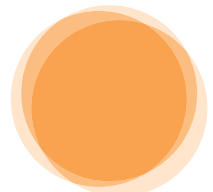


**ANNUAL REPORT**  
**2018/2019**

SUMMER  
FOUNDATION





SEE MORE ON PAGE 14

# 259,140

WEBPAGE VIEWS ON THE HOUSING HUB WEBSITE



# 80

TENANTS  
MATCHED  
WITH SDA

MORE THAN



# 34,000

PEOPLE VISITED THE HOUSING HUB WEBSITE

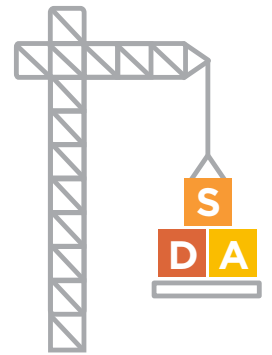
# 350



PEOPLE ATTENDED  
EVENTS TO CONNECT  
WITH SDA PROVIDERS

IDENTIFIED

# 1,500



NEW SDA PLACES IN DEVELOPMENT – PAGE 19

# 150



PEOPLE ATTENDED OUR  
ANNUAL PUBLIC FORUM  
– SEE PAGE 12

# 400



PEOPLE ATTENDED  
THE NATIONAL SDA  
CONFERENCE – PAGE 18

# 38



GUIDES & VIDEO  
RESOURCES  
DEVELOPED



**6** YOUNG AUSTRALIANS  
ENTER AGED CARE  
**EVERY DAY**

**5,800** 

**YOUNG PEOPLE (AGED UNDER 65)  
LIVE IN AGED CARE**

**WE SUPPORTED**

**100**



**PEOPLE TO MAKE SUBMISSIONS  
TO THE ROYAL COMMISSION – PAGE 10**

**WE TRAINED**

**1,411** 

**HOSPITAL DISCHARGE STAFF – PAGE 12**

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Annual report for year ending  
30 June 2019

Summer Foundation Ltd.

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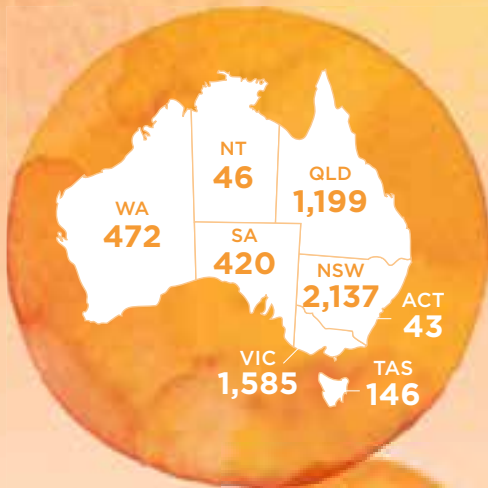
# THE ISSUE: YOUNG PEOPLE IN AGED CARE

Today in Australia more than 5,800 young people with disability live in aged care because there is nowhere else for them.

Many of these people are aged in their 30s and 40s, living with people in their 80s. They rarely see family or friends and it is common for young people in aged care to lose skills and independence.

Around half the younger people in aged care had a partner when they started living in aged care. About a quarter of younger people in aged care have school-aged children. A nursing home is not the right place to try to raise a family.

The National Disability Insurance Scheme (NDIS) can support young people with disability to avoid aged care or help them leave it for more suitable housing. When the NDIS, health and aged care systems work well together more young people with disability will be able to choose where they live and who they live with.



We use 5 tools to influence systems change:

## HOW WE WORK



### RESEARCH

Data collection and analysis to provide an evidence base for problem solving



### STORYTELLING

Support people with lived experience to share their journeys and perspectives



### POLICY INFLUENCE

Shape thinking and change decisions of governments



### CAPACITY BUILDING

Share information and best practice with stakeholders



### PROTOTYPE

Designing, testing and evaluating new solutions

# CHAIRMAN'S MESSAGE

The Summer Foundation began in 2006. We are working to stop young people having to live in aged care. Like everyone else, young people with disability should be able to choose where they live and who they live with.

We think that the issue of younger people having to live in aged care can be solved quickly if everyone works together. To solve the problem, the Summer Foundation is looking at 4 areas:

- Housing
- The NDIS
- People's pathways home from hospital and aged care
- Community and primary health for people with complex disability

In this report, you can read about the work the Summer Foundation has been doing in these areas. You can also read about how our work is changing the lives of people like Shanais, Lisa, Jan and Jessica.

Our highlights for this year are on the following pages. They include:

- The Aged Care Royal Commission
- Leaving Hospital Well (Hospital Discharge)
- Housing Matching
- Systems Advocacy
- Research
- Get Building SDA

This year we have two new Board members, Professor Andrew Way and Adam Horsburgh. Andrew and Adam are experienced hospital professionals. They will help us connect with hospitals and understand why so many young people are going from hospital into aged care.

Thanks to the Summer Foundation staff, Board and all the people who have worked with us this year to make real progress towards achieving our mission.



**Paul Conroy**  
Chairman



## **Our Mission**

**To create, lead and demonstrate long-term sustainable systems change that stops young people from being forced to live in residential aged care because there is nowhere else for them.**

## OUR GOALS

OUR OVERARCHING GOAL IS THAT PEOPLE WITH DISABILITY AND COMPLEX SUPPORT NEEDS LIVE WHERE AND WITH WHOM THEY CHOOSE, WITH ACCESS TO HIGH QUALITY HOUSING AND SUPPORT OPTIONS THAT ENHANCE HEALTH, WELLBEING AND PARTICIPATION.

Four key strategic priorities direct the focus and scope of our work. These priorities are where we can achieve the greatest impact.

Read about what we've achieved and what's to come in each of these areas on pages 3 – 7.



RAC = residential aged care








# HOUSING







By June 2021 we expect the volume and range of accessible and affordable housing to have significantly increased.

## WHAT WE ACHIEVED IN 2018 – 2019


### Navigating the housing market:

-  Matched more than 80 tenants with SDA through our Tenancy Matching services
-  Upgraded The Housing Hub
-  39,384 people visited The Housing Hub website, 259,140 pages viewed

### Building and sharing knowledge to increase the range and scale of suitable housing:

-  Developed Get Building SDA website and resources
-  More than 350 attended 5 workshops to connect PWD and SDA providers
-  More than 200 SDA providers and investors attended 14 workshops across NSW
-  Get Building SDA National Conference – more than 400 attendees and 20 presenters, including NDIA CEO and Minister for Social Services
-  A national survey identified more than 1500 new SDA places in development
-  Led joint submission with 21 organisations to the Federal Government review of the SDA Framework

### Innovation and collaboration:


-  Built a rapid interim housing prototype

## WHAT'S TO COME IN 2019 – 2020

### Navigating the housing market:

-  Match more than 100 NDIS participants with new SDA places
-  Upgrade The Housing Hub to include participant profile and 'smart matching' functions
-  Share stories of housing outcomes
-  Understand the barriers to achieving great housing outcomes and share stories of these being overcome





### Innovation and collaboration:

-  Develop national education resources for SDA providers about best practice

### Building understanding:

-  Roadmap to outline future of disability housing in Australia

### Building the evidence base:

-  Research into SDA tenant outcomes
-  Analyse demand data from people with disability seeking housing
-  Pilot different ways to match people with disability in hospital with housing
-  Deliver the second round of SDA supply survey








# NDIS



By June 2021 younger people in RAC and those at risk of entry to RAC should have the capacity and support to achieve their goals through access to the NDIS.

## WHAT WE ACHIEVED IN 2018 – 2019

### Summer Foundation impact on NDIS response to needs of younger people in RAC or those at risk:


-  Advocacy at more than 15 meetings with ministers, advisors and senior officials
-  Informed the development of Federal Government National Action Plan to halve number of young people in RAC by 2025
-  NDIS report cards to monitor NDIS performance
-  Published 4 written resources and 13 digital products to help young people in aged care get a good NDIS plan
- 

### Better implementation of NDIS plans:


-  Launched 'UpSkill' to build capacity of support coordination workforce
-  Training sessions for support coordinators

## WHAT'S TO COME IN 2019 – 2020

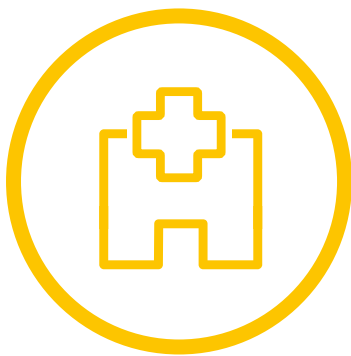
### Better implementation of NDIS plans:

-  Collect data on NDIS plans, support needs and outcomes
-  Participate in YPIRAC Aged Care Action Plan reference group
-  NDIS report cards to monitor NDIS performance
-  Contribute to new National Disability Agreement
-  Share stories of excellent support coordination

### Building workforce capacity:

-  Expand UpSkill program to build the capacity of support coordinators





# PATHWAYS HOME

By June 2021 clear communication and effective collaboration between health, disability and other systems will support young people to return to the community post hospital discharge.

## WHAT WE ACHIEVED IN 2018 - 2019

### Young people have better support to leave aged care:



15 written resources and 7 digital products to help aged care and ACAT providers support young people to leave aged care



8 workshops for 57 aged care and ACAT providers

### Bringing national focus to the issue:



43 workshops for 1,411 hospital discharge staff to better work with young people



Annual Public Forum – From Hospital to Home



Supported 100 people to make submissions to Aged Care Royal Commission



Developed Collaborative Discharge Approach (CDA) that provides guidance for hospital discharge process

## WHAT'S TO COME IN 2019 - 2020

### Bringing national focus to the issue:



Working with large hospitals to shape and better understand best practice hospital discharge



Summer Foundation submission and evidence to Royal Commission



Policy input into the relationship between health and NDIS in supporting participants to discharge from hospital to home



Work with hospital senior executives on supporting NDIS participants in their discharge journey

### Research:



Journal article looking at rehab patients discharged to aged care between 2012 and 2017



Evidence gathering around discharge processes and younger people's pathways into aged care



# PRIMARY & COMMUNITY HEALTH

By June 2021 we will understand what needs to be done to ensure people get the right support to live in their communities.

## WHAT WE ACHIEVED IN 2018 - 2019



A scoping review to examine the health needs, costs and services used by people with disability and complex support needs

## WHAT'S TO COME IN 2019 - 2020



Engagement with primary and community health professionals across Victoria



“

**I'M PAYING MY TAXES  
AND I'M PAYING MY BILLS,  
I JUST NEEDED HELP TO  
CONTINUE TO DO THAT AND  
LIVE INDEPENDENTLY IN  
THE COMMUNITY.**

”

**READ SHANAIS'  
STORY ON PAGE 20**

## RESEARCH AND INNOVATION

Work to properly understand why young people end up in nursing homes and give us the info we need to find ways to solve the problem.

Dr Di Winkler – Chief of Research & Innovation  
Dr Glenda Bishop – Research Centre Administrator  
Megan Topping – Doctoral Researcher  
Dr Rebecca Jamwal – Research Fellow  
Dr Mark Brown – Research Fellow  
Dr Stacey Oliver – Research Assistant  
Jacqui Naismith – Research Assistant  
Emily Gosden-Kaye – Research Assistant  
Hannah Jarman – Research Assistant  
Anna Ewen – Research Assistant  
Natalie Rinehart – Data Scientist

## POLICY

Help other people to understand the problem of young people in aged care and change decisions of government.

Dr George Taleporos – Policy Manager  
Robin Zakharov – Senior Policy Advisor  
Penny Paul – Senior Policy & Research Officer  
Rosalyn Roberts – Policy Research Officer  
Helen Jeisman – Projects Support Officer

## PRACTICE

Help hospitals, aged care and the NDIS work better together.

Tom Worsnop – Executive Manager – Practice  
Joy Campbell – Executive Support/Information Officer  
Zoe Shearer – Practice Team Leader  
Cathy Bucolo – Clinical Practice Leader  
Virginia Mitsch – Hospital Discharge Lead  
Andrea Lockwood – Practice Coordinator  
Joanna Stewart – Practice Coordinator  
Gill Hilton – NDIS & Health Interface Specialist  
Michelle Bult – Health Engagement Lead

## HOUSING MATCHING

Provide services to help people with disability to find suitable housing.

Alecia Rathbone – General Manager, Housing Matching  
Jessie Lewis – Operations Coordinator  
Joanne Mear – Business Manager  
Vanessa Lui – National Tenancy Matching Manager  
Libby Ellis – Person Centred Content Coordinator  
Mishele Cavanagh-Downs – Housing Engagement Manager  
Olga Elia – Engagement Coordinator  
Sophie Moore – Engagement Coordinator  
Megan Milles – Reporting Coordinator  
Emma Newby – Reporting/Project Coordinator  
Jean Tiller – Housing Matching Manager  
Melody Carbarns – Housing Matching Manager VIC  
Alison Burgess – Project Coordinator QLD  
Jessica Rixon – Project Coordinator Newcastle  
Jennifer Merriman – Project Coordinator ACT  
Maria Ellensohn – Project Coordinator NSW  
Penny Stevenson – Project Coordinator VIC  
Kelly Aguirre – Housing Matching Coordinator  
Simone Burley – Project Coordinator – Person Led Housing Solution  
Leah Jeskie – Information & Lived Experience Facilitator  
Syed Hague – IT Admin & Website Support

## COMMUNICATIONS

Assist people with disability to tell their stories and understand their options. Make sure everyone has the info they need to stop younger people from going into nursing homes.

Carolyn Finis – Chief of Staff

Natasha Hendricks – Executive Assistant

Vince Patton – Communications Strategist

Antony Brown – Graphic Designer/Projects Coordinator

Monique de Costa – Storytelling Manager

Jocelyn Geary – Impact & Partnerships Manager

Alana Dobra – Event Coordinator

Gina Fall – Storytelling Program Officer

Jodie Gallacher – Digital Editor

Marcus Oliver – Finished Artist

Collette Beck – Content Editor

Tricia Quirk – Content Editor

## OPERATIONS

Make sure that the Summer Foundation works well.

Susi Hammond – Chief Finance & Operations Officer

Jessica Simms – Executive Assistant, Human Resources & Accounts Assistant

Tim Salter – Finance Manager

Stephanie Press – Finance Coordinator

Julie Gibson – Operations Coordinator

Dianne Trevisan – Receptionist



## LUKE BO'SHER

### Chief Executive Officer

Luke joined the Summer Foundation in 2016 as Head of Policy and Strategy, leading our work to develop housing for people with disability using NDIS funding. Appointed CEO in April 2018, Luke works with government stakeholders to influence policy in relation to young people in aged care.

Luke was previously involved in the development of the NDIS as a Director at the National Disability Insurance Agency and advisor at the Department of the Prime Minister and Cabinet.

Luke completed a Fulbright Scholarship and Master of Public Administration at New York University.

We also would like to acknowledge the following staff who concluded (or took leave from) their employment in 2018-19: Anna Fragkoud, Damian Grant, Dayanna Torres, Elizabeth McFarlin, Joanna Middleton, Joshua Zail, Julie Robertson, Karen Chapman, Karina Grift, Kirsten Larwill, Louise Dixon, Natalie Butler, Sharon Jenkins and Toni Rowe.



## AGED CARE ROYAL COMMISSION

THE SUMMER FOUNDATION WELCOMED THE AGED CARE ROYAL COMMISSION WHEN IT WAS ANNOUNCED BY PRIME MINISTER SCOTT MORRISON IN SEPTEMBER 2018.

We were really pleased that the issue of young people in residential aged care was identified as a high priority for the Royal Commission.

Aged care is no place for young people and the Royal Commission should focus on ensuring the disability, health and housing systems deliver alternatives that will keep young people with disability out of nursing homes.

Nothing can make aged care the best place for young people. Instead, society should give young people better options to avoid aged care. The Royal Commission has a chance to bring about a solution to this complex problem.



**VICKI WILKINSON**  
who is in her late 40s, lived in aged care for 4 years.

Vicki said she still lacks the supports to properly integrate into the community where she is living.

"The issue of young people being forced to live in nursing homes needs to be kept in the forefront of people's minds. This is a potential human rights issue first and foremost.

"Nursing homes for young people take away your self respect, dignity, and leave you where you can't make a decision.

"Moving into a nursing home tore my family apart. The isolation is really hard on one level, but having choices taken away from you is worse."



**PETER FRENCH\***  
is 48 and has been in aged care for 2 years.

"Basically, I had to go to [the nursing home] because they couldn't do the personal care I required at home without modifications to my home, but they couldn't make the home modifications because it was a private rental.

"Now I'm 48, I'm still the youngest one in the nursing home by a considerable amount. It does your head in there because you've got people in there that you speak to and try to become close to, but then they die. People die.

"There's not a lot for a younger person to do in a nursing home. I've got alarms set on my phone... so I don't nod off and miss lunch or dinner. I'm not into bingo or knitting."

*\*not his real name*



Giving young people with disability a voice at the Royal Commission has been very important to us.

Under the banner of #everystorymatters, and with support from the Royal Commission, we held 18 workshops in major cities and regional areas across Australia. Through the workshops we supported 100 people to make their submissions to the Commission. Many of them said they would never have told their stories without the support they got at our workshops.

We also supported 5 people to speak directly to the commissioners at public forums in Bendigo and West Melbourne.

The Summer Foundation will also make its own submission to the Commission. It will talk about the key policy and systemic changes needed to help young people with disability to find alternative, age-appropriate housing and to halve the number of younger people entering aged care.

The submission will be based on our ongoing work with providers in the health and aged care sectors, but particularly on information that was shared by people at the workshops. These are the people whose stories illustrate the realities of living in aged care. It is important for the Royal Commission to hear their stories.



**ANJ BARKER**  
now 33, was 16  
when she was  
brutally bashed  
to near-death by  
an ex-boyfriend.

Anj lived in aged care for 2½ years before moving back with her family.

Anj says without the support from her parents and the generosity of friends and community, she would probably be dead.

"My friends did want to come and see me, but didn't because they didn't want to come and hang out in a nursing home. I felt unloved, unwanted and lonely. It was horrible."

Anj now campaigns for alternatives to aged care for young people with disability, and raises awareness of relationship violence. She works part-time and lives independently with support.



**JAMES NUTT**  
was in his early  
20s when he was  
"sentenced" to  
aged care after  
being assaulted  
by a co-worker.

James lived there for 7 years before moving to a supported independent living residence in 2012.

"It felt as though there was no longer any sense in sticking around on this earth.

"Within a few short weeks I became so depressed. This became so bad that it felt as though the only way to end this way of life was to commit suicide. I tried a few times.

"You might make a friend or acquaintance, but the next week they're dead. A 21-year-old should not be losing the people around them like that."

## LEAVING HOSPITAL WELL

**YOUNG PEOPLE WITH DISABILITIES ARE TOO OFTEN FORCED TO REMAIN IN HOSPITAL OR REHAB BECAUSE THERE IS NO CLEAR PATHWAY HOME. OR THEY ENTER AGED CARE BECAUSE THEY CANNOT ACCESS THE SUPPORTS THEY NEED TO LIVE IN THE COMMUNITY.**

The NDIS, health and aged care systems do not work well together to make sure people with disability have the right supports in place when they are ready to leave hospital, so they can return to their homes or to suitable housing in the community.

This year our hospital discharge work has focused on three main things:

- A Collaborative Discharge Approach
- Workshops to build the skills of hospital discharge staff
- Our Annual Public Forum

The Annual Public Forum in October 2018 showed that a good hospital discharge process for people with disability is very important.

The forum brought together more than 150 hospital discharge professionals, people with lived experience and disability sector professionals. They heard personal stories about people's hospital discharge experiences and difficulties accessing the NDIS, but also about positive outcomes that have been achieved.

**WE TRAINED**

**1,411**



**HOSPITAL  
DISCHARGE  
STAFF**

## COLLABORATIVE DISCHARGE APPROACH

We have prototyped a Collaborative Discharge Approach (CDA) to help the NDIS, health and aged care systems, support coordination and housing work together.

The CDA brings together what we've learned from a number of Summer Foundation projects and explores a hospital discharge process that can be used in all hospitals.

The CDA takes people through all the steps that must be completed to make sure a person with disability can leave hospital well.

It will help younger people with disability and complex needs return to their homes or suitable housing in the community with supports in place, and without delays in their hospital discharge.

This year we held 43 workshops for 1,411 hospital discharge staff across the country.



## HOUSING MATCHING

WE ESTABLISHED OUR HOUSING MATCHING SOCIAL ENTERPRISE TO PROVIDE A WAY FOR PEOPLE WITH DISABILITY TO FIND A HOME THAT IS RIGHT FOR THEM. IT INCORPORATES THE HOUSING HUB WEBSITE AND THE TENANCY MATCHING SERVICE.



**THE HOUSING HUB  
HAS LISTED**

**768**

**DWELLINGS**

The Housing Hub ([thehousinghub.org.au](http://thehousinghub.org.au)) is dedicated to supporting people with disability find a home they would like to live in. It also provides a place for housing providers in Victoria, New South Wales, Queensland, the ACT and South Australia to list their properties, for both Specialist Disability Accommodation (SDA) and non-SDA properties.

Over the past financial year, The Housing Hub has listed 768 dwellings and more than 39,300 people have visited the site. Upgrades were made to the site during the year and further work will be done next year to include a participant profile function.

The Tenancy Matching Service (TMS) supports people with disability who are likely to be eligible for SDA funding to apply for new properties. At the moment, it is connecting participants to properties across Queensland, New South Wales, the ACT and Victoria. The TMS provides support and mentoring to support coordinators and health professionals who are supporting people with disability to apply to the NDIA to have SDA included in their NDIS plans.

This year the TMS supported 45 people with disability to connect with SDA providers in order to be offered a new home at properties in Belmont (NSW), Fairfield (Vic), Cheltenham (Vic), Ringwood (Vic), Guilford (NSW), Woolloongabba (Qld) and Rockdale (NSW).

To meet the growing demand for our services, the Housing Matching Social Enterprise has employed an additional 15 staff during the past financial year.

## SYSTEMS ADVOCACY

THE LAST FEW MONTHS OF THE 2018-19 FINANCIAL YEAR SAW POSITIVE OUTCOMES IN SEVERAL AREAS THAT ARE CRITICAL TO SOLVING THE ISSUE OF YOUNG PEOPLE IN AGED CARE.



**THE GOVERNMENT HAS COMMITTED TO HALVING THE NUMBER OF YOUNGER PEOPLE ENTERING AGED CARE BY 2025**

The Young People in Residential Aged Care Action Plan was announced by the Hon Paul Fletcher, then Minister for Families and Social Services, at our SDA national conference.

It commits the government to halving the number of people with disability aged under 65 entering aged care by 2025, improving NDIS processes for young people in aged care, and increasing housing options for young people with disability.

In June 2018, we coordinated a submission from 21 organisations to a government review of the SDA Pricing and Payments Framework.

The submission outlined key concerns that the organisations felt were hampering the potential to build a diverse, innovative and responsive SDA market.

Addressing these concerns, the government announced reforms to the Framework at the opening of Summer Housing's new purpose-built SDA apartments in Fairfield in February 2019.

The Summer Foundation also welcomed the decision by the Council of Australian Governments' Disability Reform Council at the end of June 2019 for the NDIS to fund a range of disability-related health supports.

This means that the NDIS will now pay for essential supports that were previously falling between the cracks of the NDIS and health system interface.

When these supports were not being funded by the NDIS, people with disability were too often stuck in hospital or aged care as the only places where they could get the supports. Examples include respiratory and continence supports, supports to manage epilepsy, pressure wounds, swallowing difficulties, and podiatry.

The decision will allow many younger people stuck in aged care or hospitals to return to their communities.

## RESEARCH

THE WORK OF OUR RESEARCH TEAM IS IMPORTANT TO HELP UNDERSTAND WHY YOUNG PEOPLE END UP IN AGED CARE, AND WHAT NEEDS TO CHANGE IN THE HEALTH, HOUSING AND DISABILITY SYSTEMS TO STOP IT HAPPENING.

During the 2018-19 financial year, the research team worked on:

 **9 PRIMARY DATA PROJECTS**

 **6 SCOPING REVIEWS**

 **7 ADMINISTRATIVE DATA PROJECTS**

Primary data projects collect information from people about their lived experience. Areas we looked at included:

- How moving into a new SDA home affects people with disability
- How the building, technology and support in SDA homes are used by people with disability
- The barriers and facilitators for effective hospital discharge planning for people with disability
- The experience people with disability and complex needs have with the NDIS
- The effectiveness of workshops designed to train support workers in how they can assist people with disability to communicate their support needs using participant led videos

Scoping reviews look at research that has already been done to see if it can help our future research projects. Areas we are looking at include:

- Younger people with disability in aged care
- People with disability living in different types of community housing
- What helps ensure quality support for people with disability and complex needs
- Health needs, costs and service utilisation of people with disability

Administrative data projects look at the information collected by organisations like governments, aged care facilities and hospitals. The areas we looked at include:

- Trends in aged care usage by young people over the past 10 years
- The characteristics of young people currently residing in aged care across Australia
- Discharge of young people with disability from rehabilitation facilities
- Pathways into aged care for people aged under 65



## COMPETITIVE RESEARCH GRANTS

In August 2018, the Summer Foundation launched a \$1 million Competitive Research Grants program. It aims to help us work with universities and other institutions on research into how to stop young people going in to aged care.

We received applications from 24 institutions and 8 individual researchers who wanted to work with us.

A panel of independent experts chose 6 projects:

### **Pathways of younger people in aged care**

**Jenni Joenpera, Australian Institute of Health and Welfare.**

Investigates the characteristics, patterns and pathways of people who first entered permanent residential aged care at a younger age.

### **Health needs and service utilisation of NDIS participants: Data linkage, visualisation and research**

**Associate Professor Chris Pearce, Outcome Health.**

Links primary health data and hospital data to explore the health needs and service utilisation (e.g. GP and hospital) of NDIS participants, including young people in aged care facilities.

### **Understanding the characteristics of young people in Victorian hospitals who are admitted from or discharged to residential aged care**

**Dr Renata Morello, Monash University.**

Uses secondary hospital utilisation data to explore the characteristics and hospital utilisation of young people transferred from residential aged care to hospital, or to residential aged care from hospital.

### **READY study: Readying hospitalised patients with disability who need NDIS supports for discharge**

**Professor Michele Foster, Griffith University.**

Examines how hospital discharge planning processes interface with NDIS processes and timelines to better understand the complications, risks and outcomes for patients who require NDIS funded supports on discharge.

### **Understanding the health needs of younger people with disabilities discharged from NSW hospitals to RAC**

**Professor Julian Trollor, University of New South Wales.**

Evaluates hospital admissions data to understand the health needs and outcomes of younger people with disabilities who are discharged from hospitals to residential aged care.

### **PhD Scholarship**

**Simon Guthrie, Macquarie University.**

Modeling the long-term care pathways for people with traumatic brain injury in NSW and Victoria.

## GET BUILDING SDA

THE GET BUILDING SDA INITIATIVE WAS LAUNCHED IN SEPTEMBER 2018. IT'S AIM WAS TO PROVIDE INFORMATION, CONNECTIONS AND RESOURCES TO GET AUSTRALIA BUILDING MORE QUALITY HOUSING FOR PEOPLE WITH DISABILITY.

Get Building SDA is for people looking to build, invest or live in Specialist Disability Accommodation (SDA).

Only a fraction of the SDA that is needed across Australia has been built. We estimate that more than 12,000 new SDA places are needed for people with very high support needs who will receive an SDA payment in their NDIS plans.

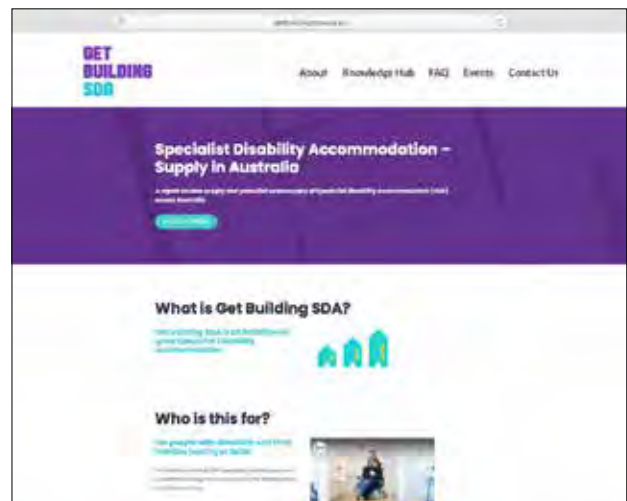
The Summer Foundation partnered with Disability Services Consulting to roll out Get Building SDA in NSW, with the target of getting 75 new SDA builds underway by 2020. It looks like that target will be well and truly exceeded.



We developed a Get Building SDA website that includes a knowledge hub of resources, covering everything from a basic introduction to SDA to tenancing and supporting people in SDA.

During April 2019, more than 300 housing providers and people with disability attended 5 Connecting NSW events in Sydney, Dubbo, Wagga, Penrith and Tweed Heads.

The events showcased early adopters of SDA, built knowledge about SDA eligibility and created connections between housing providers and people with disability.



## NATIONAL CONFERENCE 2019

In March 2019, the Summer Foundation partnered with Youngcare to host the Get Building SDA national conference in Melbourne. More than 400 housing providers, housing seekers, policy makers and service providers attended.

The impressive line-up of 20 speakers and storytellers shared their knowledge, expertise and experiences.

At the conference, the Hon Paul Fletcher, then Minister for Families and Social Services, committed the Australian Government to an Action Plan to halve the number of people with disability aged under 65 entering aged care by 2025, improve NDIS processes for young people in aged care, and increase housing options.

At the conference, the Summer Foundation and Social Ventures Australia also launched the *Specialist Disability Accommodation - Supply in Australia* report, which identified 1,500 new places in development.



# ACHIEVING HER DREAMS

SHANAIS RECENTLY MOVED IN TO ONE OF THE APARTMENTS IN SUMMER HOUSING'S DEVELOPMENT IN FAIRFIELD. SHANAIS IS DELIGHTED TO BE LIVING 7KM FROM THE MELBOURNE CBD.

## **Tell us about your journey to independent living?**

After I finished school I began talking with friends about moving out of home and away from our small town in rural NSW.

It was hard to find accessible housing and supports for my personal care there. We only had group homes or home care, where people came to your home to help with washing and cooking, but not personal care. I would have had to rely on family for personal care. Getting older this was not an option.

I was offered a job in Melbourne. It was a great opportunity but I was wondering how was I going to live in Melbourne. At the same time the NDIS had just come in and I knew it would be possible. It was exciting, I was 22 and a lot more realistic, more aware of my needs, what would work and what wouldn't work. I hoped it would happen and even though my family didn't think it was possible, they were encouraging and supportive.

Then a colleague at work told me about the Summer Foundation. There happened to be an information session the next day, it was such a good coincidence. The information session was for Summer Housing's Cheltenham apartments. It was a bit far from my work in Fairfield and then they said we are building one there. I was so excited.

## **How important were the people around you to achieving your goals?**

Extremely important, especially Mum. She had moved from NSW to be with me until I found somewhere to live. It was so hard getting the funding for supports to live, then also finding somewhere accessible - more than just a wide doorway and no steps, which is what people think is accessible.

Mum did all of my supports, personal care, cleaning cooking and emotional and mental health support. After 2 years it gets really challenging when you haven't found something. Plenty of times "I said, let's just move back home." Mum said, "no this is what you are entitled to and this is what the NDIS is for." She was the main one for me.

I had two support coordinators through the journey - both were really good. They reassured me that the NDIS is about living independently and reaching your goals. I'd reached the goal of working and now needed to live independently. I'm paying my taxes and I'm paying my bills, I just needed help to continue to do that and live independently in the community.

At work they were also really helpful and supportive. I had a lot of meetings and assessments and they were very understanding and flexible and especially with the emotional side.



### **How did you feel when you finally moved in to the apartment?**

So excited, I'm still emotional, I could cry right now. Mum left last week. There are still times when I sit there and go, this is my apartment, I'm not sharing it with Mum or anyone else, it's mine.

I don't think it felt real until Mum left. The first night I was there by myself I was sad and then I said to myself, don't be sad, be excited and proud and so grateful. It's unbelievable.

### **What is the best thing about your life now?**

I'm so happy.

The best thing is being 25 and being able to say I have my own place; I live independently and can go out and do what I want to do; have people over to my apartment for dinner or drinks and just knowing it's my space.

I know that I'm supported and I'm safe and if something does go wrong I have access to 24/7 support. It's life changing.

### **Do you have any advice for others looking to achieve what you have?**

In my first NDIS planning meeting I was very softly spoken, I thought being in a wheelchair it was obvious the types of supports I needed. Now I would go into the meeting more outspoken and I would really detail down to the very last detail, like pressing the button on my toothbrush, opening a bottle of water. You really have to be that specific. It was so draining and humiliating – I try to be positive so I hate having to be negative but it is so hard especially having to detail personal care needs.

Also seek more information from different organisations so you know what is out there.

And hearing about somebody going through this experience and knowing that it can happen would have made it a more optimistic experience.

### **How do you feel about what you have achieved?**

It sounds like a cliché but I'm very proud of what I have achieved, it's hard for PWD to move away from home and live independently. I'm definitely proud and excited.

“

***THE LAST 2 YEARS HAVE BEEN VERY HARD, BUT I FEEL LIKE IT'S ALL BEEN FOR A REASON AND THOSE CHALLENGES HELP ME TODAY TO BE MORE POSITIVE ABOUT THE FUTURE. IF I CAN DO THIS, I CAN DO ANYTHING.***

”



# ***BREAKING OUT OF THE BOX***

LISA IS 43 AND HAS BEEN LIVING IN AGED CARE FOR MORE THAN 6 YEARS. SHE HAS RECENTLY BEEN APPROVED FOR SPECIALIST DISABILITY ACCOMMODATION FUNDING IN HER NDIS PLAN AND IS WORKING TOWARDS MOVING TO HER OWN APARTMENT.

“

***I WANT TO BE INDEPENDENT  
AGAIN – MY INDEPENDENCE  
HAS BEEN STOLEN FROM  
ME AND PUT IN A BOX  
– I WILL BE FREE AGAIN  
AND A NORMAL PERSON.***

”

## **Tell us about your experience trying to get SDA?**

It's been hard. I had to apply for the funding in my NDIS plan – I changed the first goal in my NDIS plan to be to move out of the nursing home in to my own home. My support worker found out about this Specialised Disability Accommodation (SDA) from the Summer Foundation web page.

## **What will the SDA funding mean for you?**

It's a miracle. I had a call to say I had an apartment and I said I was stoked, so I had to get SDA in my plan. I was determined to get it in my plan. It was a lot of stress on me because I didn't know how to go about it. But I've got some supportive people around me who helped to get all the paperwork done.

I couldn't believe it when I got SDA in my plan.

## **What are the things you dislike most about living in aged care?**

My personal care – they never shower me properly and won't listen.

The food – mashed potatoes and carrots and peas, because I'm vegetarian. They would leave a bit of meat there that looks like s\*\*\*.

The screaming and crying – it's all the time... psychologically it has affected me. It makes me anxious to hear the screaming. One lady always cries and I hear what she is saying but the staff just don't understand that she is saying she has a headache and wants a Panadol. I can't categorise them as 1, 2 and 3 – they are all equally bad.



**What advice do you have for others who are living in aged care and want to move out?**

Get help first and get the f\*\*\* out. I never knew how to get help so I just put up with it. The help came from my speech therapist who contacted the Summer Foundation and that's about a year ago. I didn't believe it would happen. Now I hear stories from other people... it was like what I'm going through. Now I believe it will happen.

**What are you looking forward to most about moving out of aged care?**

I want to be independent again – my independence has been stolen from me and put in a box – I will be free again and a normal person.

My independence is important to me, like having a choice on what I'm wearing – I haven't had that option until the NDIS came and I got more supports. And I appreciate it very much. It just the little things – no yelling and crying. I will be safe in my new home.

I've got a lot of stuff here and I can't buy any more because my room's exploding – the nurses whinge I have too much stuff.

The food when I move out will be my choice – my choice has been taken away for so long sometimes I even struggle to know what I want. It's hard to remember that I do know what I like.

“

***...MY CHOICE HAS BEEN TAKEN AWAY FOR SO LONG SOMETIMES I EVEN STRUGGLE TO KNOW WHAT I WANT. IT'S HARD TO REMEMBER THAT I DO KNOW WHAT I LIKE...***

”



# EVERY STORY MATTERS

JESSICA EXPLAINS HOW OUR WORKSHOPS HELPED HER TELL THE AGED CARE ROYAL COMMISSION ABOUT HER EXPERIENCE WITH HER HUSBAND, AGED UNDER 65, IN RESIDENTIAL AGED CARE.

## **What motivated you to attend the Summer Foundation's workshop to help people prepare submissions to the Aged Care Royal Commission?**

I first heard of the Summer Foundation back in 2013 when I was doing an honours thesis project for my undergraduate degree around the topic of young adult survivors of stroke and their experience in residential care. By young adults, I mean people less than 65 years of age.

I had signed up for newsletters from the Summer Foundation and I regularly receive emails from them. One email that particularly caught my eye was one about an upcoming workshop to be held in February 2019 (in Newcastle) to assist people with preparing a submission to the Royal Commission into Aged Care.

At the time I was hesitant about whether I should tell my story, however in the email it had stated that "every story matters" and that they were open to hearing from people with personal experiences. Although I didn't have direct experience living in aged care, I had been a carer for my husband who eventually had to enter residential aged care (RAC) in August 2018, when he was under the age of 65, due to terminal cancer. I responded to the email and was encouraged to come along and share my story.

## **Was there a compelling message you felt the Royal Commission needed to hear?**

My experience of placing my husband into residential care was out of necessity because there were no other age appropriate places for him to be cared for at the end of his life. A great deal of the frustration I feel towards the aged care facility where he was cared for is because I feel there isn't enough registered nurses for each patient to ensure people get their care in a timely way.

I know my husband needed pain relief and he was asking for it himself, so I had to keep on top of that, even when he was in RAC and was often waiting up to 2 hours for there to be 2 nurses to be able to administer the medication that he required for his pain relief at the end of his life. To me it seems more a systemic issue that needs to be addressed with changes to legislation that governs appropriate registered nurse to patient ratios in not just RAC but also hospitals, hospices and other facilities in which people have their care needs met by professionals.



**Would you have made a submission if you had not gone to the workshop?**

To be honest, I probably wouldn't have had the courage to do this without the help of someone else. For me, placing my husband into RAC was one of the hardest decisions in my life so far. I felt so unhappy with the decision to move him into RAC, however knew it was the only option available to me at the time.

When the Summer Foundation was in my local area, it had only been 5 months since my husband had died. I became widowed at only 31 years of age. Widowhood is a life changing milestone that most people don't go through until much later in life. My young age further served to make me feel isolated when I was visiting my husband in RAC. I felt I was the only young person who was visiting her spouse in a place young people shouldn't have to be.

“

***THE RAW EMOTION I FELT...  
...MADE IT DIFFICULT FOR ME  
TO GET MY WORDS ON PAPER.  
I AM VERY GRATEFUL FOR  
THE SUMMER FOUNDATION  
FOR HELPING ME PUT  
SOMETHING TOGETHER.***

***I FEEL I WOULDN'T HAVE HAD  
THE STRENGTH TO DO THIS  
ON MY OWN.***

”

The raw emotion I felt from losing my husband and placing him in RAC made it difficult for me to get my words on paper. I am very grateful for the Summer Foundation for helping me put something together for the Royal Commission as I feel I wouldn't have had the strength to do this on my own.

**Did you get any feedback from the Royal Commission to your submission?**

Yes. I have been contacted by the Office Assisting the Royal Commission. They felt deeply impacted by my story and I have been invited to give evidence at the Royal Commission into Aged Care Quality and Safety as a witness in Melbourne in September 2019.



# THEIR VOICES NEED TO BE HEARD

JAN IS THE DIRECTOR OF A FAMILY-LED ORGANISATION BASED IN CANBERRA, *IMAGINE MORE*, WHICH HAS EMBRACED OUR PARTICIPANT LED VIDEOS PROJECT.

## **What motivated you to get involved with the Participant Led Videos (PLV) project?**

The project aligned really well with Imagine More's Roles Based Recruitment (RBR) project because participants in our project needed to develop an induction for new staff. We were looking for creative induction options and understood the PLV tools and processes would assist us to support people well to develop their own induction video.

## **What do you think about the videos and the process of making them?**

The PLV workshop explained the process and the tools to support making a participant led video really well. The explicit intention for the person with disability to lead, design and share their perspective in the videos was important because it stretched us to find ways for participants' voices to be heard.

We really enjoyed making the videos with each person and most importantly the participants were very pleased with how the final version of their videos looked.

## **Do the videos have a place in your work? How will you use them?**

Assisting people to create a PLV will become part of how we support people through the RBR process, particularly when developing their induction.

## **Having supported a couple of people to make training videos for their support workers (or staff in your case), do you have any advice for others?**

I would recommend people to just have a go at creating a PLV, there is such a broad scope for their use. We learned a lot from just doing it! Take your time in supporting the person to script what they want to say - that way you will have a better chance of creating a succinct and shorter video.

*Jan co-founded Imagine More in 2013 to make sure people with disability could enjoy the good things of life, like being a friend, student, team member, employee, business owner and home-maker.*



# DIRECTORS' REPORT

THE DIRECTORS ARE PLEASED TO PRESENT THEIR REPORT ON SUMMER FOUNDATION LIMITED FOR THE YEAR ENDING 30 JUNE 2019.

## Directors

The names of directors in office at any time during or since the end of the year are:

- Dr Di Winkler
- Professor Malcolm Hopwood
- Paul Conroy
- Benjamin Marks
- Jason Chequer
- Professor Jacinta Douglas
- Graeme Innes AM
- Adam Horsburgh (appointed 1 May 2019)
- Professor Andrew Way (appointed 1 May 2019)

## Principal Activities

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

## Review of Operations

Revenue from continuing activities for the year was \$5,877,449 (2018: \$5,636,271) resulting in surplus funds of \$4,550 (2018: \$490,020). As is common in the not-for-profit sector, funding is in some instances received and revenue recognised for a project prior to work occurring. This results in a mismatch of the timing of revenue and related expenditure. The surplus for the prior period was a direct result of grants and donations received for projects yet to be completed and excludes the \$7,179,290 loss on transfer of the Abbotsford & Belmont Apartments to Summer Housing Limited.

## After Balance Date Events

No matters or circumstances have arisen since the end of the financial period which significantly affected or may significantly affect the operations of Summer Foundation Limited, the results of those operations, or the state of affairs of Summer Foundation Limited in future financial years.





**EXECUTIVE DIRECTOR**

## DR DI WINKLER AM

HonLLD Monash, PhD, GAICD, BAppSc (Occ Ther),  
Grad Dip Neuroscience, Grad Dip AppSc (Comp Sci), MAppSc

Di Winkler is an occupational therapist who has worked with people with severe brain injury for more than 20 years. Di was the Chief Occupational Therapist at Ivanhoe Manor Private Rehabilitation Hospital prior to developing a private practice working with people with brain injury in the community.

Di completed a Masters by Research at La Trobe University entitled "Factors that lead to successful community integration following severe traumatic brain injury". Di established the Summer Foundation in January 2006 and in 2012 completed a PhD at Monash University, which involved a series of studies that focused on young people in nursing homes.

Di sits on the Board of Summer Housing Ltd. She is also the Chief of Research and Innovation at Summer Foundation and an Adjunct Associate Professor at the Living with the Disability Research Centre at La Trobe University.

In November 2013 Di was awarded the 2014 Stanford Australia Foundation Dyson Bequest Scholarship. This scholarship enabled Di to complete the 6 week Stanford Executive Program in 2014. Di was conferred with a Doctor of Laws honoris causa from Monash University in May 2018 for her distinguished service to the community through her leaderships as a practicing Occupational Therapist and researcher with a particular focus of dealing with young people affected by acquired brain injury. In 2019, Di was appointed as a member (AM) of the Order of Australia (General Division) for significant service to people with disability.



**INDEPENDENT NON-EXECUTIVE CHAIRMAN**

## PAUL CONROY

LLB (Hons) Bcom

Paul is an experienced corporate lawyer who was most recently the General Counsel and Company Secretary of Treasury Wine Estates Limited and, prior to that, the Chief Legal Officer and Company Secretary of Fosters Group Limited. Paul is currently the Group CEO of the TIC Group.

Before joining Foster's Group in 2005, Paul held a number of senior management roles with Southcorp Limited in Australia and the United States.

Previously, Paul was the Corporate Development Executive of MYOB Limited, was a corporate lawyer with Herbert Smith Freehills in Melbourne and Hanoi, and also worked in the London office of the international law firm, Mayer Brown, for three years.

Paul is a director of Summer Housing Ltd and FareShare Inc, and a graduate of Leadership Victoria's Williamson Community Leadership Program.





**INDEPENDENT NON-EXECUTIVE DIRECTOR**

## PROFESSOR MALCOLM HOPWOOD

MBBS (1986 MELB), MD, MPM, FRANZC

Professor Mal Hopwood took up the position of Interim Head of Department of Psychiatry at the University of Melbourne in August 2017.

He completed a Doctor of Medicine (MD) at the University of Melbourne in 1997. After working in the public health-care system for many years, he has held the position of Professor of Psychiatry with Ramsay Health Care at the University of Melbourne and Clinical Director, Professorial Psychiatry Unit at the Albert Road Clinic since 2013. His research interests include basic neurobiology and clinical aspects of mood and anxiety disorders, psychopharmacology, mental health care systems and psychiatric aspects of acquired brain injury. As Chief Investigator, he has been awarded current grant funding from the NHMRC, US Department of Defence, Ramsay Health Foundation and ISSCR totalling \$7.8M.

Mal has held a number of roles with the Royal Australian and New Zealand College of Psychiatry (RANZCP). These include a 2-year term as College President (2015-2017) and Victorian Branch Chair (2009-2013). He was a member of General Council (2007-2009) and a member of the Board of Research for 10 years. He is a member of the Faculty of Psychiatry of Old Age and the Section of Neuropsychiatry. From 2009 to 2016 he was Chair of the Board of the Summer Foundation. In 2019, he became President of the Asian Federation of Psychiatric Associations.



**INDEPENDENT NON-EXECUTIVE DIRECTOR**

## BENJAMIN MARKS

BCom, Dip. FP, CFP, MBA

Benjamin Marks is a Partner and Founding Shareholder of Crestone Wealth Management. His primary responsibility is to provide wealth management and investment advice to individuals, families as well as to charitable foundations and not for profit organisations. Benjamin has been a Financial Adviser since 1998 and is a Certified Financial Planner. He also completed his Masters of Business Administration (Melbourne Business School) in March 2015.

During 2011 Benjamin worked on a project for the Summer Foundation and the Housing Demonstration Projects campaign through the Melbourne Business School. The aim of the project was to build a sustainable housing model, whereby new accommodation would be funded by the private sector for individuals living with disability. Benjamin continued to work on this model following the completion of the MBA subject in 2011.

In February 2012, Benjamin joined the Board of the Summer Foundation. He is also on the Board of the Crestone Foundation.

# OUR DIRECTORS



**INDEPENDENT NON-EXECUTIVE DIRECTOR  
RISK & AUDIT COMMITTEE CHAIRMAN**

## JASON CHEQUER

BCom, Dip. FP, ICAA, FPA

Jason is an Executive Director of JBWere, with over 28 years' experience in financial services. During a 21-year career at JBWere, Jason has held various senior positions, including Victorian Manager of Private Wealth Management and National Head of Strategic Wealth Advice.

Through his leadership roles at JBWere, Jason has gained extensive experience in both business strategy development and execution across a range of areas, including product and service development and people management.

Jason takes an active interest in the philanthropic services that JBWere provides to its clients, providing strategic advice to private philanthropists, boards and committees on donor strategies and structuring; investment charters and strategy and the running of private ancillary funds.

Prior to JBWere, Jason worked as a Chartered Accountant for over 6 years with PwC and Arthur Andersen. Jason has had previous experience with the health sector, working on the Investment Sub Committee of the Public Health Association.

Jason is also currently serving as a committee member of the Victorian Adviser Committee of the Family Business Association.



**INDEPENDENT NON-EXECUTIVE DIRECTOR**

## PROFESSOR JACINTA DOUGLAS

B App Sc (Sp Path), M Sc (Psych), PhD (Psych)

Professor Douglas is the Summer Foundation Chair of Living Well with Brain Injury at La Trobe University in the Living with Disability Research Centre.

Jacinta's qualifications span the disciplines of speech pathology, clinical psychology and neuropsychology. She has extensive research and clinical experience in the rehabilitation of adults with acquired brain injury (ABI). Her research contribution is internationally recognised and has advanced knowledge in the domains of interpersonal communication and psychosocial functioning following brain injury. Her work in these areas focuses on maximising the ability of people with brain injury to participate fully in society across all levels of functioning. Jacinta has published more than 120 peer reviewed papers in international journals and authored 12 book chapters.

Since 2014 Jacinta has led the research partnership between La Trobe University and the Summer Foundation. This research program focuses on measurement of the outcomes of interventions related to the lifetime support of people with ABI across the domains of housing, health, and social inclusion.

Jacinta is immediate past president of the Australasian Society for the Study of Brain Impairment (ASSBI). She is a Fellow of ASSBI and the Speech Pathology Association of Australia and is founding co-editor of the journal *Brain Impairment*.

## GRAEME INNES AM

LLB

Graeme Innes was Australia's Disability Discrimination Commissioner from December 2005 to July 2014. During that time he has also served as Australia's Human Rights Commissioner for three and a half years and as Race Discrimination Commissioner for two years.

Graeme is a Lawyer, Mediator and Company Director. He has been a Human Rights Practitioner for 30 years in NSW, WA and nationally.

As Commissioner, Graeme has led or contributed to the success of a number of initiatives. These have included the Same Sex: Same Entitlements inquiry, which resulted in removal of discrimination across federal law; the drafting of the United Nations Convention on the Rights of Persons with Disabilities, and its ratification by Australia.

Graeme was also crucial to the development of the National Disability Strategy and the Disability (Access to Premises – buildings) Standards 2010; as well as the establishment of Livable Housing Australia.

Graeme has also been an active high profile advocate for the implementation of cinema captioning and audio descriptions and, as Human Rights Commissioner, undertook three annual inspections of Australia's Immigration Detention facilities.

Graeme has been a Member of the NSW Administrative Decisions Tribunal; the NSW Consumer, Trader and Tenancy Tribunal; and the Social Security Appeals Tribunal. He has also been a Hearing Commissioner with the Human Rights and Equal Opportunity Commission.

Graeme was Chair of the Disability Advisory Council of Australia, and the first Chair of Australia's national blindness agency, Vision Australia. In 1995 Graeme was made a Member of the Order of Australia (AM). In 2003, he was a finalist for Australian of the Year.

Graeme now works as a non-executive director, serving on this board, and the boards of The State Insurance Regulatory Authority of NSW, Life Without Barriers, The Pricing Regulation Group of the National Disability Insurance Agency, and is Chair of the Attitude Foundation.



**INDEPENDENT NON-EXECUTIVE DIRECTOR**



**INDEPENDENT NON-EXECUTIVE DIRECTOR**

## ADAM HORSBURGH

Adam is the Deputy Chief Executive and Chief Operating Officer of Melbourne Health. He has a strong background in operations health service management, both locally and in the UK, with the NHS.

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

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

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



**INDEPENDENT NON-EXECUTIVE DIRECTOR**

## PROFESSOR ANDREW WAY

Professor Andrew Way is the Chief Executive of Alfred Health. He has held this position since 2009. Prior to this Andrew was based in the UK where he had an extensive career in the NHS, and held the position of CEO of the Royal Free Hampstead NHS Trust.

On his relocation to Melbourne, Andrew cemented his strong health background with a position leading the development of Victoria's first Academic Health Science Centre at Monash Partners, which is now an accredited NHMRC Advanced Health and Research Translation Centre.

In 2015 he was appointed as an Adjunct Clinical Professor in the school of Public Health and Preventative Medicine in the Faculty of Medicine, Nursing and Health Sciences at Monash University. In the 2019 New Years Honours he was awarded a Member of the Order of Australia (AM) for services to clinical research.

He has a strong focus on ensuring and improving access to high quality, safe services, underscored by a strong financial framework and a research-supportive environment.

## Meetings of Directors

The number of meetings the Company's Board of Directors held during the year ended 30 June 2019 and the numbers of meetings attended by each director were:

Director	A	B
Dr Di Winkler	5	5
Prof. Malcolm Hopwood	5	4
Paul Conroy	5	5
Benjamin Marks	5	4
Jason Chequer	5	4
Prof. Jacinta Douglas	5	3
Graeme Innes	5	3
Adam Horsburgh	2	1
Professor Andrew Way	2	2

A = Number of meetings eligible to attend

B = Number of meetings attended



## Committees to the Board

### Finance and Risk Committee

The main functions of the Committee are to develop and implement a risk management strategy, oversee the organisation's finances, examine proposed budgets, review monthly or quarterly management accounts and consider the expenditure authorities delegated to staff. The Committee also works with external auditors to finalise the annual report and conducts periodic reviews of the organisation's financial procedures and legal compliance to ensure proper controls exist to minimise risk exposure.

The following people form this Committee:

- Luke Boshier
- Jason Chequer (Chair)
- Benjamin Marks
- Susane Hammond (Chief Finance & Operations Officer/Company Secretary)

## Auditors' Independence Declaration

A copy of the auditors' independence declaration as required under s.60-40 of the *Australian Charities and Not-for-profits Commission Act of 2012* is set out on page 34.

Signed in accordance with a resolution of the Board of Directors.

A handwritten signature in black ink, appearing to read 'J Chequer', written over a light grey circular background.

Jason Chequer  
Director

Melbourne,  
9 October 2019



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Melbourne VIC 3008  
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Australia

## DECLARATION OF INDEPENDENCE BY RICHARD DEAN TO THE DIRECTORS OF SUMMER FOUNDATION LIMITED

As lead auditor of Summer Foundation Limited for the year ended 30 June 2019, I declare that, to the best of my knowledge and belief, there have been:

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

Richard Dean  
Partner

**BDO East Coast Partnership**

Melbourne, 9 October 2019



# FINANCIAL REPORT

<b>STATEMENT OF PROFIT OR LOSS &amp; OTHER COMPREHENSIVE INCOME</b>	<b>36</b>
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A description of the nature of the company's operations and its principal activities is included in the Directors' Report on page 27, which is not part of these financial statements.

The financial statements were authorised for issue by the directors on 9 October 2019.

This financial report covers Summer Foundation Limited as an individual entity. The financial report is presented in Australian dollars, which is Summer Foundation Limited's functional and presentational currency.

Summer Foundation Limited is a company limited by guarantee, incorporated and domiciled in Australia. Its registered office is:  
c/o Seward Dawson Chartered Accountants  
20 Albert Street, Blackburn VIC 3130

Principal place of business is: Summer Foundation Limited  
Level 3, 991 Whitehorse Road, Box Hill VIC 3128



# STATEMENT OF PROFIT OR LOSS AND OTHER COMPREHENSIVE INCOME

**For the year ended 30 June 2019**

	Notes	2019 \$	2018 \$
<b>Revenue</b>			
Donations		120,414	747,920
Philanthropic grants & projects		4,496,506	4,208,823
Government grants		169,010	155,000
Tenancy selection & support		541,227	193,362
Interest income		4,803	8,216
Management services		-	139,002
NDIS support payments		301,054	37,838
Other income		244,435	146,110
		5,877,449	5,636,271
<b>Expenses</b>			
Non-project employee related expenses		(2,023,652)	(1,991,453)
Project costs		(2,926,984)	(2,008,687)
Event costs		(53,761)	(43,705)
Depreciation & amortisation		(42,078)	(115,459)
NDIS costs		-	(2,040)
Competitive research grant		(257,522)	-
Other costs		(568,902)	(984,907)
Loss on transfer of assets	13	-	(7,179,290)
<b>Surplus/ (Deficit) before income tax</b>		4,550	(6,689,270)
Income tax		-	-
<b>Surplus/ (Deficit) after income tax</b>		4,550	(6,689,270)
<b>Other comprehensive income</b>			
		-	-
<b>Total comprehensive income/ (loss) for the year</b>		4,550	(6,689,270)

The above Statement of Profit or Loss and Other Comprehensive Income should be read in conjunction with the accompanying notes.

# STATEMENT OF FINANCIAL POSITION

**As at 30 June 2019**

	Notes	2019 \$	2018 \$
<b>ASSETS</b>			
<b>Current assets</b>			
Cash and cash equivalents	3	3,262,870	1,981,472
Receivables	4	354,786	914,991
Other assets	5	31,644	20,419
<b>Total current assets</b>		<b>3,649,300</b>	<b>2,916,882</b>
<b>Non-current assets</b>			
Property, plant & equipment	6	283,939	83,713
Intangible assets	7	5,378	962
<b>Total non-current assets</b>		<b>289,317</b>	<b>84,675</b>
<b>Total assets</b>		<b>3,938,617</b>	<b>3,001,557</b>
<b>LIABILITIES</b>			
<b>Current liabilities</b>			
Payables	8	585,048	282,135
Employee provisions	9	267,080	175,684
Deferred revenue	10	540,101	-
Other current liabilities	11	3,400	5,400
<b>Total current liabilities</b>		<b>1,395,629</b>	<b>463,219</b>
<b>Non-current liabilities</b>			
Employee provisions	9	41,269	41,169
<b>Total non-current liabilities</b>		<b>41,269</b>	<b>41,169</b>
<b>Total liabilities</b>		<b>1,436,898</b>	<b>504,388</b>
<b>Net assets</b>		<b>2,501,719</b>	<b>2,497,169</b>
<b>EQUITY</b>			
Accumulated funds		1,759,241	2,497,169
Competitive research grant reserve		742,478	-
<b>Total Equity</b>		<b>2,501,719</b>	<b>2,497,169</b>

The above Statement of Financial Position should be read in conjunction with the accompanying notes.

# STATEMENT OF CHANGES IN EQUITY

**For the year ended 30 June 2019**

	Competitive Research Grant Reserve	Accumulated funds	Total
	\$	\$	\$
Balance as at 1 July 2017	-	9,186,439	9,186,439
Deficit for the year	-	(6,689,270)	(6,689,270)
Balance as at 30 June 2018	-	2,497,169	2,497,169
Balance as at 1 July 2018	-	2,497,169	2,497,169
Reallocation between reserves	1,000,000	(1,000,000)	-
Surplus for the year	-	4,550	4,550
Competitive research grant expenditure	(257,522)	257,522	-
Balance as at 30 June 2019	742,478	1,759,241	2,501,719

The above Statement of Changes in Equity should be read in conjunction with the accompanying notes.

# STATEMENT OF CASH FLOWS

**For the year ended 30 June 2018**

	Notes	2019 \$	2018 \$
<b>Cash flows from operating activities</b>			
<i>Receipts</i>			
Donations		120,414	747,920
Philanthropic grants		4,496,506	4,208,823
Government grants		169,010	155,000
Other receipts		1,986,032	288,418
Interest received		4,803	8,216
Rent received		-	67,046
<i>Payments</i>			
Suppliers & employees		(5,450,163)	(4,728,081)
<b>Net Cash inflow from Operating Activities</b>		<b>1,326,602</b>	<b>747,342</b>
<b>Cash flows from investing activities</b>			
Payments for property, plant and equipment	6	(242,595)	(51,626)
Payments for intangible asset		(8,318)	-
Net proceeds from Housing Demonstration Projects Fund		5,709	-
<b>Net Cash outflow from Investing Activities</b>		<b>(245,204)</b>	<b>(51,626)</b>
<b>Cash flows from financing activities</b>			
Repayment of borrowings		-	(679,630)
Repayment from/(loan to) Summer Housing		200,000	(200,000)
<b>Net Cash (inflow)/outflow from financing activities</b>		<b>200,000</b>	<b>(879,630)</b>
<b>Net increase/(decrease) in cash and cash equivalents</b>		<b>1,281,398</b>	<b>(183,914)</b>
Cash and cash equivalents at the beginning of the financial year		1,981,472	2,165,386
<b>Cash and cash equivalents at the end of the financial year</b>	3	<b>3,262,870</b>	<b>1,981,472</b>

The above Statement of Cash Flows should be read in conjunction with the accompanying notes.



# NOTES TO THE FINANCIAL STATEMENTS

## 1. Summary of significant accounting policies

### (a) Basis of preparation

Summer Foundation Limited applies Australian Accounting Standards – Reduced Disclosure Requirements as set out in AASB 1053: Application of Tiers of Australian Accounting Standards and AASB 2010-2: Amendments to Australian Accounting Standards arising from Reduced Disclosure Requirements.

The financial report is a general purpose financial report that has been prepared in accordance with Australian Accounting Standards and Interpretations of the Australian Accounting Standards Board and the *Australian Charities and Not-for-profit Commission Act 2012*. The company is a not-for-profit entity for financial reporting purposes under Australian Accounting Standards.

Australian Accounting Standards set out accounting policies that the AASB has concluded would result in financial statements containing relevant and reliable information about transactions, events and conditions. Material accounting policies adopted in the preparation of these financial statements are presented below and have been consistently applied unless stated otherwise.

### Historical cost convention

The financial report, except for the cash flow information, has been prepared on an accruals basis and is based on historical costs, modified where applicable, by the measurement at fair value of selected non-current assets, financial assets and financial liabilities. The amounts presented in the financial statements have been rounded to the nearest dollar.

### New or amended Accounting Standards and Interpretations adopted

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

The adoption of these Accounting Standards and Interpretations did not have any significant impact on the financial performance or position of the company.

The following Accounting Standard and Interpretation is most relevant to the company:

### AASB 9 Financial Instruments

The company has adopted AASB 9 from 1 July 2018. The standard introduced new classification and measurement models for financial assets. A financial asset shall be measured at amortised cost if it is held within a business model whose objective is to hold assets in order to collect contractual cash flows which arise on specified dates and that are solely principal and interest. A debt investment shall be measured at fair value through other comprehensive income if it is held within a business model whose objective is to both hold assets in order to collect contractual cash flows which arise on specified dates that are solely principal and interest as well as selling the asset on the basis of its fair value. All other financial assets are classified and measured at fair value through profit or loss unless the entity makes an irrevocable election on initial recognition to present gains and losses on equity instruments (that are not held-for-trading or contingent consideration recognised in a business combination) in other comprehensive income ('OCI'). New impairment requirements use an 'expected credit loss' ('ECL') model to recognise an allowance. Impairment is measured using a 12-month ECL method unless the credit risk on a financial instrument has increased significantly since initial recognition in which case the lifetime ECL method is adopted. For receivables, a simplified approach to measuring expected credit losses using a lifetime expected loss allowance is available.

## **Impact of adoption**

AASB 9 was adopted using the modified retrospective approach and as such comparatives have not been restated. There was no impact on opening retained profits as at 1 July 2018.

## **Comparatives**

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

## **(b) Revenue recognition**

Revenue is measured at the fair value of the consideration received or receivable.

Revenue from contributions and donations are recognised in the year in which they are received.

Government contributions and grants are recognised in the year the Company obtains control of the right to receive the contributions.

## **Interest income**

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

## **(c) Income tax**

The company is exempt from income tax under subsection 50-5 of the *Income Tax Assessment Act 1997*.

## **(d) Cash and cash equivalents**

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

## **(e) Receivables**

Receivables are initially recognised at fair value and subsequently measured at amortised cost using the effective interest method, less any allowance for expected credit losses. Receivables are due for settlement no more than 30 days from the date of recognition.

Collectability of trade receivables is reviewed on an ongoing basis. Debts which are known to be uncollectable are written off. The company has applied the simplified approach to measuring expected credit losses, which uses a lifetime expected loss allowance. To measure the expected credit losses, receivables have been grouped based on days overdue.

## **(f) Plant and other equipment**

Plant and other equipment comprising fittings and furniture are initially recognised at acquisition cost, including any costs directly attributable to bringing the asset to the location and condition necessary for it to be capable of operating in the manner intended by the Company. This is subsequently measured using the cost model being, cost less subsequent depreciation and impairment losses.

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

Subsequent costs are included in the asset's carrying amount or recognised as a separate asset, as appropriate, only when it is probable that future economic benefits associated with the item will flow to the Company and the cost of the item can be measured reliably. All other repairs and maintenance are charged to the Statement of Profit or Loss and Other Comprehensive Income during the financial period in which they are incurred.

The depreciation rates used for each class of depreciable assets are

<b>Class of fixed asset</b>	<b>Depreciation Rate</b>
Computer equipment	5% – 33.33%
Furniture and fittings	5% – 25%

The assets' residual values and useful lives are reviewed, and adjusted if appropriate, at each reporting date. An asset's carrying amount is written down immediately to its recoverable amount if the asset's carrying amount is greater than its estimated recoverable amount. Gains and losses on disposals are determined by comparing proceeds with carrying amount. These are included in the Statement of Profit or Loss and Other Comprehensive Income.

### **(g) Intangible assets**

Intangible assets are recorded at cost less accumulated amortisation and impairment. Amortisation is charged on a straight line basis over their estimated useful economic lives. The estimated useful economic life and amortisation method is reviewed at the end of each annual reporting period, with any changes in these accounting estimates being accounted for on a prospective basis. The following useful lives are used in the calculation of amortisation:

Software: 2 years

### **(h) Fair value estimation**

The fair value of financial assets and financial liabilities must be estimated for recognition and measurement or for disclosure purposes.

The nominal value less estimated credit adjustments of trade receivables and payables are assumed to approximate their fair values. The fair value of financial liabilities for disclosure purposes is estimated by discounting the future contractual cash flows at the current market interest rate that is available to the Company for similar financial instruments.

### **(i) Payables**

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

### **(j) Goods and Services Tax**

Revenues, expenses and assets are recognised net of the amount of associated GST except for the following:

- Receivables and Payables are stated inclusive of GST
- Where GST is not recoverable from the Australian Taxation Office

In these circumstances the GST is recognised as part of the cost of acquisition of the asset or as part of an item of expense.

### **(k) Employee benefits**

Provision is made for the Company's liability for employee benefits arising from services rendered by employees to reporting date. Employee benefits expected to be settled within one year together with benefits arising from wages, salaries and annual leave which may be settled after one year, have been measured at the amounts expected to be paid when the liability is settled plus related on costs. Other employee benefits payable later than one year have been measured at the net present value. Statutory contributions are made by the Company to defined contribution superannuation funds and are charged as expenses when incurred.

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

The preparation of the financial statements requires management to make judgements, estimates and assumptions that affect the reported amounts in the financial statements. Management continually evaluates its judgements and estimates in relation to assets, liabilities, contingent liabilities, revenue and expenses. Management bases its judgements, estimates and assumptions on historical experience and on other various factors, including expectations of future events, management believes to be reasonable under the circumstances. The resulting accounting judgements and estimates will seldom equal the related actual results. The judgements, estimates and assumptions that have a significant risk of causing a material adjustment to the carrying amounts of assets and liabilities (refer to the respective notes) within the next financial year are discussed below.

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

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

### **Employee benefits provision**

As discussed in note 1(k), the liability for employee benefits expected to be settled more than 12 months from the reporting date are recognised and measured at the present value of the estimated future cash flows to be made in respect of all employees at the reporting date. In determining the present value of the liability, estimates of attrition rates and pay increases through promotion and inflation have been taken into account.

	2019	2018
	\$	\$

## **3. Current assets – Cash and cash equivalents**

Cash at bank and on hand	2,360,392	981,472
Restricted funds	902,478	1,000,000
	3,262,870	1,981,472



	2019	2018
	\$	\$

#### 4. Current assets – Receivables

Debtors	132,566	704,722
Accrued Revenue	222,220	-
Summer Housing Ltd Loan	-	200,000
GST Receivable	-	10,269
	354,786	914,991

#### 5. Current assets – Other Assets

##### Current

Prepayments	31,644	20,419
	31,644	20,419

#### 6. Non-current assets – Plant & Equipment

##### Computer Equipment

Computer Equipment – at cost	258,360	192,868
Less: accumulated depreciation	(173,673)	(146,156)
	84,687	46,712

##### Furniture & Fixtures

Furniture & Fixtures – at cost	60,938	54,453
Less: accumulated depreciation	(22,914)	(17,452)
	38,024	37,001

##### Leasehold Improvements

Leasehold improvements – at cost	4,841	4,841
Less: accumulated depreciation	(4,841)	(4,841)
	-	-

##### Buildings

Buildings – at cost	-	7,633,725
Less: accumulated depreciation	-	(454,435)
Transfers to Summer Housing	-	(7,179,290)
	-	-

## 6. Non-current assets – Plant & Equipment (continued)

	2019	2018
	\$	\$
<b>Rapid Housing Prototype (under construction)</b>		
Rapid Housing Prototype – at cost	161,228	–
	161,228	–
<b>Total Plant &amp; Equipment</b>	<b>283,939</b>	<b>83,713</b>

### Reconciliation

Reconciliation of the carrying amounts of each class of plant and equipment at the beginning and the end of the financial period are set out below:

	Computer Equipment	Furniture & Fittings	Rapid Housing (under construction)	Total
	\$	\$	\$	\$
<b>Carrying Amount as at 30 June 2018</b>	46,712	37,001	–	83,713
Additions	74,882	6,485	161,228	242,595
Disposals	(4,719)	–	–	(4,719)
Depreciation Expense	(32,188)	(5,462)	–	(37,650)
<b>Carrying Amount as at 30 June 2019</b>	<b>84,687</b>	<b>38,024</b>	<b>161,228</b>	<b>283,939</b>

## 7. Non-current assets – Intangible assets

### Software

Software – at cost	33,603	25,285
Less: accumulated amortisation	(28,225)	(24,323)
<b>Total Intangible Assets</b>	<b>5,378</b>	<b>962</b>

### Reconciliation

Reconciliations of the carrying amounts of intangible assets at the beginning and the end of the financial period are set out below:

	Software
	\$
<b>Carrying amount at 30 June 2018</b>	<b>962</b>
Additions	8,318
Disposals	–
Amortisation expense	(3,902)
<b>Carrying amount at 30 June 2019</b>	<b>5,378</b>

## 8. Current Liabilities – Trade & Other Payables

	2019	2018
	\$	\$
Trade payables	214,244	167,899
Sundry creditors & other payables	370,804	114,236
	585,048	282,135

The company had no interest bearing liabilities at 30 June 2019 (2018: nil).

## 9. Employee Provisions

Current employee provisions		
– Annual Leave	178,905	120,859
– Long Service Leave	88,175	54,825
	267,080	175,684
Non-current employee provisions		
– Long Service Leave	41,269	41,169
<b>Total employee provisions</b>	<b>308,349</b>	<b>216,853</b>

## 10. Deferred Revenue

NDIS grants in advance	481,701	–
Tenancy Matching commitments in advance	58,400	–
	540,101	–

## 11. Other Current Liabilities

Allen Martin Research Scholarship	3,400	5,400
	3,400	5,400

## 12. Related Party Transactions

### (a) Key Management Personnel

Key management personnel are the Chief Executive Officer and the directors of the company.

Other than Luke Boshier (Chief Executive Officer appointed 16 April 2018), Di Winkler (Executive Director) and Graeme Innes (Non-executive Director), no director has received compensation during the years ended 30 June 2019 and 30 June 2018. This includes short-term benefits, post-employment benefits, other long-term benefits, termination benefits or share based payments.

Aggregate remuneration	332,244	160,949
------------------------	---------	---------

**(b) Transactions with related parties**

Entities related to Director Di Winkler have provided donations of \$3,760,000 (2018: \$3,620,498). In addition, the company has entered into an office lease agreement with an entity related to Director Di Winkler for \$1 per annum for a seven-year lease term.

**(c) Finance facilities from related parties**

Entities related to Director Di Winkler have provided a finance facility (Summer Foundation Housing Matching Business Unit Loan) of \$500,000 (2018: \$nil). At year end, none of this facility had been drawn.

**13. Loss on Transfer of Assets**

Summer Foundation gifted the Abbotsford and Hunter properties to Summer Housing in December 2017, resulting in a loss on transfer of assets of \$7,179,290 for the year ended 30 June 2018.

Summer Housing Ltd was established in January 2017 as an independent entity to Summer Foundation Ltd to replicate and scale the initial housing demonstration projects developed by Summer Foundation, building on the proven success of the Abbotsford and Hunter Housing Projects.

**14. Contingencies**

The company has no contingent liabilities as at 30 June 2019 and 30 June 2018.

**15. Operating Lease Commitments**

	2019	2018
	\$	\$
Payable – minimum lease payments		
– not later than 12 month	9,439	1
– later than 12 months but not later than 5 years	17,305	3
	26,744	4

The operating lease commitment is in relation to the property lease for the Box Hill premises (expiring on 5 October 2022) and a leased printer (expiring on 22 May 2022).

**16. Competitive Research Grant**

The company has a commitment to the University of NSW for a research project totaling \$402,190 that commences 1 July 2019 and spans 3 years. \$160,000 of the project amount has been invoiced and recognised as a trade payable. The remaining portion will be paid once work commences, which is in line with the contract that has been entered into with the University of NSW.

**17. Events occurring after the reporting date**

No matters or circumstances have arisen since 30 June 2019 which significantly affected or may significantly affect the operations of Summer Foundation Limited, the results of those operations, or the state of affairs of Summer Foundation Limited in future financial years.

# DIRECTORS' DECLARATION

In the directors' opinion:

- (a) the financial statements and notes set out in pages 36 to 47, are in accordance with the *Australian Charities and Not-for-profit Commission Act 2012* including:
  - (i) complying with Australian Accounting Standards – Reduced Disclosure Requirements, the *Australian Charities and Not-for-profits Commission Regulation 2013*, and other mandatory professional reporting requirements; and
  - (2) giving a true and fair view of the company's financial position as at 30 June 2019 and of its performance for the financial year ended on that date; and
- (b) there are reasonable grounds to believe that the company will be able to pay its debts as and when they become due and payable.

This declaration is made in accordance with a resolution of the directors.

Signed in accordance with a resolution of the Board of Directors.



Jason Chequer  
Director

Melbourne, 9 October 2019



## INDEPENDENT AUDITOR'S REPORT

To the members of Summer Foundation Limited

### Report on the Audit of the Financial Report

#### Opinion

We have audited the financial report of Summer Foundation Limited (the registered entity), which comprises the statement of financial position as at 30 June 2019, the statement of profit or loss and other comprehensive income, the statement of changes in equity and the statement of cash flows for the year then ended, and notes to the financial report, including a summary of significant accounting policies, and the directors' declaration.

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

- (i) Giving a true and fair view of the registered entity's financial position as at 30 June 2019 and of its financial performance for the year then ended; and
- (ii) Complying with Australian Accounting Standards - Reduced Disclosure Requirements and Division 60 of the *Australian Charities and Not-for-profits Commission Regulation 2013*.

#### Basis for opinion

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

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

#### Other information

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

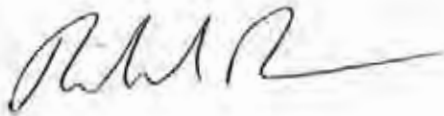
Our opinion on the financial report does not cover the other information and accordingly we do not express any form of assurance conclusion thereon.

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

## DECLARATION OF INDEPENDENCE BY RICHARD DEAN TO THE DIRECTORS OF SUMMER FOUNDATION LIMITED

As lead auditor of Summer Foundation Limited for the year ended 30 June 2019, I declare that, to the best of my knowledge and belief, there have been:

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



Richard Dean  
Partner

**BDO East Coast Partnership**

Melbourne, 9 October 2019

WITH THANKS

# OUR SUPPORTERS

THE SUMMER FOUNDATION WARMLY THANKS  
THE ORGANISATIONS AND INDIVIDUALS THAT  
HAVE SUPPORTED OUR WORK THROUGH  
GRANTS, FUNDRAISING AND IN-KIND SUPPORT.

## Corporate support

National Australia Bank  
Oscar Building  
Rotary Club of Mont Albert & Surrey Hills  
Sigma Healthcare  
Social Ventures Australia  
Stretchy Tech  
Workplace giving donors through Good2Give

## Trusts and Foundations

The Cranwell Family Trust No.2  
Equity Trustees  
The Goodridge Foundation  
Jack Brockhoff Foundation  
Michaela Arnott Foundation  
National Disability Services - Innovative Workforce Fund  
Rees Family Foundation  
W.C.F. Thomas Charitable Trust  
William Buckland Foundation

## Donors and Bequests

Alexandra Wood  
Darren Wilcox  
David Lipshut  
Diane & Graham Cowley  
Fotini & Gareth Canterford  
Mark Hooper  
Michael Dalton  
Patricia Hurley

## Government support

National Disability Insurance Agency  
NDIS Quality and Safeguards Commission  
Department of Social Services (Commonwealth)  
Department of Attorney General (Commonwealth)  
Department of Health & Human Services (Vic)  
Transport Accident Commission (Vic)  
Department of Human Services (SA)  
Department of Industry (NSW)  
Department of Housing & Public Works (Qld)  
Department of Health (Qld)  
Department of Communities (Tas)



## PUBLICATIONS AND PRESENTATIONS

### Reports

Bigby, C., Douglas, J., and Iacono, T. (2018). Enabling mainstream systems to be more inclusive and responsive to people with disabilities: Hospital encounters of adults with cognitive disabilities. Report for the National Disability Research and Development Agenda.

Oliver, S.B., Gosden-Kaye, E.Z., Jarman, H.K., Winkler, D., and Douglas, J.M. (2019). A scoping review to explore the experiences and outcomes of younger people with disabilities in residential aged care facilities: Interim Report. Melbourne, Australia: Summer Foundation.

Specialist Disability Accommodation – Supply in Australia (2019). Summer Foundation and Social Ventures Australia.

### Journal articles

Jamwal, R., Callaway, L., Farnworth, L. and Winkler, D. (2018). Electronic assistive technology use in Australian shared supported accommodation: rates and user characteristics. *Disability and Rehabilitation: Assistive Technology*. 13:634-40.

Jamwal, R., Enticott, J., Farnworth, L., Winkler, D. and Callaway, L. (in press, accepted 8 Oct 2018). The use of electronic assistive technology for social networking by people with disability living in shared supported accommodation. *Disability and Rehabilitation: Assistive Technology*.

McEwen, J. Bigby, C., and Douglas, J. (in press, accepted 2 March 2019). Moving on from quality assurance: exploring systems that measure both process and personal outcomes in disability services. *Journal of Policy and Practice in Intellectual Disabilities*.

D'Cruz, K. Douglas, J. and Serry, T. (in press, accepted 22 February 2019). Narrative storytelling as both an advocacy tool and a therapeutic process: Perspectives of adult storytellers with acquired brain injury. *Neuropsych Rehabilitation*.

Douglas, J. (in press, accepted 21 Jan 2019). Loss of friendship following traumatic brain injury: A model grounded in the experience of adults with severe injury. *Neuropsychological Rehabilitation*.

Douglas, J. (2018). 'The things that help, the things that get in the way': Working together to improve outcome following acquired brain injury, presidential address. *Brain Impairment*. 19:258-269.

Carney, T., Then, S., Bigby, C., Wiesel, I. and Douglas, J. (2019, accepted 11 Oct 2018). National Disability Insurance Scheme Plan Decision-making: Or when Tailor-made case planning met Taylorism & the algorithms? *Melbourne University Law Review*, 42(3).

Then, S., Carney, T., Bigby, C. and Douglas, J. (2018). Supporting decision-making of adults with cognitive disabilities: The role of Law Reform Agencies – Recommendations, rationales and influence. *International Journal of Law and Psychiatry*, 61:64-75.

Barry, S., Knox, L. and Douglas, J. (2019) "Time's up": The experience of entering residential aged care for young people with acquired brain injury and their families, submitted. *Brain Impairment*. 20:24-36.

Douglas, J. and Bigby, C. (in press, accepted 5 July 2018). Development of an evidence-based practice framework to guide decision making support for people with cognitive impairment due to Acquired Brain Injury or intellectual disability. *Disability and Rehabilitation*.

D'Cruz, K., Douglas, J. and Serry, T. (2019). Personal narrative approaches in rehabilitation following traumatic brain injury: A synthesis of qualitative research. *Neuropsychological Rehabilitation*. 29:985-1004.

Honan, C.A., McDonald, S., Tate, R., Ownsworth, T., Togher, L., Fleming, J., Anderson, V., Morgan, A., Catroppa, C., Douglas, J., Francis, H., Wearne, T., Sigmundsdottir, L. and Ponsford, J. (2019). Outcome instruments in moderate-to-severe adult traumatic brain injury: recommendations for use in psychosocial research. *Neuropsychological Rehabilitation*. 29:896-916.

### Submissions to government

SDA Limited Cost Assumptions Review – our submission focused on changes to the SDA rules so that families can live together in SDA.

Review of the National Disability Agreement – our submission emphasised the need to include targets and accountability mechanisms for reducing the number of Young People in Residential Aged Care.

Joint Parliamentary Standing Committee on the NDIS Market Readiness Inquiry – our submission focused on market and supply issues facing people with complex disability and support needs.

DHHS (Vic) Disability Action Plan.

NSW Parliament Inquiry into the NDIS and the provision of disability services in NSW.

Australian Building Codes Board Accessible Housing Options Paper.  
DSS Thin Markets Project.

### Opinion Pieces

Taleporos, G. (Sept 2018), Get us out, Every Australian Counts, News Hub.

Paul, P. (Oct 2018), The NDIS is a critical support for younger people in aged care, LinkedIn.

Douglas, J. (Oct 2018), Time's up: issues faced by young people in residential aged care, ProBono Australia.

Finis, C. (November 2018), Learning from lived experience, LinkedIn.

Paul, P. (November, 2018), Upskilling NDIS support coordinators, LinkedIn.

Finis, C. (January 2019), Every story matters, LinkedIn.

Taleporos, G. (March 2019), Are we getting action – or just more talk? Every Australian Counts, Opinion.

Bo'sher, L. (June 2019). Being a true believer, DSC podcast.

## Conferences and presentations

Douglas, J. (July 2018). Understanding friendship following TBI: A mixed method study. International Neuropsychological Society, Mid-year Meeting, Prague.

Bo'sher, L. (July 2018). Parliamentary inquiry into NDIS readiness.

Finis, C. July (2018). Sigma Gala Dinner and Awards Night, Melbourne.

Bo'sher, L. (August 2018). PowerHousing Disability Community of Practice, Canberra.

Bo'sher, L. (Sept 2018). The support coordinator's role in investigating housing, CareChoice NDIS seminar webinar.

Bo'sher, L. (Sept 2018). Housing, participant choice and 'reasonable and necessary' support, Outside the Box Conference, Sydney.

Bucolo, C. (Sept 2018). Innovative Workforce Fund projects – PLV, Outside the Box Conference, Sydney.

Bucolo, C. & Finis, C (Sept 2018). Stall – Participant Led Video, Outside the Box Conference, Sydney.

Lockwood, A. (Sept 2018). Occupational Therapy Universal Design Conference, Brisbane.

Bo'sher, L. (Nov 2018). QShelter-Summer Foundation SDA forum.

Bucolo C. (Nov 2018). Participant Led Videos, Workforce Impact Collective: Gathering Collective Momentum: people, ideas and resources, Canberra.

Bucolo, C. (Nov 2018). 6th National Brain Injury Conference, Brisbane.

Bo'sher, L. (Dec 2018). Digital pioneers in social and affordable housing, AHURI Disrupting the housing market conference, Hobart.

Worsnop, T. (Dec 2018). Delivering NDIS Specialist Disability Accommodation, Perth.

Bo'sher, L. (Feb 2019). UpSkill launch, Victoria.

Bo'sher, L. (Feb 2019). AHURI discussion series – Is social housing infrastructure?

Lockwood, A. (Feb 2019). 'Pausefest', OT Conference, Melbourne.

Bo'sher, L. (March 2019). Get Building SDA National Conference. Melbourne.

Bo'sher, L. (March 2019). GBSDA Supply in Australia, report launch, Melbourne.

Bucolo, C. (March 2019). DSC SDA Forum, Sydney.

Bucolo, C. (March 2019). Panel – Who is the SDA Target Market for? Summer Foundation Get Building SDA National Conference, Melbourne.

Winkler, D., Douglas, J. and Jamwal, R. (March 2019). Outcomes & impact of new SDA. Get Building SDA National Conference, Melbourne.

Worsnop, T. (March 2019). DSC SDA Forum, Brisbane.

Zakharov, R. and Worsnop, T. (March 2019). PowerHousing Australia Operations Group, Melbourne.

Bo'sher, L. (April 2019). NDIS Housing and NHRIC Roundtable, Brisbane.

Worsnop, T. (April 2019). NDIS Implementation Taskforce (ITF) Participant Needs and Mainstream Interface Working Group, Melbourne.

Bucolo, C. (May 2019). 'How To' Session Participant Led Videos. ASSBI Conference, Wellington, NZ.

D'Cruz, K., Douglas, J. and Serry, T. (May 2019). Humanising healthcare: understanding the potential of narrative storytelling. ASSBI Conference, Wellington, NZ.

Douglas, J., Bigby, C. and Iacono, T. (May 2019). Enabling hospitals to be more inclusive and responsive to people with cognitive disabilities. ASSBI Conference, Wellington, NZ.

Winkler, D. and Douglas, J. (May 2019). Integrated apartments for people with disability: Individual experience and outcomes. ASSBI Conference, Wellington, NZ.

Winkler, D., Douglas, J., D'Cruz, K., Bucolo, C. and Finis, C. (May 2019). Co-design, pilot and evaluation of Participant Led Videos to train support workers, ASSBI Conference, Wellington, NZ.

Douglas, J., Winkler, D., D'Cruz, K., Bucolo, C. and Finis, C. (June 2019). Development and evaluation of participant led videos to train support workers of people with severe acquired brain injury. WFNR Neuropsychological Rehabilitation Symposium, Granada, Spain.

Bo'sher, L. (June 2019). CPA Australia Annual Public Sector Engagement Lunch, Are royal commissions the new normal for developing complex public policy?

Bo'sher, L. (June 2019). NDIS and SDA, Australian Catholic Housing Alliance.

Bo'sher, L. (June 2019). NDIS for hospital executives and managers: Streamlining interface issues between health and the NDIS.



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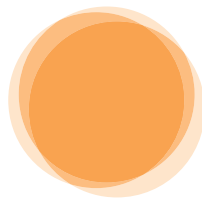
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