Survey has been run, no providers in the 2023 survey had overdue payments of more than \$500,000. Although this is a positive finding, it is important to bear in mind the total sum of \$1,911,784.68 that remains overdue to the 25 providers.

Figure 21 – Percentage of providers indicating the total amount of overdue payments from the NDIA across the years 2021, 2022, and 2023. (n = 11, 14, 25 providers respectively)



Of the respondents that indicated they were owed SDA payments from the NDIA, 68.0% providers reported they had payments that were overdue by more than 90 days, which amounted to a total of \$693,520.36 owed for this time bracket (see Figure 22). A further \$776,039.00 was 61 to 90 days overdue.

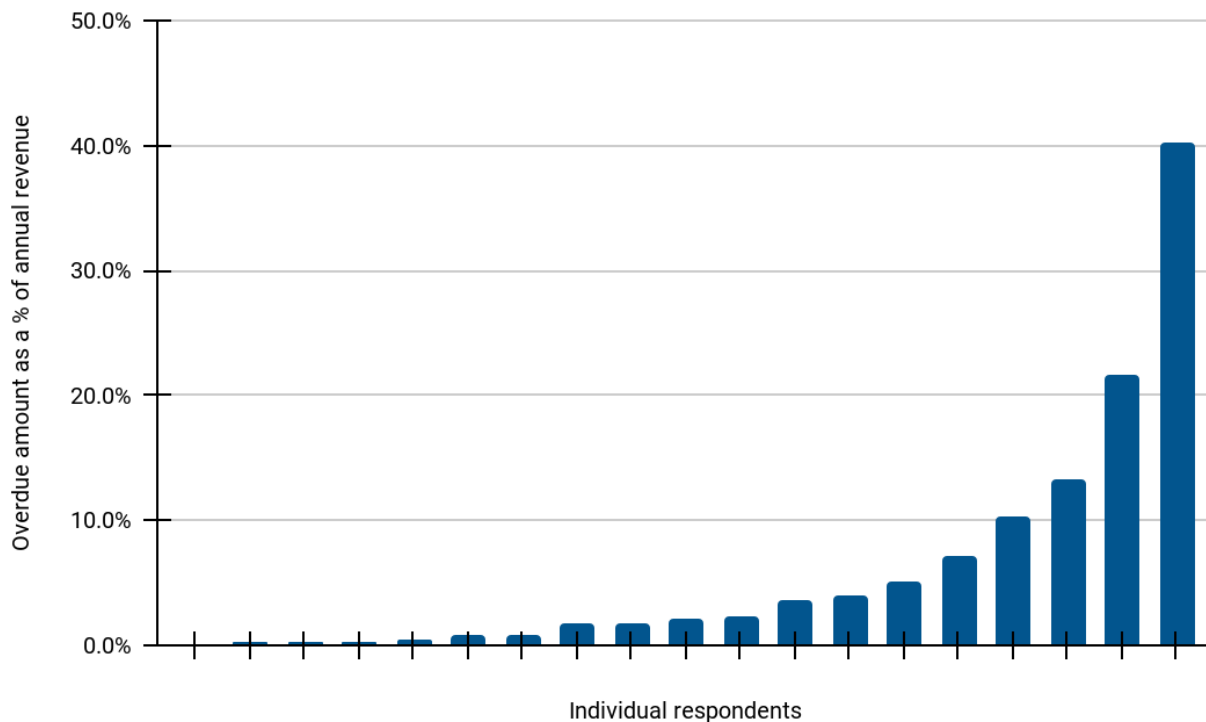
Figure 22 – Number of respondents indicating the length of their overdue SDA payments from the NDIA (n = 25 providers)



Note: Respondents were able to enter a response for multiple time brackets. One provider who selected that they had money owing to them was excluded in this analysis as they did not provide a value as to what they were owed.

Providers reported their total annual revenue for the 2021 - 22 financial year. This can be used to understand the impact of overdue NDIA SDA payments. In total, 19 providers responded to this question, which enabled calculation of the percentage of annual revenue that is currently overdue (see Figure 23). The percentages varied widely between the 19 providers, however, when looking at the median, the overdue payments represented approximately 2.2% of an organisation's total revenue. Concerningly, one provider reported that the overdue amounts they are owed by the NDIA represent 40.2% of their total annual revenue, and further, this provider's payments have been overdue for more than 90 days.

Figure 23 – Amount overdue from the NDIA as a percentage of the organisation's annual revenue (n = 19 providers)



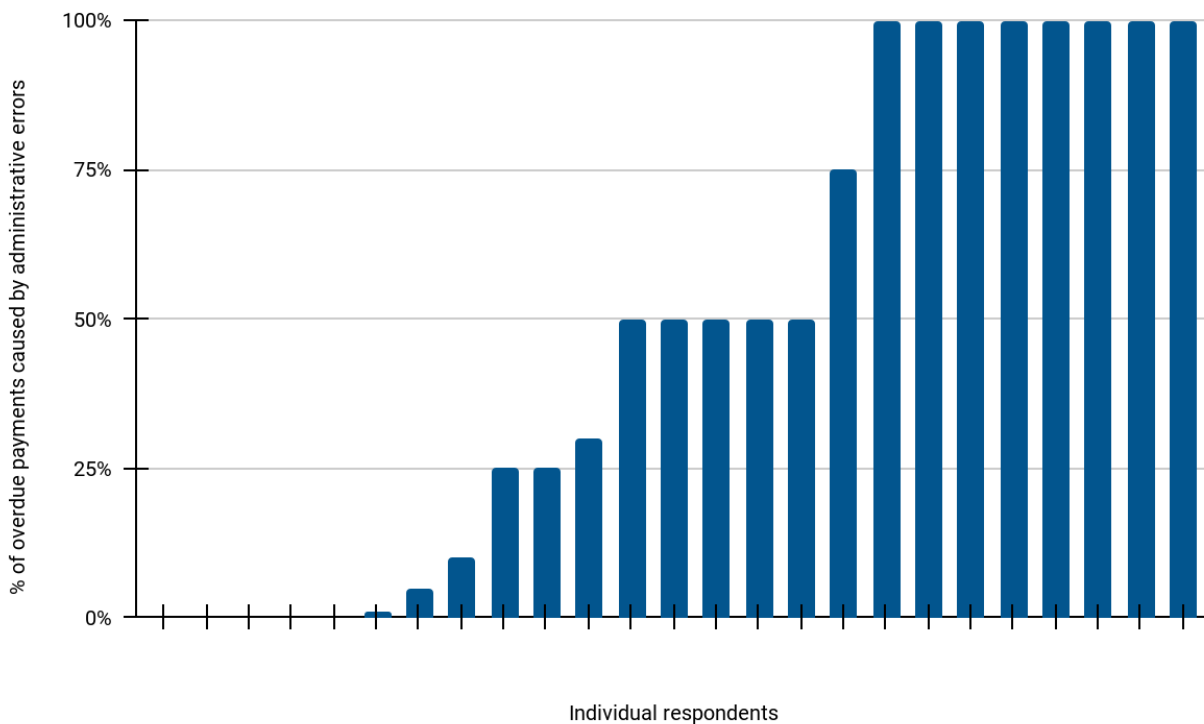
Note: Each bar represents 1 respondent.

Reasons for overdue payments

Respondents were asked what percentage of their overdue payments were due to NDIA administrative errors (i.e., the NDIA not paying the right rate) and slow administration by the NDIA (i.e., the NDIA processing applications and requests slowly). In total, 25 respondents answered these two questions. Please note that seven providers reported percentages that summed to more than 100% across these two questions, therefore, there is some overlap in the percentages and dollar amounts that are reported in the below two paragraphs.

Out of the 25 providers who answered this question, 20 respondents (80.0%) felt that overdue payments for New Build SDA were, at least in part, due to NDIA administrative errors (see Figure 24). Moreover, more than half (56.0%) of respondents indicated that at least 50% of their overdue payments were due to NDIA administrative errors. Concerningly, eight providers reported that 100% of their overdue payments were due to this reason. The median percentage of overdue payments due to NDIA administrative errors was 50%, which is a considerable increase from a median of 10% in 2022. Based on our 2023 sample, the total reported amount of money overdue based on NDIA administrative errors was \$656,079.28.

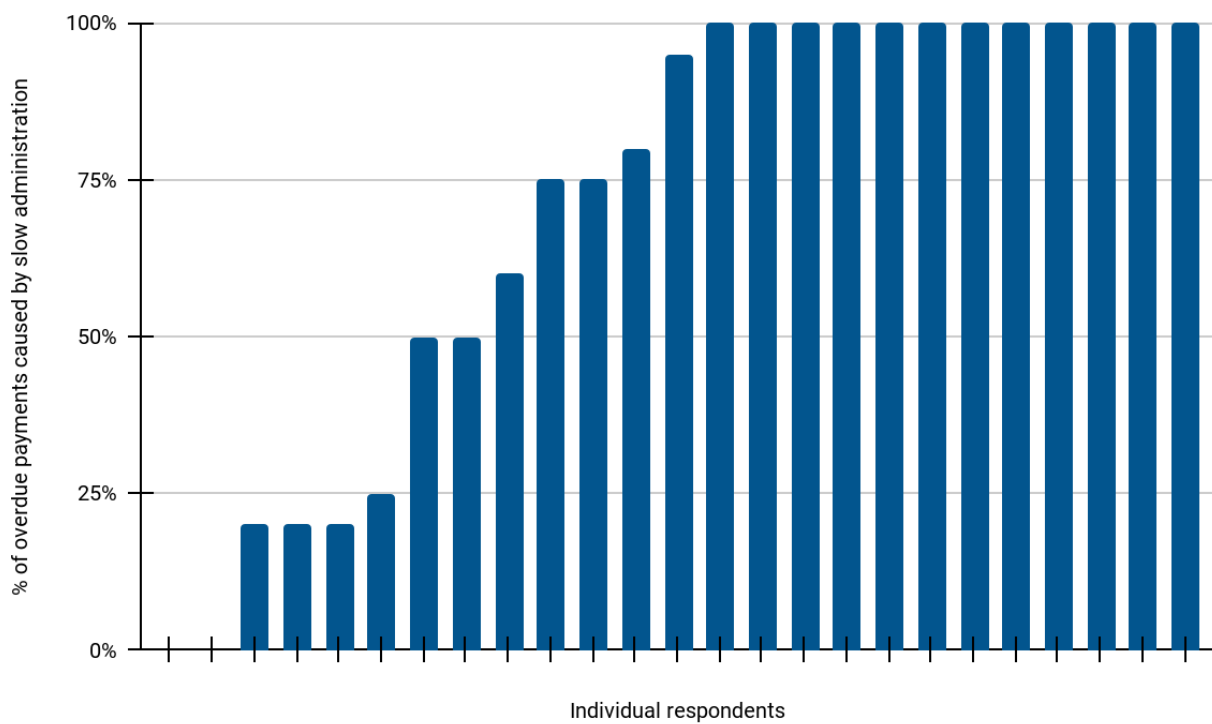
Figure 24 – Percentage of overdue payments that are thought to be due to administrative errors by the NDIA, per provider ($n = 25$ providers)



Note: Each bar represents 1 respondent.

As per Figure 25, out of the 25 respondents who answered this question, 23 respondents (92.0%) reported that slow administration was a cause for their overdue payments for New Build SDA. In comparison to administrative errors, slow administration appeared to have a greater impact on whether SDA payments are received on time. Alarming, 76.0% of providers indicated that at least 50% of their overdue payments were due to this reason. Moreover, there were 12 providers (48.0%) who reported that 100% of their overdue payments were due to this reason. The median percentage of overdue payments thought to be due to slow administration was reported to be 95.0%, which was comparable to our 2022 median of 92.5%, suggesting that slow administration continues to be a predominant reason for overdue payments. The total reported amount of money overdue based on slow administration by the NDIA was \$1,393,876.99.⁴⁹

Figure 25 – Percentage of overdue payments that are thought to be due to slow administration by the NDIA, per provider (n = 25 providers)



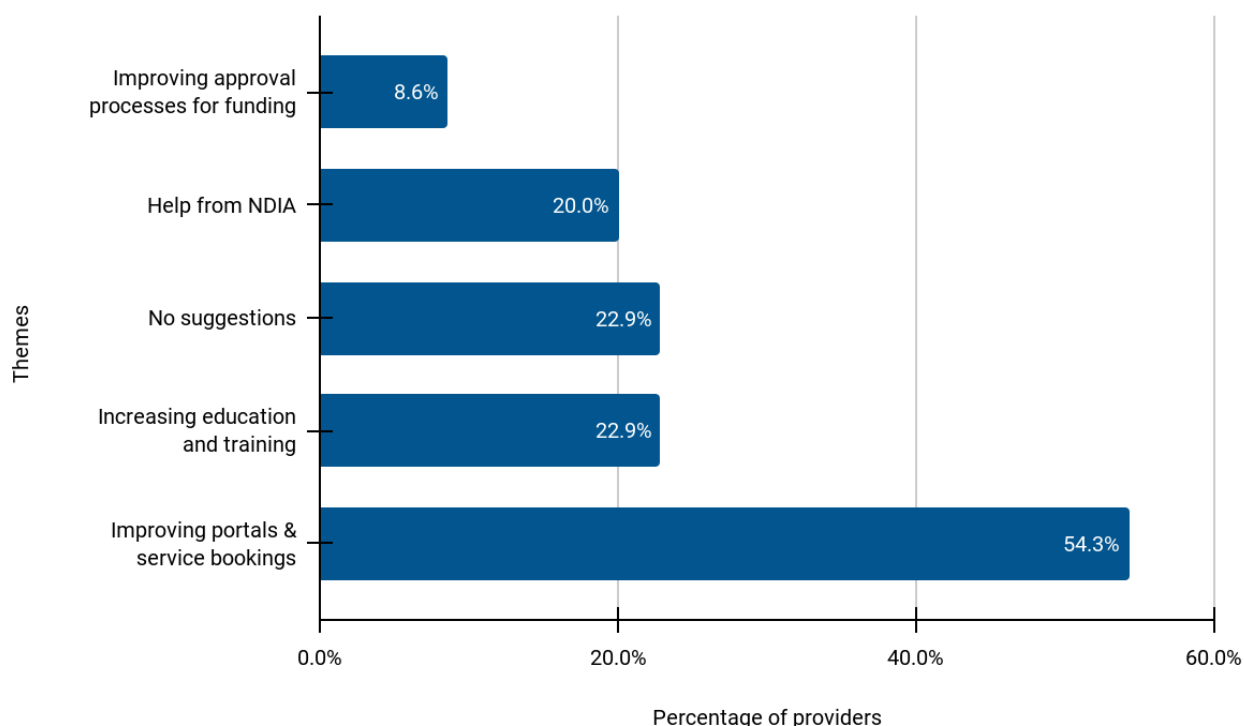
Note: Each bar represents 1 respondent.

⁴⁹ Please note, due to the overlap in responses for 7 respondents, the total for the above two analyses (\$2,049,956.27) is greater than our previously quoted total amount of payments overdue (\$1,911,784.68).

Suggestions from providers on how to improve NDIA systems to ensure timely and accurate SDA payments

SDA providers were asked to make suggestions on how the NDIA could improve their systems to ensure timely and accurate SDA payments. As seen in Figure 26, of the responses of 35 providers, four main themes arose, (1) improving portal and service bookings, (2) increasing education and training, (3) help from the NDIA, and (4) improving approval processes for funding. A number of respondents also provided no suggestions (22.9%).

Figure 26 - Themes identified from suggestions for improving NDIA systems to ensure timely and accurate SDA payments ($n = 35$ providers)



Note: A response from a provider could align with more than 1 theme, therefore percentages add to more than 100%

Theme 1. 'Improving portal and service bookings'

The first theme - improving portal and service bookings - was found to be the most common suggestion to improve NDIA payment systems, reported by 54.3% of providers. It was frequently reported that SDA providers want the option to be able to create and manage their own service bookings. If providers were able to create their own bookings, they stated that this would help the efficiency of the system and avoid service bookings ending 'prematurely' and consequently being re-entered for the wrong amount. Another recurring idea was separating SDA from participants' overall NDIS plan, in order for their SDA funding to automatically rollover when it does not need to be reviewed during a plan review. This also closely aligns with suggestions that service bookings should be eliminated altogether, or that a service booking should only need to be made once a participant's circumstances have changed.

Some other reported ideas were improving the portal functionality to minimise website glitches, providing clearer guidelines and processes for how to create service bookings and payments, having a

history of the clients SDA plans available on the portal, and being able to access more client information on the portal (e.g., funding availability).

“SDA should be treated separately from the participant's overall plan. The SDA service booking should only need to be made once a year or when circumstances change.”

“SDA should be brought in line with other NDIS services, and providers should be able to create their own service bookings to ensure timely SDA payments. Service bookings should be live, and when they are no longer valid due to a new plan, funds should no longer be able to be claimed.”

– SDA Providers

Theme 2. ‘Increasing education and training’

The second theme relating to improving the NDIA systems was to increase education and training of staff (22.9%). By staff, the respondents were referring to people who work for the NDIA (i.e., planners) or external support coordinators, as these were often cited to be the individuals who help create service bookings for the participant. It was noted that these staff members need more education and training regarding general SDA processes, key requirements of service bookings, and the different types of SDA available in relation to a client's funding. This theme also included being able to improve the communication gap between SDA providers and NDIA planners. It was reported that SDA providers were often left out from the planning process, despite being vital and knowledgeable in the overall SDA process for a participant.

“Ensure planners are aware of the process to implement a service booking for people transitioning into SDA accommodation. It is often overlooked and we are generally excluded from the planning process despite our key role.”

“Build a framework for education and professional development for professionals in this space, it will reduce irresponsible spending and inconsistent decisions and see better outcomes for participants.”

– SDA Providers

Theme 3. ‘Help from the NDIA’

The third theme explored receiving help from the NDIA (20.0%). The providers reported that they are seeking more assistance from the NDIA team regarding their current systems, payment issues, and general query resolutions. It was stated that the NDIA is quick to close queries without adequate investigation and that it is difficult to get in contact with the NDIA. To counter this, it was suggested to have a well-informed team dedicated for SDA enquiries. By providing a single point of contact responsible for different domains, it was stated that this would help improve the consistency of support and services provided by the NDIA.

Within this theme, it was also reported that providers wanted to see more accountability from the NDIA and efficiency in resolving issues. The lack of accountability can often lead to unresolved problems circling around for months and bottlenecking the process of approvals.

“Consistent contact team in the NDIS to discuss SDA - they need to be skilled in understanding how the SDA part of the scheme operates.”

“Unable to contact anyone on the payments team and no one to provide advice on how everything works - it is trial and error a lot of the time.”

– SDA Providers

Theme 4. ‘Improving approval processes for fundings’

In the final theme, some respondents reported a need for improving the approval processes for fundings (8.6%). This referred to reducing the complexity of annual funding reviews to be less time-consuming and minimising the amount of evidence needed. This also included improving the decision-making process around approvals and ensuring the participant is funded for the right amount so providers are not forced to accept a lower funding category instead.

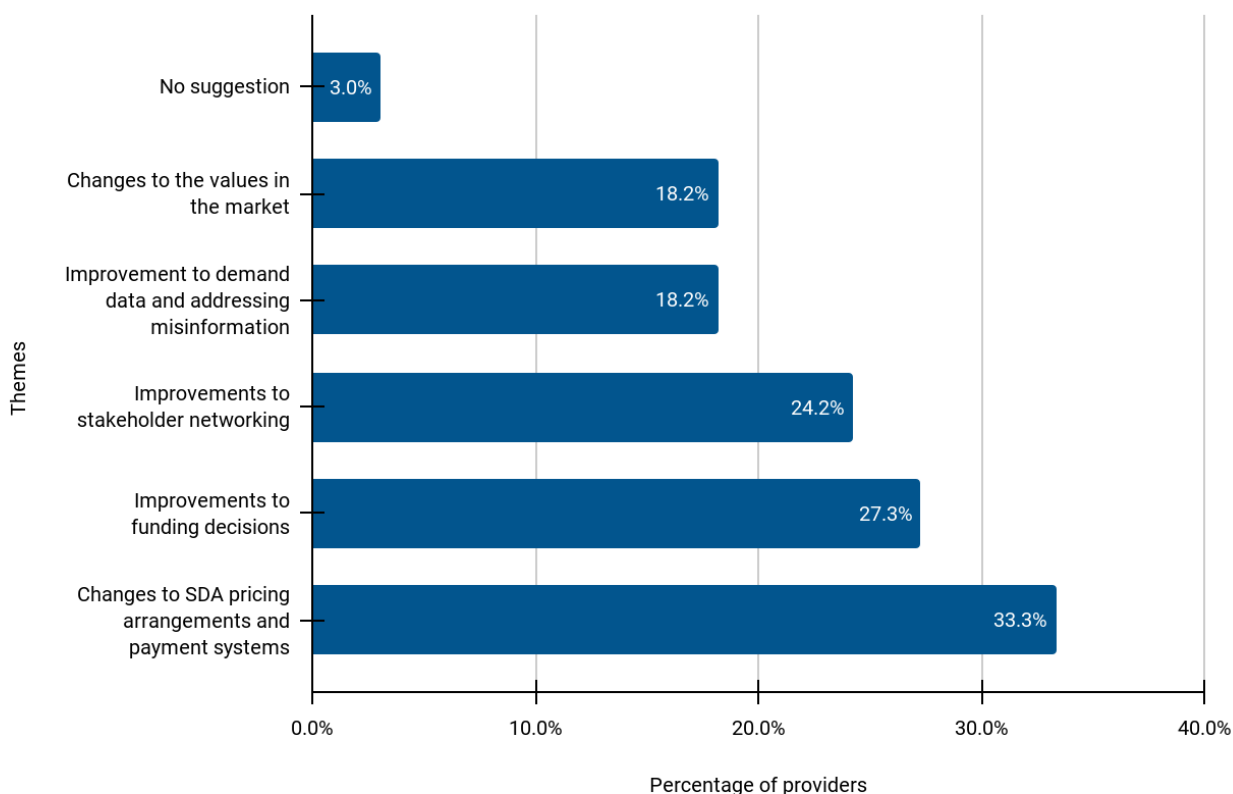
“Make annual funding Plan reviews less arduous, and time consuming and therapist engagement, particularly if no change from previous year.”

– SDA Provider

Changes to the SDA market

When asked to suggest a change to the SDA market, 35 providers responded. The responses of 2 providers could not be allocated to any theme, leaving a sample of 33 respondents. Among these, 5 themes emerged (see Figure 27): (1) Changes to SDA pricing arrangements and payments systems, (2) Improvements to funding decisions, (3) Improvement to demand data and addressing misinformation, (4) Improvements to stakeholder networking, and (5) Changes to the values in the market. One provider (3.0%) indicated they had no suggestions.

Figure 27 – Themes identified from suggested changes to the SDA market ($n = 33$ providers)



Note: A response from a provider could align with more than 1 theme, therefore percentages add to more than 100%

Theme 1. 'Changes to SDA pricing arrangements and payments systems'

The first theme (33.3%) identified proposed changes to payment systems, predominantly improvements to service bookings. Further, respondents suggested changes to the SDA pricing arrangements, which included changes to funding amounts (such as increasing SDA funding to reflect the inflation of current building and land costs) as well as more systematic changes to the pricing arrangements. For example, providers suggested expanding the building configurations that are funded, such as adding independent living options for Houses and Robust dwellings, as well as changing the way participants' funding is matched to properties, as illustrated by the following quotes:

"Participants who are found eligible for a category of SDA (IL, FA etc.) can then elect to move-into the available SDA they choose (1bed Villa, 3bed house & location etc). And the SDA

provider would be paid per the Price Guide for that dwelling. ie. as was implied by the publication of the price guide.”

“Completely overhaul Robust space, from pricing to builds. The majority of Robust participants require single occupancy, when there's not even a price line item for a single occupancy house.”

– SDA Providers

It is noted that since the survey was conducted in May 2023, the scheduled five yearly review of SDA pricing has been completed and published by the NDIA, which may address some of the concerns raised by providers.⁵⁰

Theme 2. ‘Improvements to funding decisions’

The second theme identified was improvements to funding decisions (27.3%), which emerged from suggestions by providers that the decision-making on SDA funding should be faster, consistent, easier, and aligned with the evidence provided. It was also suggested that the availability of suitable properties should be taken into account when the NDIA makes funding decisions.

“NDIS would factor SDA housing availability into participant funding decisions, so SDA providers have more success matching new build dwellings to funding amounts.”

“Speedy processing and common sense SDA Panel results. If a person is using a hoist automatically they are HPS, in a manual wheelchair automatically FA at least and speed these things up.”

– SDA Providers

Theme 3. ‘Improvements to stakeholder networking’

The third theme identified was improvements to stakeholder networking (24.2%). Respondents suggested that better collaboration between professionals within the sector is needed, such as with support coordinators, support providers, hospitals, and the aged care system. A platform enabling the sharing of information between these stakeholders could be beneficial. One respondent highlighted that governments could work with SDA providers to enable tenants living in Legacy stock to find more appropriate housing. The theme also included improved collaboration with the NDIA, with providers stating they need a direct contact to a dedicated team skilled and educated about SDA.

“Have a dedicated team within the NDIA that's sole function is to follow up SDA provider issues.”

“Having a NDIS liaison line that SDA providers can contact to have issues resolved. At present NDIS hide behind emails and can not be contacted, they have to contact you and if you miss their call it's too bad.”

“Different govt departments can work with the SDA providers in dealing with the housing crisis for people with disability. Departments have people living in the legacy stock (houses). If they

⁵⁰ NDIA (2023). *Specialist Disability Accommodation Pricing Review 2022-23 - Final report*. National Disability Insurance Agency. <https://www.ndis.gov.au/providers/housing-and-living-supports-and-services/specialist-disability-accommodation/sda-pricing-and-payments/sda-pricing-review>

roll out a strategy to move them to the new properties that will create a controlled demand for properties i.e less vacancies.”

– SDA Providers

Theme 4. ‘Improvement to demand data and addressing misinformation’

The fourth theme identified was to improve access to demand data and to address misinformation (18.2%). Respondents noted needing better access to accurate data about potential tenants, including their funding levels, location, preferences and needs. This would facilitate long-term planning and reduce vacancy risks by helping providers build properties that meet participants’ needs.

This theme also emerged from reports that spruikers are spreading inaccurate or misleading information about the nature of SDA and the revenue produced by an investment in SDA. An investigation or regulatory body was suggested to help address this misinformation in the market.

“Better facilitation in long-term planning for housing for both providers and participants/tenants to improve security and stability for both parties. This could be done by access to a ‘list/pool’ of prospective tenants with detailed information about their eligibility, needs and preferences to allow for design, planning, matching of potential tenants and security.”

“...An investigation or regulatory body needs to be set up or completed, targeting marketing companies that are sprucing SDA development and misleading and miseducating the public around the financial benefits of SDA development. Hundreds of homes and millions of dollars are being spent building SDA homes in areas of zero demand, and that have zero services that are able to operate in those locations. Once again, this is dramatically impacting the sectors ability to attract private investment in the disability housings market.”

– SDA Providers

Theme 5. ‘Changes to the values in the market’

Lastly, some respondents (18.2%) indicated they would like to see a change in values in the market - the predominant focus should be on participants. This included investors needing to be more value driven, the NDIA focusing on the participants rather than regulatory requirements, and providers, such as support providers, being prevented from holding onto tenants if the property is not the best fit to the tenants’ needs and preferences.

“Stop providers allowing participants to stay in inappropriate accommodation and support them to seek built-for-purpose accommodation.”

“Referral process from SIL- SIL hold onto people (keeping them in unsuitable housing) rather than referring to get the best participant outcomes (they want an empty house for one person, when there might be 5 houses with vacancies the participant would match, with other SILs) too much competition and not enough focus on positive outcomes for people. When someone comes directly to the SDA, a much more tailored approach can happen (if the SDA is disability focus not real estate focused).”

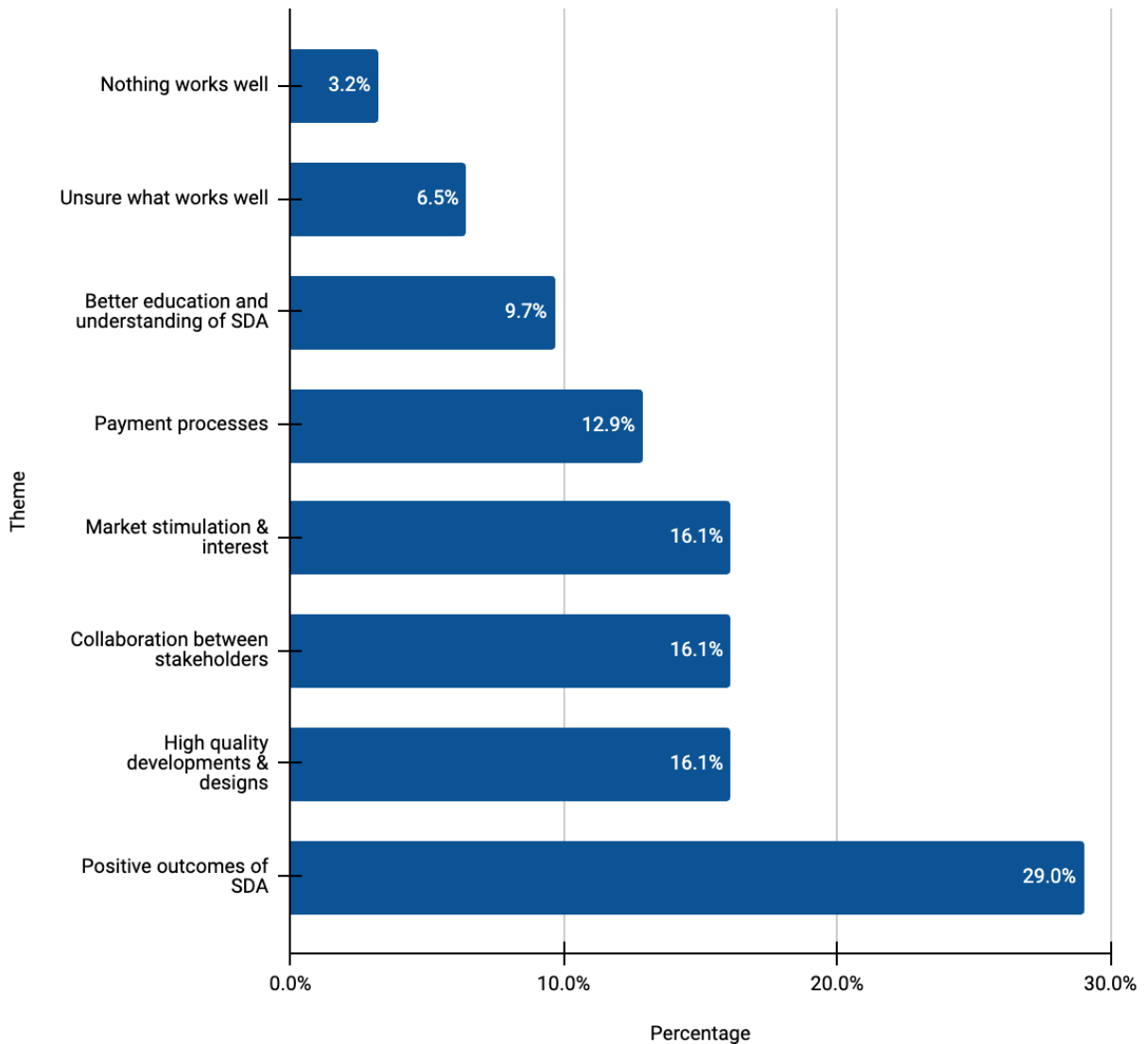
“Make it about the participant, not the regulatory requirements.”

– SDA Providers

Current strengths of the SDA market

SDA providers were asked to state what is currently working well within the SDA market. From the responses of 31 providers, six broad themes emerged, (1) positive outcomes of SDA, (2) collaboration between stakeholders, (3) market stimulation and interest, (4) high quality developments and designs, (5) payment processes, and (6) better education and understanding of the SDA (see Figure 28). A small number of providers also stated that nothing is working well or that they are unsure of what is working well.

Figure 28 – Themes identified from reported aspects of the SDA market that are currently working well (n = 31 providers)



Note: A response from a provider could align with more than 1 theme, therefore percentages add to more than 100%

Theme 1. Positive outcomes of SDA

The most common response was that the market is doing well to provide positive outcomes for tenants in SDA (29.0%). Many providers stated that the SDA market is helping to improve quality of life, community integration, independent living and general well-being of their SDA tenants. It was also reported that as providers, it felt rewarding to be a part of the life-changing impacts that appropriate housing can have on their tenants. However, it was noted that these positive outcomes are only possible when the SDA providers have the tenants' needs and preferences at the forefront of their mind, the right build is matched appropriately to the tenants, and when the process of acquiring SDA funding comes together smoothly.

“Life changing when the right build is undertaken and compatibility of residents works..”

“The development of appropriate homes for people with disability is brilliant and this is the thing that works well and keeps us fighting the system and challenges to keep delivering builds which enable people to be independent and active in their community”

“The implied impact of SDA in the disability community is well received, and the outcomes that are being generated through SDA living are showing some great results.”

– SDA Providers

Theme 2. Collaboration between stakeholders

The second theme suggests that the active collaboration between stakeholders is working well for the SDA market (16.1%). This refers to the willingness of SDA providers to work together with other providers to share relevant housing information and discuss referrals. Additionally, providers also stated that having open collaboration and communication with investors, support coordinators, and developers was beneficial to the market. Coinciding with the first theme, it was also noted that having this collaboration between stakeholders was also important to help provide positive outcomes for tenants of SDA.

“Many independent providers will work together well and help each other with information and referrals.”

“Collaboration and willingness to share information between providers for good outcomes for participants.”

– SDA Providers

Theme 3. Market stimulation and interest

Thirdly, it was frequently reported that increased market stimulation and interest from investors and developers is working well for the SDA market (16.1%). It was also stated that the commitment from the NDIA to help keep the market active via the SDA price review is beneficial for the market.

Moreover, it was reported that SDA is a pseudo market that enables participants to have more choice over where they live and who they live with. Therefore, the increased market stimulation was also important in contributing to positive outcomes for SDA participants by enabling more autonomy and choice over their housing.

“Having large scale investors stimulate the market has had a positive impact on the sector.”

“There seems to be genuine commitment at the NDIA level to keep the market active (i.e. the SDA price review).”

– SDA Providers

Theme 4. High quality developments and designs

Another common response to what is working well in the SDA market was having consistent high quality developments and design (16.1%). Providers reported that current design standards are straightforward to follow, are fit with up-to-date technology, and minimise the need for future modifications to be made. This theme also referred to having more high-quality housing options being built in popular metropolitan and regional areas as beneficial to increasing the supply of quality housing for participants. Similarly to the aforementioned themes, providers reported having access to high quality developments was important for enabling positive SDA outcomes for tenants. However, providers also stated that there is still room for improvement regarding the overall design standards.

“Opportunities for people with a disability to live in brand new, purpose built homes that are fitted with current technology and in our case highly desirable locations being inner city and suburban areas”

“Design standards have generally been easy to follow and minimise modifications needed for new tenants but there are still improvements to be made.”

– SDA Providers

Theme 5. Payment processes

The fifth theme addresses that the payment processes for SDA processes are functioning well (12.9%). Some respondents stated that the payment process has significantly improved and there are no issues securing payments once the SDA funding has been confirmed. Additionally, the payments from the NDIS were also reported to be straightforward and without delay, helping the efficiency of the SDA market.

However, it is important to keep in mind that this theme was endorsed by only a small proportion of providers ($n = 4$), out of which 2 reported not being owed any payments from the NDIA. While it is encouraging to see positive experiences with the payment processes, this theme should not be taken to dismiss the challenges with correct and timely payments from the NDIA reported above.

“Overall, after securing a full house of residents with SDA funding, the claim and payment process from the NDIS works promptly and without delay.”

“Once occupied and all of the issues are resolved, payment is fairly straightforward.”

– SDA Providers

Theme 6. Better education and understanding of SDA

The last theme identified that having better education and understanding of SDA has been beneficial to the market (9.7%). It was stated that when external stakeholders (i.e., investors, developers, support coordinators) understand the importance of what SDA can offer for tenants, it helps improve the market. Providers also reported that having access to SDA reports that provide information in relation to the

current demand of the market and understanding the impact of geographical location was important. However, providers stated that increased education regarding legislation for SDA would help improve the market further.

“Investor / Developers are realising what real SDA product is and what impact location has on vacancy.”

– SDA Provider

Discussion

This third *SDA Provider Experience Survey* revealed the current market sentiment and experiences of providers of New Build SDA. The survey covered aspects such as (1) the main barriers and time taken to find tenants and lease vacancies, (2) issues dealing with government policies and processes, and (3) securing the timely payment of SDA funds from the NDIA. The findings of this year's survey were also compared to the previous two *SDA Provider Experience Surveys*, enabling a unique perspective on the trajectory of issues in the SDA market over time.

In total, 41 SDA providers shared their experiences in this year's survey. Together, the survey respondents supplied almost one-quarter of all New Build SDA places enrolled with the NDIA and had committed over \$1 billion in capital to building new SDA. Therefore, the findings presented in this report reflect the experiences of providers who are well-established and representative of the SDA market, highlighting the importance of addressing the concerns and challenges revealed in the report.

Challenges with filling vacancies

One key challenge identified in the report was the high vacancy rate in the SDA market - approximately one-quarter (25.5%) of the respondents' New Build SDA places were vacant at the time of the survey. Similar rates were reported in the previous two *SDA Provider Experience Surveys*, indicating that vacancies are an ongoing challenge for SDA providers. In addition, providers again reported significantly long fill times of vacancies, with most providers indicating it takes 3-6 months to fill a single vacancy and 6-12 months to fill a project/group of dwellings in full. Concerningly, the vacancy rates reported in this survey are significantly higher than the vacancy rates assumed by the NDIA. Up until recently, the NDIA had factored in a vacancy rate of only 3-10% in their pricing models.⁵¹ While the NDIA has recently acknowledged that these rates are too low, the revised rates of 7.75-13.0% proposed in the SDA pricing review⁵² are still lower than the rates observed by the respondents of this survey. The higher than assumed vacancy rates pose significant financial risks for providers operating in the SDA market and thus, urgent action is needed to identify and address the factors contributing to these high vacancies.

Similar to the previous *SDA Provider Experience Surveys*, this survey assessed various challenges associated with finding tenants and filling vacancies that may help explain the high vacancy rates. All of the aspects assessed were rated as 'somewhat' to 'extremely' challenging, and the overall sentiment toward these challenges has remained fairly consistent over time with only little improvement. The lack of improvement suggests that the stewardship of the NDIA in addressing identified market challenges has not yet sufficiently progressed over time.

One of the most challenging aspects was the time the NDIA takes to make SDA and support decisions, which was rated as 'extremely challenging' by more than half of the respondents. This is interesting, given the speed of NDIA decision-making has reportedly significantly improved over the last year.⁵³ For example, there has been a reduction in the proportion of housing and support applications with processing times of over 60 days, from 45% in June 2022 down to 23% in June 2023.⁵⁴ While our

⁵¹ NDIA (2022). *NDIS Pricing Arrangements for Specialist Disability Accommodation 2021-22*. National Disability Insurance Agency. <https://www.ndis.gov.au/providers/pricing-arrangements/pricing-arrangements-archive>

⁵² NDIA (2023). *Specialist Disability Accommodation Pricing Review 2022-23 - Final report*. National Disability Insurance Agency. <https://www.ndis.gov.au/providers/housing-and-living-supports-and-services/specialist-disability-accommodation/sda-pricing-and-payments/sda-pricing-review>

⁵³ Summer Foundation (2023). *Down to 10 Days Campaign*.

<https://www.summerfoundation.org.au/down-to-10-days-campaign-sees-positive-results/>

⁵⁴ NDIA (2023). *NDIS quarterly report to disability ministers: Q4 2022-2023*. National Disability Insurance Agency. Fig.13. <https://www.ndis.gov.au/about-us/publications/quarterly-reports>

survey data did indicate a slight improvement in sentiment towards processing times, the finding that this aspect still represents one of the biggest challenges for providers suggests that improvements in the timeliness of NDIA decision-making are still needed.

In the recently released SDA Pricing Review, the NDIA also indicated that some of the vacancies may be *'attributable to oversupply in some areas and may reflect poor investment decisions that should not be incentivised'*.⁵⁵ According to the NDIA, the pricing arrangements should support a sustainable market by influencing providers' building decisions.⁵⁶ However, for SDA providers and investors to be able to make sound investment and building decisions, access to detailed, accurate and up-to-date market information is also needed - which is not currently available in the SDA market. Respondents of this survey indicated that supply and demand information provided by the NDIA often lacks detail and transparency, and that misinformation spread by market spruikers was not adequately addressed. While the Housing Hub and Summer Foundation offer various resources that help shed light on demand-supply questions (see Appendix B for further details), it is critical that the NDIA, as part of its stewardship role, improve access to much-needed market data.

To understand vacancy rates in more detail, for the first time, the *SDA Provider Experience Survey* also explored differences in vacancies across SDA building types and design categories. This analysis revealed that the highest vacancy rates were observed for Robust dwellings (particularly Houses and Group Homes) and Fully Accessible dwellings (particularly Apartments and Houses). Conversely, the lowest vacancy rates were observed in High Physical Support dwellings, particularly in Apartments - see result section.

The reasons for these differences in vacancy rates are likely complex and multifaceted. The low vacancy rate in High Physical Support properties may be due to providers trying to fill these vacancies by accepting tenants funded for a different design category, such as Fully Accessible. For example, in previous *SDA Provider Experience Surveys*,⁵⁷ providers indicated they feel pressure to lease their new SDA to participants with incorrect funding to fill their vacancies, despite this resulting in financial losses. Thus, the lower vacancy rates in High Physical Support dwellings do not necessarily mean that these properties can be more easily tenanted than other design categories.

The high vacancy rates in Robust Houses and Group Homes may be due to difficulties finding tenants with Robust design needs who can live in shared housing. Reports from providers have indicated that because of complex behaviours, most tenants for Robust properties need independent rather than shared living arrangements, however, these are not regularly funded. A better understanding of the needs of participants with a Robust housing need may be required of planners. For example, one provider suggested:

"Completely overhaul Robust space, from pricing to builds. The majority of Robust participants require single occupancy, when there's not even a price line item for a single occupancy house."
- **SDA Provider**

Challenges after filling vacancies

Even after filling vacancies, SDA providers continue to face financial challenges. Almost all (78.0%) of the providers in the survey indicated they are receiving a lower income than expected for at least some of their SDA properties. Moreover, the majority of providers (65.0%) reported they were owed payments

⁵⁵ NDIA (2023). *Specialist Disability Accommodation Pricing Review 2022-23 - Final report*. National Disability Insurance Agency. Pg. 27. <https://www.ndis.gov.au/providers/housing-and-living-supports-and-services/specialist-disability-accommodation/sda-pricing-and-payments/sda-pricing-review>

⁵⁶ Ibid. Pg. 5.

⁵⁷ Wellecke, C., Robertson, J., Mulherin, P., Winkler, D., Rathbone, A., & Aimers, N. (2022). *Specialist Disability Accommodation provider experience survey: June 2022*. Housing Hub and Summer Foundation. <https://apo.org.au/node/318315>

from the NDIA for participants living in their New Build SDA places. The overdue payments totalled almost \$2 million across 25 SDA providers, of which more than one-third were overdue by more than 90 days. Interestingly, despite these amounts, securing SDA payments from the NDIA appeared to be perceived as slightly less challenging this year compared to last year (the sentiment toward this has improved from ‘moderately’ to ‘somewhat’ challenging). However, overdue payments still likely pose a significant financial risk to SDA providers given their considerable extent and length, and, as such, warrant urgent attention from the NDIA.

Some of the main reasons for overdue payments were slow administration by the NDIA (i.e., the NDIA processing applications and requests slowly) as well as issues with service bookings. Almost all providers who were owed SDA payments stated their overdue payments were due to slow NDIA administration, with approximately \$1.3 million of the overdue payments attributable to this reason. Likewise, since the first *SDA Provider Experience Survey*, issues with service bookings have consistently been rated as one of the most challenging aspects once tenants have moved in, and more than half of the respondents in this year’s survey suggested that improvements to service bookings would help ensure timely and accurate SDA payments. Issues surrounding service bookings involved service bookings not being created on time or created for the wrong amount, and, compounded by the slow administration by the NDIA, such errors are slow to be resolved. Providers suggested they would like to be able to create their own service bookings to avoid these issues or that the need for service bookings should be eliminated altogether. Interestingly, this suggestion is in line with a current NDIA trial in Tasmania testing a new portal system (PACE) that removes the need for service bookings.⁵⁸ It will be interesting to see whether this system will be rolled out nationally and, if so, what effects this may have on the accuracy and timeliness of SDA payments.

In addition to issues with accurate and timely payments, respondents reported that SDA funding amounts (at the time of the survey) were too low to adequately cover the rise in building costs. While the NDIA has recently undertaken a review of pricing arrangements,⁵⁹ providers noted that such reviews were needed more frequently to enable pricing to keep pace with market changes. Providers also noted that the pricing reviews should include a more fundamental review of the building configurations enabled in the pricing structures, with some calling for more independent living options within the House building type.

Lastly, the annual reviews of participants’ plans appeared to pose an ongoing burden on providers. Changes occurring due to NDIS plan reviews were perceived as more challenging this year compared to 2021 and 2022, and in an open-ended question providers elaborated that annual plan reviews can waste time and resources. Dealing with the issues that are created by annual plan reviews would likely free up resources and avoid errors in payment processes (such as when funding amounts are entered incorrectly following a plan review).

Strengths of the market and the way forward

Despite the above challenges, it is encouraging to see that a large proportion of providers commented on the strengths of the SDA market. Similar to last year’s survey, one of the greatest strengths endorsed by almost one-third of the respondents was the positive impact SDA properties have on the lives of

⁵⁸ NDIA (2023). *For providers - learn about our new computer system*. National Disability Insurance Agency.

<https://www.ndis.gov.au/improvements/providers-learn-about-our-new-computer-system>

⁵⁹ NDIA (2023). *Specialist Disability Accommodation Pricing Review 2022-23 - Final report*. National Disability Insurance Agency. Pg. 27.

<https://www.ndis.gov.au/providers/housing-and-living-supports-and-services/specialist-disability-accommodation/sda-pricing-and-payments/sda-pricing-review>

people with disability. In line with previous research,⁶⁰ providers discussed that it was rewarding to be involved in the SDA journey of participants, highlighting the positive outcomes that SDA has on their tenants' quality of life and community integration. Other strengths noted related to the high quality of SDA developments, the continued interest from large-scale investors, and the willingness of different stakeholders to collaborate.

While it is encouraging that providers noted various strengths of the SDA market, these positive remarks do not override the ongoing challenges and barriers identified in this report. Most of these challenges have remained relatively stagnant over time with only little improvement, and thus pose a risk to the ongoing viability of the SDA market. It is critical that the NDIA considers and addresses the concerns raised by the growing evidence of the *SDA Provider Experience Surveys*. This will ensure that the SDA market can achieve its full potential and that providers continue operating in the market with a positive outlook. Specific suggestions for the NDIA are presented below.

Recommendations

- 1. Understand the continually high vacancy rates being reported.** Consider what factors are contributing to these rates that are within the remit of the NDIA as the steward of the SDA market (e.g. lack of activation of demand, lack of detailed data that signals to providers what is required to be developed, inefficient NDIA administrative processes).
- 2. Improve the skills of key actors within the SDA market.** NDIA planners should understand SDA and associated supports so correct information is provided to participants and decisions are made consistent with the legislation. Participants with complex needs (the SDA cohort) should be funded for Level 3 Specialist Support Coordination that is delivered by skilled professionals. This will improve efficient use of public funds and enable quality submissions for SDA and support funding that can be handled efficiently by the NDIA.
- 3. Accelerate the speed and accuracy of NDIA processes,** including administrative processing of payments, ensuring that when a plan is reviewed annually that the SDA service booking is created immediately, and improving the time taken to make decisions on SDA, support and assistive technology for participants.
- 4. Establish an SDA contact team** within the NDIA to enable a single point of contact that provides skilled, fast and specialised advice and assistance with amending errors.
- 5. Improve the SDA demand data** provided to the market to facilitate better decisions by providers and investors based on the housing needs and preferences of participants.
- 6. In collaboration with other government agencies, effectively address misinformation** about the SDA market to tackle incorrect perceptions about SDA returns, avoid inappropriate housing being developed and retail investors being taken advantage of.
- 7. Improve the processes of SDA service bookings** by either enabling SDA providers to create service bookings themselves, providing more training to those responsible for creating them, or eliminating the need for service bookings.
- 8. Ensure the NDIA pays SDA providers** the correct amount on time as per standard business rules.

⁶⁰ Oliver, S., Gosden-Kaye, E.Z., Winkler, D., Douglas, J.M. (2020). *The outcomes of individualised housing for people with disability and complex needs: A scoping review*. Disability and Rehabilitation.

<https://www.tandfonline.com/doi/full/10.1080/09638288.2020.1785023>; Douglas, J.M, Winkler, D., Oliver, S., Liddicoat, S., D'Cruz, K. (2022). *Moving into housing designed for people with disability: Preliminary evaluation of outcomes*. Disability and Rehabilitation. <https://www.tandfonline.com/doi/full/10.1080/09638288.2022.2060343>

Appendix A: SDA design categories and building types of New Build SDA

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.⁶¹ New Build SDA dwellings are enrolled with the NDIA in 1 of 4 design categories. Older SDA properties that do not have any special design features have previously been 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 by voice or with 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 do not impact the tenants and so that any noise the tenants make does not 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 are home for up to 5 participants.

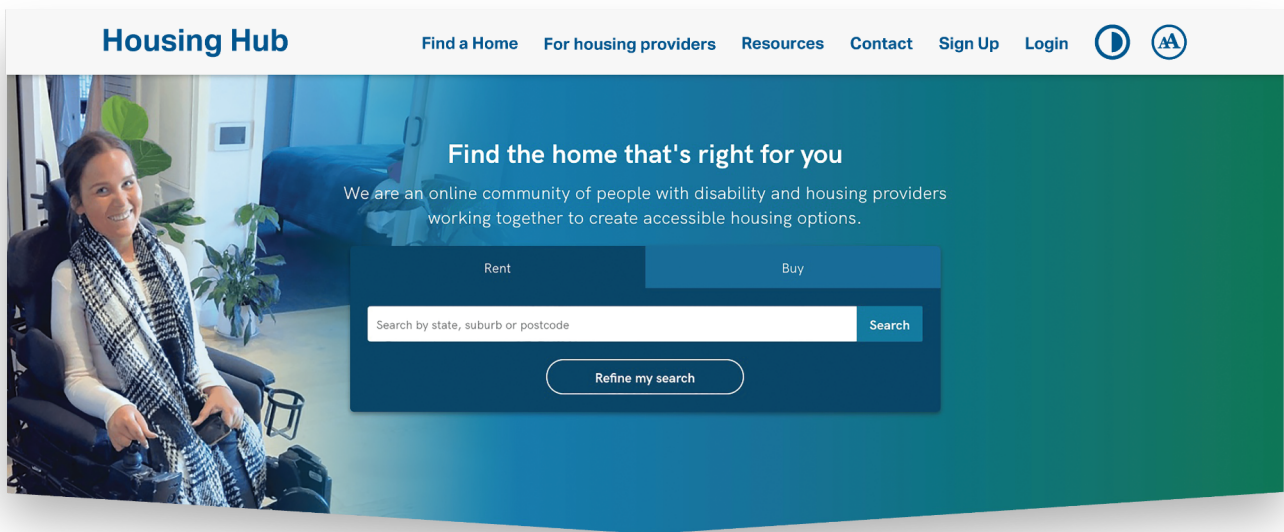
Larger Dwellings – properties that house more than 5 long-term participants. This is also called 'Legacy SDA'. Larger dwellings are only for participants who already lived in this type of dwelling before their first NDIS plan. SDA payments for Legacy stock cease 5-10 years after enrolment with the NDIA, meaning that a large number of Legacy dwellings will exit the scheme or be renovated or refurbished to enrol as New Build SDA over the coming years.

⁶¹ NDIA (2022). *Specialist Disability Accommodation: Operational guidelines*. National Disability Insurance Agency. <https://ourguidelines.ndis.gov.au/supports-you-can-access-menu/home-and-living-supports/specialist-disability-accommodation>

Appendix B: 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 over 3,300 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 provides the seeker with a clear assessment of how well the property aligns with 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 to 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 7,000 seekers signed up with the Housing Hub as of July 2023, 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.

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. Through workshops, resources, and the Housing Advice Line (1300 61 64 63), people with disability are supported 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 range of premium services for a fee, to housing providers, investors and developers operating in the accessible housing market.

Understanding the SDA Market

Understanding the SDA market is extremely important when planning your property pipeline. With access to critical information around supply and demand in the accessible housing market, providers and investors can harness this knowledge to ensure building decisions match the needs of housing seekers.

The Housing Hub has made it easier for investors to gain a clearer picture of SDA supply and demand by developing three unique products available for purchase.

Market data subscription

Generalised data resulting from housing seeker searches on the Housing Hub can be used to understand demand for accessible housing in locations across Australia. With insights into what types of housing (and housing features) are desired in locations, providers can build to address demand with greater certainty.

The market data subscription includes a data report in an easy-to-read dashboard and an Excel format spreadsheet that can be emailed to subscribers on a quarterly basis in early January, April, July, and October each year. Each report includes the three preceding months of housing seeker search data, as well as information about supply. Demand data is shown by SA3 and SA4 locations across the whole of Australia, and shows the number of searches for each location along with the number of searches for property types and design categories. Supply data is from the SDA Supply in Australia report and NDIA data. [Click here for more information.](#)

The market data report can also be purchased as a one-off report.

Market data report for a Local Government Area

A bespoke report for a Local Government Area can be developed to show the demand and supply for housing in that area from data within the Housing Hub and the SDA Supply Report. Data is shown for a 3-month period in detail for the selected Local Government Area. [Click here for more information.](#)

SDA Supply - Premium Addendum

The SDA Supply Premium Addendum extends upon the Housing Hub's annual SDA Supply in Australia report (released in October 2022), providing a snapshot of the SDA dwellings in the pipeline across Australia.

The data is presented in a detailed spreadsheet format that enables information to be filtered and sorted to suit your individual needs.

The Premium Addendum includes:

- Pipeline data from the 2022 SDA supply survey shown by SA3 regions
- NDIA data on demand and supply shown by SA3 regions
- Pipeline conversion data tracking the progression of SDA pipeline dwellings from our 2021 SDA supply survey to our 2022 SDA supply survey

[Click here for more information.](#)

Attracting tenants

The Housing Hub offers a number of ways to feature your organisation and its properties to engage with prospective tenants.

Featured property listing

Housing 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 via the Housing Hub's social media channels and via email to our subscriber list. Featured Listings are targeted to the audience from the state where the listing is located. [Click here for more information.](#)

Advertising

Providers can also advertise their organisation and link to their provider page on the Housing Hub through paid advertisements that appear as banner ads on housing seekers' search results page. [Click here for more information.](#)

Providers can promote their properties within a state-based electronic newsletter and via Housing Hub Social Media channels. Click here for more information: [Social Media](#) or [e-news](#).

Housing Hub listing service

Let the Housing Hub's experienced team take care of creating your listings. The Housing Hub team can arrange to have high quality images taken of your property, write the copy and create the listing. [Click here for more information.](#)

Listing performance dashboard

For providers who would like to analyse the performance of their listings on the Housing Hub, a customised listing dashboard can be created to track the performance of each listing on a daily basis across key metrics such as views, enquires, phone calls and website click throughs. [Click here for more information.](#)

Supporting prospective tenants to secure SDA and support funding

The Housing Hub offers a specialist home and living support coordination service. This service only undertakes support coordination for home and living supports, therefore it compliments a participant's existing support coordinator to support people with disability to prepare evidence to submit to the NDIA for Home and Living supports. [Click here for more information.](#)

For more information on the Housing Hub's suite of services for housing providers and vendors, see the tab 'Provider Services' on the [Housing Hub website](#) or contact the Housing Hub's Customer Solutions Coordinator, Rachel Murray [via email](#) or by phoning 0497 814 567.

Appendix C: The 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

Established in 2006, the Summer Foundation is a not-for-profit organisation that is committed to resolving the issue of young people living in aged care. The Summer Foundation commissioned 2 housing demonstration projects for younger people with disability living in, or at risk of admission to, nursing homes. The first project featured 2 apartments in Abbotsford, Victoria in 2013. The success of this first project was replicated with 10 more apartments in the Hunter region of NSW 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 and be co-located to enable the cost-effective provision of support.

People with disability also need ways to effectively connect with housing that may be right for them. Recognising this deficit in the accessible housing market, the Summer Foundation created the [Housing Hub website](#) and an associated Tenancy Matching Service in 2017. The Housing Hub website is an online platform that supports housing seekers and housing providers to connect and is free for both housing seekers and housing providers. Housing providers can choose to pay for premium listings and bespoke data reports. The website has almost 2,000 housing providers listing both SDA and non-SDA properties.

The Summer Foundation is not an SDA provider or a registered NDIS provider and does not own any SDA funded apartments.

From 2017 to 2023 the Housing Hub's Tenancy Matching Service worked with SDA providers to identify potential tenants for new SDA projects in the pipeline. Over this time, the Tenancy Matching Service supported more than 950 participants to receive a housing offer in New Build SDA, including 116 younger people who were living in residential aged care. Through the work of the Tenancy Matching Service, the Housing Hub team has witnessed hundreds of SDA-eligible participants going without effective support for accessing housing due to a lack of specialist housing support coordinators. As a result, a trial of a Support Coordination Service for home and living supports has been established. This is being undertaken in partnership with Verbinding, a registered support coordination provider.

Many different disability organisations are providing shared support to tenants living in SDA apartments across Australia. 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 wants to see a whole range of dwelling types and housing options so that participants have a real choice. We do not have a vested interest in any particular dwelling type and promote the benefits of a diverse market with flexible support arrangements, tailored to the needs of individuals.