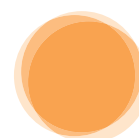


BUILDING BETTER LIVES
FOR YOUNG PEOPLE
IN NURSING HOMES

SUMMER FOUNDATION

ANNUAL REPORT
2020/2021



SUMMER
FOUNDATION



757

SUPPORT COORDINATORS
AND ALLIED HEALTH STAFF
ATTENDED UPSKILL WORKSHOPS

1,177



PEOPLE ATTENDED
45 HOUSING OPTIONS
EVENTS IN WESTERN
AUSTRALIA AND
QUEENSLAND

643

PEOPLE REGISTERED
FOR OUR ANNUAL
PUBLIC FORUM



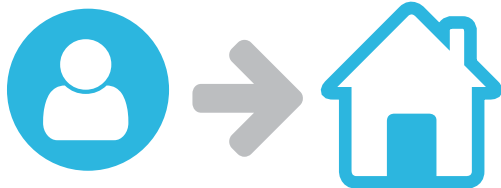
118,653

PEOPLE VISITED THE
HOUSING HUB WEBSITE



268,025

HOUSING HUB LISTING VIEWS

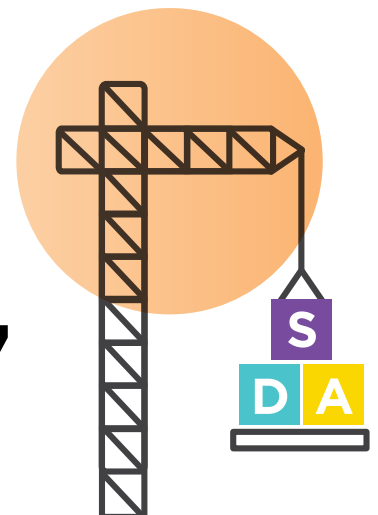


264

TENANTS MATCHED WITH SDA

1,817

SDA PLACES IN
DEVELOPMENT



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4,106

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



About the Summer Foundation

The Summer Foundation was established in 2006 to stop young people being forced to live in aged care.

Young people with disability must have the support they need to be able to choose where they live and who they live with – just like everyone else.

During the 2020-2021 financial year our work has focused on 3 key areas:

- Building the capacity around housing options for people with disability in their housing searches
- Building the capacity of those providing services
- Advocating for the policy changes and implementation needed to ensure young people with disability can have choice and control over their housing

In this report you can read about our work in these areas and about some of the projects we completed. These include the SDA Explainer for Investors, which supports impact investors to make informed decisions about investing in the SDA market; tools for discharge health professionals to help them understand a person's housing needs and preferences; and our Welcome Home online education package for SDA providers.

The Housing Hub and our continuing strong research program are also featured.

Of course, it is the results of our work in seeing young people moving out of aged care that really count – Jono, Paulene and Pamela tell their stories of how they have achieved their housing goals.

Our board has continued to evolve. Our sincere thanks to departed Independent Non-Executive Director Benjamin Marks for his invaluable contribution and welcome to new Non-Executive Directors Selina Short, Caro Llewellyn and Cain Beckett.

Thanks also to Summer Foundation staff, our Board and all those who worked with us during the year. The collaborative efforts of all involved with the Summer Foundation continue to drive us towards our goal of stopping young people being forced to live in aged care.



A stylized handwritten signature in black ink.

Paul Conroy
Chairman



The issue: Young people in aged care

In Australia, more than 4,000 people aged under 65 are living in aged care because there is nowhere else for them.

The issue is complex and crosses multiple settings and sectors, including hospitals, housing, disability and primary health.

Young people end up in aged care when disability and health services don't work together in a timely way.

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.

The issue of young people in aged care will be resolved when the systems, policy settings and markets consistently enable people with disability to live where, how and with whom they choose; experiencing choice and control equal to people without disability.

15

**YOUNG AUSTRALIANS
ENTER AGED CARE
EVERY WEEK***

***BETWEEN MARCH 2020 AND MARCH 2021**

Our Goals

Our overarching goal is to ensure systems, policy settings and markets consistently enable people with disability to live where, how and with whom they choose, with choice and control equal to people without disability.

Our goal will be achieved when these outcomes across 3 strategic priorities are realised:

- Housing
- Preventing new admissions to Residential Aged Care (RAC)
- Aged care



Housing

NDIS participants with complex support needs can readily access a range of housing options which align with their needs and preferences.



Preventing new admissions to RAC

NDIS participants with complex needs in hospitals are supported to successfully return to community living, where and how they choose. The services, supports and workforce to maintain community living are available and well skilled.



Aged care

The only young people living in RAC are there due to exceptional circumstances, it is an informed choice, and they are connected to effective NDIS plans which they are supported to implement.

How we work

Our strategy is to influence, challenge and build capacity of the systems, policies and markets that need to change; to permanently eliminate the need for young people with disability to live in aged care.

We focus on unique, high impact interventions that complement the efforts of government, relevant sectors, markets and other organisations.

The Summer Foundation uses the following tools:



Clinical experience

We use clinical experience that tells us what is happening on the ground to develop and share resources and tools designed to build the capacity of the system and market users.



Evidence base

Our research informs the development and evaluation of potential solutions, resources and tools.



Demonstration projects or social enterprises

We design, test, evaluate and improve potential solutions and market interventions to develop social enterprises.



Expert knowledge from lived experience

We build on the expert knowledge from those with lived experience of the issue of young people in aged care to inform, co-design and evaluate our resources, tools and interventions.



Knowledge of government agenda and drivers

We leverage our knowledge of government drivers to establish best practice policy, to facilitate understanding and implementation of policy and inform government agenda.

Highlights

The Summer Foundation exists to stop young people with disability being forced to live in aged care.

People with disability must have access to the support they need to be in control of where and how they live and who they live with.

This means we need to take a multi-faceted approach in our work – to empower people with disability in their housing searches; to build the capacity of those providing services; and to influence the governments making the critical systems and funding decisions.



Supporting people with disability

Our work to support people with disability to find the housing that is right for them centres around the Housing Hub, including the Tenancy Matching Service and the Housing Hub website.

The new-look Housing Hub website is a platform connecting housing seekers and providers of accessible accommodation. Nearly 120,000 people visited the website in the 2020-21 financial year.

Since its inception, the Tenancy Matching Service supported 540 NDIS participants to explore their housing options, with 264 of them offered Specialist Disability Accommodation (SDA) places.

We support people with disability to explore the housing options that are possible under the NDIS with a range of resources, information sessions and workshops. More than 1,000 people attended Housing Hub workshops last year and about 1,000 attended workshops and events as part of our Housing Options project in Queensland and Western Australia.

For more information about the Housing Hub, see page 14.



Service providers

The ability of service providers to ensure people with disability have access to the supports they need to live in the way they want is crucial.

Our UpSkill program continued to focus on building the capacity of support coordinators and allied health professionals who play a pivotal role in supporting NDIS participants in their housing options. More than 750 attended UpSkill workshops in 2020-21.

Two major projects featured in our work with the health sector to improve hospital discharge processes so young people with disability are not discharged to aged care.

Through the Housing Brokerage Service, established in the early days of the COVID-19 pandemic, we provided secondary consultation to support discharge planners to secure housing for 112 patients with disability stuck in hospital – you can find out more on page 12. And we launched a Housing Needs and Preferences to Support Discharge tool (see page 11).



Housing sector

Building the capacity of the housing sector is vital to foster and maintain the development of accessible housing.

We produced an SDA Explainer for Investors to support investors to make informed decisions about investing in the SDA market (see page 10) and we delivered our third SDA Supply in Australia report that showed 1,817 SDA places in development across the country (see page 15).

Our Welcome Home package of compliance education resources for registered providers of SDA was launched in May and continues with online training modules and webinars (see page 11).

Housing providers attended many of our housing options events and the Housing Hub website includes a wealth of information for providers of SDA.



Gathering and sharing knowledge

Providing an evidence base is at the foundation of all our work. Our Research Team last financial year published 8 studies in peer reviewed journals including an international scoping review on individualised housing to provide an evidence base for SDA.

The expert knowledge that can only come from lived experience is being harnessed through our newly appointed lived experience facilitators and associates. They contributed to a range of projects, resources and submissions to government.

Staying Connected is a featured page on the new Summer Foundation website where those with experience of living with disability can share their stories and find opportunities to feel more supported, empowered and connected.

For the first time our Annual Public Forum was an online event with more than 600 people signing up.



Our influence

We use the knowledge gained to advocate for the policy change and implementation that is needed to ensure people with disability can choose where they live and who they live with.

In the 2020-21 financial year we made submissions to government on independent assessments, support coordination, Supported Independent Living, Medium Term Accommodation and accessible housing.

You can see all submissions and resources in our digital library here: summerfoundation.org.au/resources

Projects



SDA Explainer for Investors

In December the Summer Foundation released its SDA Explainer for Investors to support impact investors to make informed decisions about investment in the SDA market.

The publication provides analysis of the SDA demand and supply outlook as well as investment principles relating to the quality of new dwellings, the tenant selection process, disability support and ensuring the investment is set up for long-term positive social impact.

It comes at a time when there has been a significant progression from impact investment being primarily for philanthropists with an interest in a particular sector to it being seen as a viable option for mainstream investment banks, super funds and private sector investors. One of the limiting factors to the growth of impact investment in Australia is the lack of products that have capacity for investment at scale, but the SDA market is well positioned to leverage this private capital.



Online a winning formula

We delivered our first online Annual Public Forum in 2020.

The online format allowed greater participation than in the past, with more than 600 people registering to celebrate "Finding our way home: Navigating the journey to SDA".

The forum brought together people with disability, policy makers and sector professionals.

Liz Ellis, Jonathan Bredin (read his story on page 18) and Lisa Corcoran shared their journeys that now see them settled in their own SDA apartments.

Forum participants also heard from NDIA General Manager Provider and Markets, Gerrie Mitra, Disability Discrimination Commissioner, Ben Gauntlett, Guardian Living CEO, Justin Nix, disability reform consultant, Toni Rowe and the Summer Foundation's General Manager Housing, Alecia Rathbone.



Welcome Home online education package

The Summer Foundation's Welcome Home education package for SDA providers was launched in May.

The package is designed to help SDA providers understand their obligations under the SDA Practice Standards and explore a rights-based approach to service delivery.

The free, self-paced learning provides a comprehensive explanation of the SDA Practice Standards and includes 6 training modules, management tools, factsheets, policy guides, videos and podcasts.

A series of webinars is also part of the package. Ten people attended the first online workshop.

The project, which was funded by the Support for the NDIS Providers Program, administered by the NDIS Quality and Safeguards Commission, attracted 184 enrolments in the first 2 months.



Housing Needs and Preferences to Support Discharge

The Housing Needs and Preferences to Support Discharge Guide and Template for health professionals was launched in April.

The resource is the first step in finding housing and moving patients with disability along the hospital discharge pathway more efficiently.

By understanding a person's housing needs and preferences, health teams can assist people with disability to exercise real choice and control over the type of housing they live in, where they live and who they live with.

The guide and template give health staff a structured and goal-focused process towards understanding a person's housing needs and preferences.

The guide and template were developed as part of a project between the Summer Foundation and Queensland Health.



Housing Brokerage Service

In April 2020, the Summer Foundation launched the Housing Brokerage Service in response to COVID-19. The service is designed to support the discharge of people with disability from hospital into housing that is aligned with their housing needs and preferences. The service aims to build the capacity of professionals working with people with disability who are stuck in hospital and in need of more suitable housing.

The Housing Brokerage Service works to identify suitable housing options that are aligned with a person's needs and preferences. Using a rights-based approach, the service incorporates principles of choice, control and inclusion for people with disability.

The process involves gathering the person's formal and informal support team together for a housing needs and preferences conference, which drives a conversation to understand the person's support needs and housing preferences. In 2020-21, 65 conferences took place.

A tenant summary profile is then created and used in the housing search. This is sent to housing providers who may be able to offer housing.

Throughout the 2020-21 year, the Housing Brokerage Service received 74 referrals from 44 hospitals across Victoria, New South Wales, South Australia, Western Australia and Queensland. We conducted housing searches and provided assistance with SDA and SIL applications for 64 people.



Building Better Homes

The Summer Foundation led the Building Better Homes campaign that successfully saw the introduction of mandatory accessibility standards in the National Building Code.

State and federal building ministers agreed that all new housing will be required to meet minimum accessibility standards, including at least 1 step-free entrance, wider internal doors and corridors and a toilet at ground or entry level from September 2022.

The Summer Foundation was one of the 70-strong group of peak bodies and agencies that worked together on the campaign, including a petition that was signed by more than 17,000 people.

National surveys of people with mobility impairment and occupational therapists (OTs) about housing accessibility features were also conducted by the Summer Foundation and La Trobe University.

The survey of OTs found that more than 40% of clients had a delayed discharge from hospital while they waited for home modifications to be completed. This resulted in each person spending an extra 20 days in hospital, at an estimated cost of between \$1.7 billion and \$3.2 billion a year.



Housing Hub



The Summer Foundation's Housing Hub social enterprise supports people with disability to find a place to live that is right for them.

It incorporates the Housing Hub website, workshops and an SDA phone line to provide information about housing options and a Tenancy Matching Service (TMS) to connect housing seekers and providers of accessible housing.

A new version of the Housing Hub website was launched in August 2020 and saw huge growth in the number of people with disability and housing providers accessing it.

The new version of the website also includes pages with information for support coordinators and occupational therapists, as well as pages for people with disability and families about things like SDA and Individualised Living Options (ILO).

We created 13 resources. More than 55,000 users accessed our resource pages.

The TMS was scaled to support more SDA eligible people to move into new SDA. We worked with 743 applicants – across New South Wales, Queensland, Southern Australia, Victoria, Western Australia and the ACT – resulting in 264 people with disability receiving offers of tenancy from SDA providers.

We launched the Housing Hub SDA Advice Line in November 2020 and up to June 30 provided individual advice to 840 callers.

The work of Lived Experience Facilitators and Associates in the Housing Hub team brought an invaluable depth of knowledge to our work. The facilitators and associates contribute to our projects and resources, facilitate housing workshops and provide valuable, real-world experience that other people with disability and families can relate to and learn from.

Online training and information sessions were the norm during the height of the COVID-19 pandemic in Australia. Nearly 1,000 attendees received information on housing options at our workshops.



**OVER
120,000
PROPERTY SEARCHES**



**MORE THAN
55,000
USERS ACCESSED OUR
RESOURCE PAGES**

Data snapshots

During the year the Housing Hub published the first 2 of its 6-monthly Housing Seeker and Listings Snapshots to inform the SDA market.

The Housing Seeker Snapshot summarises 6 months of data from over 1,500 housing seeker profiles and more than 60,000 searches on the Housing Hub.

The Listings Snapshot details the types of properties being listed on the Housing Hub with information about the housing providers creating the listings. It also reviews top performing listings to show the elements of the Housing Hub that can be used to reach housing seekers.

SDA Supply Survey

Our third annual Specialist Disability Accommodation – Supply in Australia report was released in January 2020.

The report, based on a survey of 57 SDA developers in October and November 2020, provides an update on the growth of SDA supply across Australia and shares insights into market sentiment.

It shows continuing strong growth in the supply of SDA – with 1,817 SDA places in development – but indicates growth across states and territories is not uniform.

The major cities on Australia's east coast are home to most of the identified pipeline of SDA with encouraging growth in the supply of SDA in Adelaide and Perth. There is limited development of SDA in Tasmania and no pipeline of SDA was identified in the Northern Territory.



All Housing Hub resources and reports can be found here: housinghub.org.au/resources

Research program



The Summer Foundation Research Program aims to build an understanding of the issue of young people in aged care and the associated systems and pathways.

By researching the pathways that lead young people into aged care, as well as the housing options for those who wish to leave, we can provide the evidence needed to create systems change that will help solve this problem. Our in-house research is conducted in partnership with La Trobe University through Emeritus Professor Jacinta Douglas.

We source the evidence we need to inform policy and practice related to the issue of young people in aged care in a range of ways.

Most of our projects fall into 3 categories:

1. Scoping literature reviews help us understand the systems that result in young people going into aged care and being left there. We learn what others have tried in the past and what has worked. This helps us design pilots and prototypes.

To date, we have reviewed international literature on:

- Experiences of younger people living in aged care
- Outcomes of individualised housing for people with disability and complex needs
- Smart home technology to support independent living for people with disability
- Health needs and service use by people with disability and complex needs
- Discharge planning from hospital for people with severe acquired disability and for people with complex support needs
- Factors that influence the quality of paid support for adults with acquired neurological disability

2. Administrative data projects allow us to unlock the full potential of existing data collected by organisations like governments, aged care facilities and hospitals. We partner with data custodians and data scientists to clean and manipulate large datasets, combine data from different systems, make deeper insights and reach data informed conclusions.

Areas we look at include:

- Evaluation of population trends of young people in residential aged care
- Pathways of younger people into aged care
- Young people discharged to aged care from rehabilitation hospitals in Australia
- Primary health needs and service utilisation of people with disability

3. Primary data projects are a key part of our work as it enables people with disability, close others, and support workers to tell us directly about their needs, preferences and outcomes, and the impact of the NDIS, pilot projects and prototypes. We also conduct research on the need for accessible housing in Australia and the National Construction Code (NCC), as well as surveys of SDA providers and analyses of SDA market supply data.

COMPLETED PROJECTS INCLUDE:

- ✓ Surveys of occupational therapists and people with mobility impairments to provide evidence on the need for accessible design features in new homes and impact decision makers on the NCC
- ✓ SDA market analysis of housing supply data
- ✓ Scoping review on outcomes of individualised housing for people with disability
- ✓ Scoping review on smart home/communication technology for people with disability
- ✓ Analysis of aged care data

Our ongoing studies focus on:

- The hospital discharge planning process
- Outcomes for people with disability moving into new housing
- Support, technology and built design in housing for people with disability
- Trends analysis of administrative data on young people in aged care
- NDIS plans and scheme sustainability
- SDA eligibility and market data

All our research output including recent peer reviewed journal articles and reports can be found here: summerfoundation.org.au/research-library

In addition to our in-house research program, the Summer Foundation partners with a range of researchers and institutes across Australia. Our research partnerships were enhanced with the \$1 million Competitive Research Grant initiative, which was set up in 2018. Under these grants, the Summer Foundation established a range of new partnerships with universities and institutions who have data science expertise and access to relevant data assets. Six projects were progressed or completed as part of the Competitive Research Grant program.

Australian Institute of Health and Welfare

TOPIC: Pathways of younger people in aged care

PROGRESS: Complete

Griffith University

TOPIC: READY study: Readyng hospitalised patients with disability who need NDIS supports for discharge

PROGRESS: Complete

Macquarie University

TOPIC: Modelling the long-term care pathways for people with acquired neurological injury in NSW and Victoria (PhD scholarship)

PROGRESS: Data requests approved

Monash University

TOPIC: Characteristics, service utilisation and pathways of young people in Victorian hospitals who are admitted from, or discharged to, residential aged care

PROGRESS: Journal manuscripts under review

Outcome Health

TOPIC: Primary health needs and service utilisation of people with disability

PROGRESS: NDIA data received; linkage and analysis commenced

University of NSW

TOPIC: Understanding the health needs of younger people with disabilities discharged from hospital to RAC

PROGRESS: Manuscript drafted



IN 2020/2021 THE
RESEARCH TEAM
WORKED ON:



**7 SCOPING LITERATURE
REVIEWS**



**4 ADMINISTRATIVE DATA
PROJECTS**

11 PRIMARY DATA PROJECTS

For more information about our research program:
summerfoundation.org.au/about-us/our-research

Making his dreams a reality – Jono's story

Jono's journey to SDA has taught him you have to fight not only for what you require but also for what you deserve.

Tell us about yourself.

I'm a 31-year-old man who has Cerebral Palsy (CP). I get around in a wheelchair and communicate with a tablet. I am living the life I always dreamt of because I took control and made things happen!

My pastimes include playing poker, computer games, PlayStation 4 and chess. I love to watch sports, particularly ice hockey. "Go, Melbourne Mustangs!" I've travelled both interstate and overseas. As soon as borders are open I am heading to South America.

I am passionate about showing the world that people with disability live a regular life.



Can you describe your housing journey?

As a young adult I had dreams like most people – to work, to travel and to have my own home. Coming into adulthood, I began feeling cramped living with my family and I needed my privacy, as well as a space that felt like my own.

One day in 2015 my boss asked me if I was interested in moving out of home. He told me about 6 specialist units that were being built in Frankston. I drove by the site to check it out and discovered that they were being built with some home automation features. I knew it was the right fit for me. Immediately, I began harassing the Department of Human Services with weekly emails pleading with them to select me for a unit.

Around 8 months later, I was accepted for one of those units and moved in April 2016. I was on cloud 9, my journey of living independently was about to begin. It was an exciting, yet scary experience. I went from receiving round the clock care at home from mum, to having no idea who would support me day-to-day in this new living arrangement.

The complex was equipped with 24/7 staff support. Although there weren't allocated times for support, I could just text staff when I required assistance.

It was a great first step, but after 3 years, I was ready for my next adventure and a higher level of independence.

Once I had a clear vision of what I wanted, it was about finding the right people to help make it happen. The Summer Foundation was my first point of contact. I spoke to them about my living arrangement, and what I was looking for moving forward. With my needs in mind, they shared information about apartments that were being built and talked me through the set up. I was all in.

In December 2019, I was offered an apartment on the basis that I get the right SDA funding in my NDIS plan.

“ It doesn't stop me from being actively involved in the community. I do not, and have not, let anything stop me from reaching my goals. ”

After almost a year of organising and waiting, in November of 2020, I moved into my apartment in Docklands, Melbourne. This is the dream, and it is one of the best decisions I have made.

How does it feel now to be living in your new SDA home?

It's coming up to 10 months since I moved into my new apartment in Docklands, Melbourne. The importance of living in a place that truly feels like home to you is priceless to most people. This new apartment is the first to make me feel that way.

Living in SDA has given me the opportunity to choose my own support workers for daily supports.

Any advice for other people hoping to move to SDA?

Since I moved out of my family home I have realised you must fight for what you not only require but deserve. My journey to living in SDA wasn't without setbacks and I definitely had to fight my way here. I encourage people to ask for assistance from those around them – without having people around me who wanted to assist me to achieve my goals, I wouldn't be here right now.

You're a blogger, public speaker and self advocate – how do you maintain the momentum?

I am an avid writer and I publish weekly blogs about living with complex disability on my website. I am also a public speaker and enjoy sharing my experiences with others. I want to show the world that even though I have a complex disability I still live an ordinary life. If you want to keep up to date on my life and opinions then head to jonathanbredin.com.au

“ This is the first time in my life that I have had this level of control over who provides my support. Having this choice and control has been life changing. ”



Starting a new chapter – Paulene's story

Moving into her own SDA apartment after 6 years living in aged care has been a life changing experience for Paulene.

This time last year you were living in RAC, how did you cope with moving during a pandemic?

Yes, I moved through the pandemic. I was just so happy to get out because when you are in aged care during that time they lock up everything and you're only allowed in your kitchen or to go outside a little bit.

The move was good. We were allowed to move all the stuff because my room was next to the door to go outside. They parked the truck there and I was able to move everything - that was a really good day.

I couldn't believe it was happening. I was so excited, I couldn't wait to get everything out of my room, just to get everything in there (the truck) so I could get out. It was such a good feeling - the start of a new beginning, a new chapter in my life.



How did you manage to decorate your apartment so beautifully?

In the morning after breakfast I'd go to the windows and look outside and visualise how I wanted my apartment to look...so I knew what to order straight away. I did most of my ordering while in RAC - it was interior designing on the phone. I bought pillows, crockery, everything, they were all stacked in boxes in my room.

I'd think I need a nice small clock so would look up the web for crystal wall clock - it passed the time in aged care and the workers would ask me what I was looking at, it was a conversation.

When did your SDA apartment start to feel like home to you?

I looked at every room, I thought this is mine no one can take this away from me. I know it sounds clichéd, but I felt like a new woman, a new life, a new beginning, it was exciting, I felt like everything from here on was going to be just great.

I love living here, I love the lights at night time, I just feel very good. Where I live is awesome, it's perfect, I wouldn't have it any other way. I'm in the heart of the city, I have everything I need all around me.

Mum says wouldn't you move, I say no way. I've always worked in the city, the city is my home, it's where I'm most comfortable. I feel at ease, I feel relaxed, this is where I belong.

Were there aspects of living independently that worried you?

No, not all. I've got great carers and one carer worked in RAC with me so she came with me. I felt so comfortable, I thought everything is going to go smoothly, they know what to do. I had no worries whatsoever.

My girls (support workers) are my angels.

“ I couldn't believe it was happening. I was so excited ...It was such a good feeling - the start of a new beginning, a new chapter in my life. ”

What are the differences between living in RAC and your new SDA home?

The support workers are there just for you, they work with you and for you. If you talked to a carer in aged care they would say they had to go and see someone else. Now they are here just for me and don't have to go somewhere else.

What is the best thing about your life now?

I can do what I want, when I want and how I want. I can be my own person - I say what goes, I make my own choices. I'm free like a butterfly.

Do you have advice for others thinking about making this move?

Tell your support coordinator that you want to live independently, do all the paperwork, do what you have to to get out of aged care. It's all up to you, no one can make the decision for you, you need to speak up.

Have good support around you - people to inspire, people 100% behind you with what you want. Having my Mum and sisters behind me made me feel better.

This year you have also contributed to the work of Summer Foundation, how has that experience been?

It feels good. You feel very important and you feel like you're doing something good for someone else. It feels good that others want to know what you feel about things, and that your answers are valued by other people.

If I can help anyone it makes me feel like I've achieved something, I've done something good.

“ I can do what I want, when I want and how I want. I can be my own person - I say what goes, I make my own choices. I'm free like a butterfly. ”



New opportunities – Pamela's story

Pamela Dean is a Lived Experience Partner with the Summer Foundation. She worked with our TAC project that developed resources to support people to move out of aged care and group homes.

Tell us about yourself?

I'm a trained scientist and worked within the university sector as a researcher and lecturer. I was diagnosed with MS in 2009, which mostly behaved itself until 2016 when my illness became a lot more aggressive. I ended up in hospital, rehab hospital and then a group home on the advice of health professionals. Once I was in the group home I had to retire from Monash Uni as I simply could not undertake my working role properly, so I decided to retire.



It is lovely to have recently had the opportunity to apply myself again working with the Summer Foundation.

I love reading, listening to podcasts, spending time with friends and my cat, and gardening.

How did you feel about moving from the group home into an SDA apartment?

I was quite nervous about it; I wasn't sure I could physically cope. I was used to the model of always having staff around me and sort of an institutionalised setting, so it was a big adjustment.

I was concerned whether I would get help when I needed it. When living in a group home with all the staff around, you can't comprehend how it can be different.

Moving to SDA was quite challenging. There was a lot to do moving in, setting up the apartment with furniture and training staff and getting to know on-site staff. Also getting to know the local area, moving all my services, and changing my address with service providers and organising with them whether they could frequent the areas and whether it was safe for them to visit. A lot of work from the get-go ...but it was definitely worthwhile.

What was it about the TAC project that interested you?

I liked the option of applying for a job and being involved in a project working with a team, as well as the opportunity to work in my current disability status.

What experience/skills were you able to bring to the project?

I'm very good at coming up with novel ideas, I had previously worked in the learning area. I was a Subject Matter Expert and content developer and also have the lived experience of looking for SDA while having a disability.

“ I hope that other people can make a more informed choice and have a bit of confidence in making such a decision. ”

What do you hope the resources can do for others making this transition?

I hope that other people can make a more informed choice and have a bit of confidence in making such a decision.

**What did you enjoy about the project?
What did you take away from the project?**

I enjoyed being part of a team, working towards something that would have a social outcome. And being involved in more work and not giving up on my working capability.

The Summer Foundation definitely did their best to make the working environment inclusive for people with disability, they helped to make the project work within the confines of our working capabilities, and I appreciated that.

**You moved during the project
– how did it compare working from
your group home to working in your
SDA home?**

It was near impossible to work in the group home – there were just too many other people who were a distraction, continually wanting your attention so I couldn't focus my mind on working.

Once I moved to the SDA apartment it was good to be able to have the time to focus and concentrate on reading and applying myself. I feel that my mind has improved, my cognition has improved.

**What would you say to others thinking
about contributing to the work of Summer
Foundation?**

If you believe you can do it you should do it.
I hope that the resources will help others facilitate their future decisions.

“ Moving to SDA was quite challenging. There was a lot to do moving in, setting up the apartment ...A lot of work from the get-go ...but it was definitely worthwhile. ”



See the resources here: [summerfoundation.org.au/
new-tools-to-help-people-move-out-of-aged-care](https://summerfoundation.org.au/new-tools-to-help-people-move-out-of-aged-care)

Our people

**A huge thanks to
all of the full time,
part time and casual
team members that
contributed to the
impact of the Summer
Foundation in 2020/21.**

Alana Dobra
Alecia Rathbone
Alison Burgess
Alison Pettit
Amelia Condi
Andrea Lockwood
Antony Brown
Ashley Bennallack
Belinda Aitken
Bram Heinrich-McPartlan
Brandon Shrubshall
Brendon Woolf
Brigid O'Flaherty
Carla Granozio
Carmen Dzurban
Carolyn Finis
Cathy Bucolo
Chloe Simpson
Claire Lovegrove
Cornelia Wellecke
Dale Lee
Daniel Potenza
Dayanna Torres
Di Winkler
Dianne Trevisan
Donna Wakim
Elise Davis
Elizabeth Beadle
Elizabeth Everard
Ella-Rose Minter

Emily Gosden-Kaye
Emma Butler
Emma Gee
Emma Newby
Eric Chen
Eugene McCrory
Eve Roseingrave
Gail Parker
George Taleporos
Gill Hilton
Gina Fall
Glenda Bishop
Gunnar Jeffery
Hannah Jarman
Heidi Fleming
Helen Cronin
Helen Jeisman
Hitesh Sharma
Isabella Goodwin
Jacinta Douglas
Jacqui Naismith
Jamie-Lee Dwyer
Janet Eades
Janine Harrison
Jennifer Merriman
Jesse Camilleri
Jessica Simms
Jessie Lewis
Joanna Stewart
Joanne Mear
Jocelyn Geary
Jodie Gallacher
Jonathan Bredin
Julia Spehar
Julian Ambrose
Julie Gibson
Kaitlyn King
Karen Fankhauser

Karen Goddard
Karina Dobra
Kate D'Cruz
Kelly Aguirre
Kelly Chait
Kerrie Lord
Kirby Littley
Leah Jeskie
Lee Cubis
Libby Ellis
Libby Witts
Linda Hughes
Liz Ellis
Liz Kooyman
Liz Williams
Lou Pethick
Louise Bradley
Louise Dixon
Lydia Dockrill
Manodya Kathriarachchi
Marcus Oliver
Maria Ellensohn
Mariam Matta
Mark Brown
Matthew Ryan
Matthew Welwood
Megan Miles
Megan Topping
Melanie Schlaeger
Melissa Efstathiou
Melody Carbarns
Meryn Shaw
Monique de Costa
Nadia Di Girolamo
Natalie Koufos
Natalie Rinehart
Natasha Hendricks
Natasha Street

Neomi Dsouza
Neroli Padfield
Nicholas Kormas
Nicole Aimers
Olga Elia
Pamela Dean
Penny Paul
Penny Stevenson
Peter Mulherin
Rebecca Evans
Rebecca Jamwal
Rhiannon Martin
Robin Ramme
Rosalyn Roberts
Rosie Beaumont
Ryan Bayley
Samantha Petersen
Shanais Nielsen
Sholeh Rutstein
Sinead McKee
Sophie Moore
Stacey Oliver
Stephanie Liddicoat
Stephanie Press
Susan Northway
Suzanne Currie
Tamsin Wilson
Teigen Bywater
Tom Butler
Tom Greaves
Tricia Quirk
Veronica Moya
Victoria Illingworth
Vince Patton
Virginia Mitsch
Vivien Mathews
Wishna Gunaratnam
Zoe Shearer

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

Norton Rose Fulbright
Sigma Healthcare
Workplace giving donors through Good2Give
Holding Redlich

Trusts and Foundations

The Cranwell Family Trust No.2
Equity Trustees
Gandel Philanthropy
Michaela Arnott Foundation
Rees Family Foundation
State Trustees
W.C.F. Thomas Charitable Trust
William Buckland Foundation
The Grace and Emilio Foundation
Paypal Giving Fund
Bowness Family Foundation
James Frizelle Charitable Foundation

Donors and Bequests

Alexandra Wood
Darren Wilcox
David Lipshut
Diane and Graham Cowley
Fotini and Gareth Canterford
Mark Hooper
Patricia Hurley
Ivanka Gale
Greg Thomas
John Weterkamp
Matthew Dunn

Government support

NDIS Quality and Safeguards Commission
Department of Social Services (Commonwealth)
Department of Health and Human Services (Vic)
Transport Accident Commission (Vic)
Department of Health (Qld)
Wellbeing SA
Department of Jobs Precincts and Regions (Vic)

Directors' report

The directors present their report, together with the financial statements, on the company for the year ended 30 June 2021.

Directors

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

- Dr Di Winkler AM
- Paul Conroy
- Benjamin Marks (retired 26 May 2021)
- Jason Chequer
- Professor Jacinta Douglas
- Adam Horsburgh
- Dean Ireland
- Selina Short (appointed 17 November 2020)
- Caro Llewellyn (appointed 17 November 2020)
- Cain Beckett (appointed 26 May 2021)

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 \$12,875,028 (2020: \$9,207,020). This represents a 40% increase on 2020, due to the growth in our philanthropic and government grants and donations. COVID-19 related government grants and subsidies of \$662,000 were comparable with 2020, with JobKeeper payments ceasing in September 2020.

A surplus result of \$1,690,577 (2020: \$961,959) was achieved in 2021. This material surplus is a result of anticipated 2021 research and project expenditure being delayed until 2022 as well as donation income received and recognised in the financial year 2021, but designated to support activities in the financial year 2022. Under the revenue standards (AASB 15 and AASB 1058) the nature of this income requires it be recognised on receipt, not as spent, resulting in a mismatch between the timing of the revenue recognition and the related expenditure.

Matters subsequent to the end of the financial year

No matter or circumstance has arisen since 30 June 2021 that has significantly affected, or may significantly affect the company's operations, the results of those operations, or the company's state of affairs in future financial years.

Information on Directors



**CEO, Founder and
Executive Board Member**

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 twenty 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 established the Summer Foundation in January 2006 after becoming frustrated by the lack of appropriate housing and support for young people with disability who were being admitted to nursing homes for the aged.

In 2018, Di was conferred with a Doctor of Laws honoris causa from Monash University for her distinguished service to the community through her leadership as a practicing occupational therapist and researcher. In 2019, Di was appointed as a member (AM) of the Order of Australia (General Division) for significant service to people with disability.

Di is the Chief Executive Officer at the Summer Foundation and leads the Research Unit. She has authored 28 peer-reviewed journals and is an Adjunct Associate Professor at the Living with Disability Research Centre at La Trobe University. Di also sits on the Board of Summer Housing Ltd.



**Independent Non-Executive
Chairman**

PAUL CONROY

LLB (Hons) Bcom

Paul Conroy is an experienced corporate lawyer and is the Chief Operating Officer at food rescue charity FareShare.

He was previously the CEO of the TIC Group and has recently held the roles of General Counsel and Company Secretary of Treasury Wine Estates Limited and Chief Legal Officer and Company Secretary of Fosters Group Limited.

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 3 years.

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



**Independent Non-Executive
Director
Risk & Audit Committee
Chairman**

JASON CHEQUER

BCom, Dip. FP, ICAA, FPA

Jason Chequer is a Partner at Sayers, a modern advisory and investment business built for the new economy.

Jason supports his clients in their pursuit of best practice investment and family stewardship strategies. He works with both private companies and families seeking to pursue social and environmental goals alongside financial goals.

Jason has more than 28 years' experience working in financial services, advising some of Australia's most successful family enterprises and holding senior wealth management leadership roles.

Jason is an active participant in community and for-purpose organisations. He is a non-executive board member of the Inclusion Foundation and a member of Family Business Australia.

Prior to Sayers, Jason had a successful 22-year career at JBWere, advising multi-generational families, entrepreneurs, family business enterprises and for-purpose organisations.

Before JBWere, Jason was a chartered accountant, working for over 6 years with PricewaterhouseCoopers and Arthur Andersen.



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.

Professor Jacinta Douglas is Emeritus Professor at La Trobe University. She is a former 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.

In March 2014, a \$3 million partnership between La Trobe University and the Summer Foundation was announced. This research program is being led by Jacinta, and measures the outcomes of interventions related to the lifetime support of people with ABI and neurological conditions such as MS and Huntington's Disease.

Jacinta is a Fellow of the Australasian Society for the Study of Brain Impairment and the Speech Pathology Association of Australia and is founding co-editor of the multidisciplinary journal Brain Impairment.



**Independent Non-Executive
Director**

ADAM HORSBURGH

BA (Hons), MSoCSc, Post Grad Dip in Health Services
Management

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

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

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

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



**Independent Non-Executive
Director**

DEAN IRELAND

BCom, Master of Marketing

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

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

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

Dean holds a Bachelor of Commerce from the University of Melbourne, a Master of Marketing from Melbourne Business School and formally qualified as a chartered accountant.

He is a non-executive director of Melbourne Business School and of a not-for-profit microfinance provider, Opportunity International.



**Independent Non-Executive
Director**

SELINA SHORT

BEC, Master of Commerce, Diploma of Education, Certificate in Disruptive Strategy (Harvard Business School)

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

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

Selina joined EY in 2009 and before that worked for DTZ in London as part of the Global Capital Markets Exec team where she managed international investor strategy.

Selina is a member of the Property Council of Australia's National Cities Roundtable and the Property CEO Champions of Change, a group of 21 CEOs leading action to enhance gender equality in real estate.



**Independent Non-Executive
Director**

CARO LLEWELLYN

Authentic Leadership (Harvard Business School)

Caro Llewellyn is CEO of the Wheeler Centre for Books, Writing and Ideas - centrepiece of Melbourne's status as a vibrant UNESCO City of Literature - and is dedicated to championing the transformative power of conversation and informed public debate.

As the former artistic director of several large-scale literary festivals, including the Sydney Writers' Festival, the PEN World Voices Festival chaired by Salman Rushdie in New York, and an international literary festival for Columbia University's campus in Paris, she has worked with many of the most distinguished writers and brightest thinkers of our time.

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

Caro is a specialist in authentic leadership and engagement, diversity and communications in the business, cultural, educational, and not-for-profit sectors.



Independent Non-Executive Director

CAIN BECKETT

BEcon, Master of International Studies, Fellow Australian Institute of Company Directors

Cain Beckett is a senior executive in the Department of the Prime Minister and Cabinet and leads the department's internal consulting unit, the Policy Projects and Taskforces Office.

Cain previously held leadership roles with the National Disability Insurance Agency (NDIA), where he led NDIS pricing and the development of Specialist Disability Accommodation (SDA). Cain is also now an NDIS participant.

Prior to government, Cain's career spanned diverse executive roles across fiduciary services and consulting. He has also led or co-founded successful organisations in the fields of technology consulting, media and medical research.

Cain is a former Chair of the NSW Disability Council and former non-executive director of Cerebral Palsy Alliance.



Meetings of directors

The number of meetings of the company's Board of Directors ('the Board') held during the year ended 30 June 2021, and the number of meetings attended by each director were:

Director	E	A
Dr Di Winkler	5	5
Paul Conroy	5	5
Benjamin Marks	5	5
Jason Chequer	5	5
Prof. Jacinta Douglas	5	4
Adam Horsburgh	5	5
Dean Ireland	5	5
Selina Short	3	3
Caro Llewellyn	3	3
Cain Beckett	1	1

E = Eligible to attend **A** = Attended

Committees to the board

Finance and Risk Committee

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

The following people form this Committee:

- Jason Chequer (Chair)
- Dean Ireland

Contributions on winding up

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

The total amount that members of the company are liable to contribute if the company is wound up is \$900, based on 9 current ordinary members.

Auditor's independence declaration

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

On behalf of the directors

Jason Chequer
Director

Melbourne, Australia
29 October 2021



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Fax: +61 3 9602 3870
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Level 18, 727 Collins Street
Melbourne VIC 3008
GPO Box 5099 Melbourne VIC 3001
Australia

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

As lead auditor of Summer Foundation Limited for the year ended 30 June 2021, I declare that, to the best of my knowledge and belief, there have been:

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

A handwritten signature in black ink, appearing to be 'EB' followed by a stylized flourish.

Elizabeth Blunt
Director

BDO Audit Pty Ltd

Melbourne, 29 October 2021

Financial Report

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General information

The financial statements cover Summer Foundation Limited as an individual entity. The financial statements are presented in Australian dollars, which is Summer Foundation Limited's functional and presentation currency.

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

Registered office

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

Principal place of business

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

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

The financial statements were authorised for issue, in accordance with a resolution of directors, on 29 October 2021. The directors have the power to amend and reissue the financial statements.

Statement of Profit or Loss and Other Comprehensive Income

For the year ended 30 June 2021

	2021	2020
	\$	\$
Revenue		
Donations	1,075,509	408,451
Philanthropic grants & projects	7,849,705	5,709,313
Government grants	1,416,556	889,585
Government grants and subsidies (COVID-19)	662,000	606,500
Housing Hub income	1,815,449	1,548,569
Interest income	3,481	3,541
Other income	52,328	41,061
Total revenue	<u>12,875,028</u>	<u>9,207,020</u>
Expenses		
Housing Hub Social Enterprise	(4,073,962)	(2,710,896)
Non-project employee benefits expense	(3,005,075)	(2,555,959)
Project costs	(3,187,303)	(2,438,843)
Depreciation and amortisation expense	(199,423)	(85,345)
Event costs	(14,843)	(41,438)
Gain/(loss) on re-measurement of assets classified as held for sale	2,000	(44,672)
Competitive research grant expenditure	(294,073)	-
Other expenses	(411,772)	(367,908)
Total expenses	<u>(11,184,451)</u>	<u>(8,245,061)</u>
Surplus before income tax expense	1,690,577	961,959
Income tax expense	<u>-</u>	<u>-</u>
Surplus after income tax expense for the year	1,690,577	961,959
Other comprehensive income for the year, net of tax	<u>-</u>	<u>-</u>
Total comprehensive income for the year	<u><u>1,690,577</u></u>	<u><u>961,959</u></u>

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 2021

	Note	2021	2020
		\$	\$
Assets			
Current assets			
Cash and cash equivalents	3	4,734,722	3,393,787
Trade and other receivables	4	1,406,046	1,306,656
Prepayments		74,767	62,248
		6,215,535	4,762,691
Assets classified as held for sale	5	-	113,454
Total current assets		6,215,535	4,876,145
Non-current assets			
Property, plant and equipment	6	124,547	116,811
Right-of-use assets	7	18,475	33,976
Intangibles	8	311,221	372,719
Total non-current assets		454,243	523,506
Total assets		6,669,778	5,399,651
Liabilities			
Current liabilities			
Trade and other payables	9	529,174	265,725
Lease liabilities	10	20,490	17,583
Employee benefits	11	648,926	383,651
Deferred revenue	12	230,983	1,184,302
Other current liabilities	13	5,900	5,900
Total current liabilities		1,435,473	1,857,161
Non-current liabilities			
Lease liabilities	10	-	19,147
Employee benefits	11	80,050	59,665
Total non-current liabilities		80,050	78,812
Total liabilities		1,515,523	1,935,973
Net assets		5,154,255	3,463,678
Equity			
Competitive research grant reserve		264,638	558,711
Accumulated funds		4,889,617	2,904,967
Total equity		5,154,255	3,463,678

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

Statement of Changes in Equity

For the year ended 30 June 2021

	Competitive Research Grant Reserve	Accumulated funds	Total equity
	\$	\$	\$
Balance at 1 July 2019	558,711	1,943,008	2,501,719
Surplus after income tax expense for the year	-	961,959	961,959
Other comprehensive income for the year, net of tax	-	-	-
Total comprehensive income for the year	-	961,959	961,959
Balance at 30 June 2020	558,711	2,904,967	3,463,678

	Competitive Research Grant Reserve	Accumulated funds	Total equity
	\$	\$	\$
Balance at 1 July 2020	558,711	2,904,967	3,463,678
Surplus after income tax expense for the year	-	1,690,577	1,690,577
Other comprehensive income for the year, net of tax	-	-	-
Total comprehensive income for the year	-	1,690,577	1,690,577
Transfer to/from reserves	(294,073)	294,073	-
Balance at 30 June 2021	264,638	4,889,617	5,154,255

Statement of Cash Flows

For the year ended 30 June 2021

	Note	2021	2020
		\$	\$
Cash flows from operating activities			
Housing Hub income		1,543,921	756,156
Donations		1,075,509	408,451
Philanthropic grants		7,868,000	5,818,112
Government grants		430,741	1,451,388
Other receipts		900,666	461,703
Interest received		3,481	3,541
Payments to suppliers and employees		(10,448,593)	(8,330,602)
Net cash from operating activities		1,373,725	568,749
Cash flows from investing activities			
Payments for property, plant and equipment	6	(67,286)	(57,710)
Payments for intangibles	8	(59,421)	(371,500)
Proceeds from assets classified as held for sale	5	115,454	-
Net cash used in investing activities		(11,253)	(429,210)
Cash flows from financing activities			
Repayment of lease liabilities		(21,537)	(8,622)
Net cash used in financing activities		(21,537)	(8,622)
Net increase in cash and cash equivalents		1,340,935	130,917
Cash and cash equivalents at the beginning of the financial year		3,393,787	3,262,870
Cash and cash equivalents at the end of the financial year	3	4,734,722	3,393,787

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

Notes to the Financial Statements

1. Significant accounting policies

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

New or amended Accounting Standards and Interpretations adopted

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

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

Basis of preparation

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

Historical cost convention

The financial statements have been prepared under the historical cost convention, except for, where applicable, the revaluation of financial assets and liabilities at fair value through profit or loss, financial assets at fair value through other comprehensive income, investment properties, certain classes of property, plant and equipment and derivative financial instruments.

Critical accounting estimates

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

Revenue recognition

The company recognises revenue as follows:

Revenue from contracts with customers

Revenue is recognised at an amount that reflects the consideration to which the company is expected to be entitled in exchange for transferring goods or services to a customer. For each contract with a customer, the company: identifies the contract with a customer; identifies the performance obligations in the contract; determines the transaction price which takes into account estimates of variable consideration and the time value of money; allocates the transaction price to the separate performance obligations on the basis of the relative stand-alone selling price of each distinct good or service to be delivered; and recognises revenue when or as each performance obligation is satisfied in a manner that depicts the transfer to the customer of the goods or services promised.

Variable consideration within the transaction price, if any, reflects concessions provided to the customer such as discounts, rebates and refunds, any potential bonuses receivable from the customer and any other contingent events. Such estimates are determined using either the 'expected value' or 'most likely amount' method. The measurement of variable consideration is subject to a constraining principle whereby revenue will only be recognised to the extent that it is highly probable that a significant reversal in the amount of cumulative revenue recognised will not occur. The measurement constraint continues until the uncertainty associated with the variable consideration is subsequently resolved. Amounts received that are subject to the constraining principle are recognised as a refund liability.

Rendering of services

Revenue from a contract to provide services is recognised over time as the services are rendered based on either a fixed price or an hourly rate.

Grants

Grant revenue is recognised in the profit or loss when the company satisfies the performance obligations stated within the funding agreements.

If conditions are attached to the grant which must be satisfied before the company is eligible to retain the contribution, the grant will be recognised in the statement of financial position as a liability until those conditions are satisfied.

Interest

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

Donation income

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

Income tax

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

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

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

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

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

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

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.

Coronavirus (COVID-19) pandemic

Judgement has been exercised in considering the impacts that the Coronavirus (COVID-19) pandemic has had, or may have, on the company based on known information. This consideration extends to the nature of the services offered, customers and staffing in which the company operates. Other than as addressed in specific notes, there does not currently appear to be either any significant impact upon the financial statements or any significant uncertainties with respect to events or conditions which may impact the company unfavourably as at the reporting date or subsequently as a result of the Coronavirus (COVID-19) pandemic.

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 11, 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.

	2021 \$	2020 \$
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3. Cash and cash equivalents

Current assets

Cash at bank and on hand	4,503,997	2,852,953
Committed future research funds	230,725	540,834
	<u>4,734,722</u>	<u>3,393,787</u>

Accounting policy for cash and cash equivalents

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

Committed future research funds represent amounts we have earmarked to fund our competitive research grant program.

4. Trade and other receivables

Current assets

Trade receivables	291,498	391,723
Less: Allowance for expected credit losses	-	(14,400)
	<u>291,498</u>	<u>377,323</u>
Accrued revenue	1,114,548	929,333
	<u>1,406,046</u>	<u>1,306,656</u>

Accounting policy for trade and other receivables

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

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

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

	2021 \$	2020 \$
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5. Assets classified as held for sale

Current assets

Rapid interim housing prototype	-	113,454
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The Rapid Interim Housing Prototype unit was sold for \$115,454 during 2021.

6. Property, plant and equipment

Non-current assets

Leasehold improvements - at cost	4,841	4,841
Less: Accumulated depreciation	(4,841)	(4,841)
	-	-
Furniture & fixtures - at cost	63,631	63,631
Less: Accumulated depreciation	(32,310)	(27,766)
	31,321	35,865
Computer equipment - at cost	367,642	300,356
Less: Accumulated depreciation	(274,416)	(219,410)
	93,226	80,946
	124,547	116,811

Reconciliations

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

	Computer Equipment \$	Furniture & Fittings \$	Total \$
Balance at 1 July 2020	80,946	35,865	116,811
Additions	67,286	-	67,286
Depreciation expense	(55,006)	(4,544)	(59,550)
Balance at 30 June 2021	93,226	31,321	124,547

Accounting policy for property, plant and equipment

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

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

Class of fixed asset	Depreciation rate
Computer equipment	33.33%
Furniture and fixtures	5% - 25

The residual values, useful lives and depreciation methods are reviewed, and adjusted if appropriate, at each reporting date. An item of property, plant and equipment is derecognised upon disposal or when there is no future economic benefit to the company. Gains and losses between the carrying amount and the disposal proceeds are taken to profit or loss.

	2021 \$	2020 \$
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7. Right-of-use assets

Non-current assets

Office equipment - right-of-use	50,386	44,317
Less: Accumulated depreciation	(31,911)	(10,341)
	<u>18,475</u>	<u>33,976</u>

Reconciliations

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

	Office equipment \$
Balance at 1 July 2020	33,976
Variable lease payment - Adjustment to right of use asset cost	6,069
Variable lease payment - Adjustment to right of use accumulated depreciation	(1,416)
Depreciation expense	<u>(20,154)</u>
Balance at 30 June 2021	<u>18,475</u>

Accounting policy for right-of-use assets

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

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

	2021 \$	2020 \$
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8. Intangibles

Non-current assets

Website - at cost	430,921	371,500
Less: Accumulated amortisation	(119,700)	-
	311,221	371,500
Software - at cost	33,603	33,603
Less: Accumulated amortisation	(33,603)	(32,384)
	-	1,219
	311,221	372,719

Reconciliations

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

	Software \$	Website \$	Total \$
Balance at 1 July 2020	1,219	371,500	372,719
Additions	-	59,421	59,421
Amortisation expense	(1,219)	(119,700)	(120,919)
Balance at 30 June 2021	-	311,221	311,221

Accounting policy for intangible assets

Intangible assets acquired as part of a business combination, other than goodwill, are initially measured at their fair value at the date of the acquisition. Intangible assets acquired separately are initially recognised at cost. Indefinite life intangible assets are not amortised and are subsequently measured at cost less any impairment. Finite life intangible assets are subsequently measured at cost less amortisation and any impairment. The gains or losses recognised in profit or loss arising from the derecognition of intangible assets are measured as the difference between net disposal proceeds and the carrying amount of the intangible asset. The method and useful lives of finite life intangible assets are reviewed annually. Changes in the expected pattern of consumption or useful life are accounted for prospectively by changing the amortisation method or period.

Website

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

Software

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

	2021 \$	2020 \$
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9. Trade and other payables

Current liabilities

Trade payables	98,658	41,301
Other payables	430,516	224,424
	<u>529,174</u>	<u>265,725</u>

The company had no interest bearing liabilities at 30 June 2021 (2020: nil).

Accounting policy for trade and other payables

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

	2021 \$	2020 \$
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10. Lease liabilities

Current liabilities

Lease liability	20,490	17,583
Non-current liabilities		
Lease liability	-	19,147
	<u>20,490</u>	<u>36,730</u>

	2021 \$	2020 \$
Opening balance on adoption of AASB 16	-	44,317
Balance at beginning of the year	36,730	-
Variable lease payment adjustment	3,930	-
Interest expense	1,367	1,035
Lease repayments	(21,537)	(8,622)
	<u>20,490</u>	<u>36,730</u>

Accounting policy for lease liabilities

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

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

	2021	2020
	\$	\$

11. Employee benefits

Current liabilities

Annual leave	543,345	304,568
Long service leave	105,581	79,083
	<u>648,926</u>	<u>383,651</u>

Non-current liabilities

Long service leave	80,050	59,665
	<u>728,976</u>	<u>443,316</u>

Accounting policy for employee benefits

Short-term employee benefits

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

Other long-term employee benefits

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

	2021	2020
	\$	\$

12. Deferred revenue

Current liabilities

Deferred revenue	230,983	1,184,302
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Accounting policy for deferred revenue

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

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	2021	2020
	\$	\$

13. Other current liabilities

Current liabilities

Allen Martin Research Scholarship	5,900	5,900
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14. Fair value measurement

Accounting policy for fair value measurement

When an asset or liability, financial or non-financial, is measured at fair value for recognition or disclosure purposes, the fair value is based on the price that would be received to sell an asset or paid to transfer a liability in an orderly transaction between market participants at the measurement date; and assumes that the transaction will take place either: in the principal market; or in the absence of a principal market, in the most advantageous market.

Fair value is measured using the assumptions that market participants would use when pricing the asset or liability, assuming they act in their economic best interests. For non-financial assets, the fair value measurement is based on its highest and best use. Valuation techniques that are appropriate in the circumstances and for which sufficient data are available to measure fair value, are used, maximising the use of relevant observable inputs and minimising the use of unobservable inputs.

15. Key management personnel disclosures

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

Compensation

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

	2021	2020
	\$	\$
Aggregate compensation	688,779	671,871

16. Related party transactions

Key management personnel

Disclosures relating to key management personnel are set out in note 15.

Transactions with related parties

Entities related to Director Di Winkler have provided donations of \$8,643,000 (2020: \$5,640,000). In addition, the company has an office lease agreement with an entity related to Director Di Winkler for \$1 per annum for a seven-year lease term.

Loans to/from related parties

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

17. Contingencies

The company has no contingent assets or liabilities as at 30 June 2021 and 30 June 2020.

	2021	2020
	\$	\$

18. Commitments

Lease commitments - operating

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

Within one year	1	1
One to five years	1	1
	<u>2</u>	<u>2</u>

The operating lease commitment is in relation to the property lease for the Box Hill premises (expiring on 5 October 2022).

19. Competitive research grant

The company has commitments for research projects to Outcome Health, totaling \$170,000 that commenced in March 2021 and spans 2 years, and Macquarie University totaling \$50,649 that commenced in April 2021 and spans 5 years. At the year ended 30 June 2021, \$56,883 of these project amounts has been paid. The remaining amounts will be paid once work commences, which is in line with the contracts that have been entered into with Outcome Health and Macquarie University.

20. Events after the reporting period

No matter or circumstance has arisen since 30 June 2021 that has significantly affected, or may significantly affect the company's operations, the results of those operations, or the company's state of affairs in future financial years.

Directors' declaration

In the directors' opinion:

- the attached financial statements and notes comply with the Australian Accounting Standards - Reduced Disclosure Requirements, the Australian Charities and Not-for-profits Commission Act 2012 and associated regulations and other mandatory professional reporting requirements;
- the attached financial statements and notes give a true and fair view of the company's financial position as at 30 June 2021 and of its performance for the financial year ended on that date; and
- there are reasonable grounds to believe that the company will be able to pay its debts as and when they become due and payable.

Signed in accordance with a resolution of directors.

On behalf of the directors



Jason Chequer
Director

29 October 2021

Melbourne, Australia

INDEPENDENT AUDITOR'S REPORT

To the members of Summer Foundation Limited

Report on the Audit of the Financial Report

Opinion

We have audited the financial report of Summer Foundation Limited (the registered entity), which comprises the statement of financial position as at 30 June 2021, 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 2021 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 (including Independence Standards)* (the Code) that are relevant to our audit of the financial report in Australia. We have also fulfilled our other ethical responsibilities in accordance with the Code.

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

Other information

Those charged with governance are responsible for the other information. The other information obtained at the date of this auditor's report is information included 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.

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

Responsibilities of responsible entities for the Financial Report

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

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

Those charged with governance are responsible for overseeing the registered entity's financial reporting process.

Auditor's responsibilities for the audit of the Financial Report

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

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

http://www.auasb.gov.au/auditors_responsibilities/ar4.pdf

This description forms part of our auditor's report.

BDO Audit Pty Ltd



Elizabeth Blunt
Director

Melbourne, 29 October 2021

With thanks

Thanks to our many supporters and collaborators

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Sharon Camac
Shelter WA
Shoalhaven City Council
Social Ventures Australia
St Vincent's Health
Summer Housing
Synapse
Vera Living
Victorian Department of Families, Fairness and Housing
Wellbeing SA
Youngcare
Yumba-Meta Housing Association



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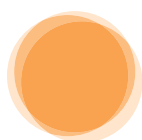
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