

Community and Social Value Report 2024

Australian Unity is one of Australia's original social enterprises which has evolved over time to become a leading provider of health, wealth and care products and services. Having a positive impact on the wellbeing of our members, customers and communities remains at the core of everything we do.

Australian Unity partnered with Social Ventures Australia (SVA) Consulting, a leading specialist consulting practice that assists organisations across Australia to achieve greater social impact, to develop metrics which demonstrate Australian Unity's contribution and commitment to enabling Real Wellbeing. Importantly, SVA Consulting bring their expert understanding of social impact best practice to objectively test and assess our approaches.

In total, Australian Unity reported a contribution of \$2.012 billion in Community and Social Value for FY2024. Review our Impact landing page and the 2024 Our Impact report [here](#).

The social impact of Australian Unity's Specialist Disability Accommodation Fund (Fund) is also valued through Australian Unity's Community and Social Value (CSV) Framework. By applying the CSV Framework, SVA Consulting calculated that the Fund created \$19.3 million in Community and Social Value in FY2024. This figure was based on, among other things, the following metrics:

- The Fund acquired 37 Specialist Disability Accommodation (SDA) places during FY2024;
- As at 30 June 2024, a total of 123 SDA Participants² reside in SDA stock³ owned by the Fund; and
- The Fund invested a total of \$24,923,116 in settled and operating SDA projects¹ in FY2024.

Based on the CSV Framework, these actions contributed to the following outcomes and Community and Social Value in FY2024:

Outcome	Description	Measure	Community and Social Value
Reduced healthcare demand	SDA tenants move into a built-environment that was designed to maximise independence, increase privacy and reduce reliance on paid support.	123 SDA Participants decreased reliance on paid supports	\$1,028,746
Improved health outcomes	SDA tenants experience improvement in wellbeing, such as how they feel about themselves and how they feel around other people	85 SDA Participants experienced improvements in their wellbeing	\$88,017
Leading social innovation	AU Property develops SDA accommodation, contributing to closing the social infrastructure gap.	\$24,923,116 invested in settled and operating SDA projects	\$17,446,181
Improved relationships	People with disabilities who live in individualised housing can experience improved relationships with friends, family, as well as have more opportunities to maintain other personal relationships	82 Participants experienced improved relationships	\$157,197
Improved community belonging	People with disabilities who live in individualised housing have been shown to experience a range of positive outcomes including greater community participation and connection as this type of housing fosters independence	82 Participants experienced a greater level of community integration	\$114,183
Maintain a sense of independence (choice and control)	People with disabilities who live in individualised housing are supported to lead more autonomous and independent lives, which includes lifestyle choices, choice of carers and greater sense of control over ones life in general	123 SDA Participants had a greater sense of independence / control	\$437,824
Reduced reliance on government subsidised aged-care	SDA services provide an alternative to government subsidised aged-care facilities.	Two new SDA Participant in FY23 would have alternatively been in aged care	\$58,984

Australian Unity Specialist Disability Accommodation Fund

The measurement framework and values attributed to the Fund by SVA Consulting are retrospective and intended to estimate the CSV created in FY2024. The measurement framework and estimated CSV attributed to the Fund by SVA Consulting are subject to change with future assessments. .

¹ Excluding contracted property, land and property under development

² A Participant is a tenant approved by the NDIS to reside in SDA

³ Fixed head leases are considered fully let

How to invest

Available for wholesale investors only, to invest click on the link or scan the QR code: australianunity.com.au/wealth/SDAF



or get in touch

1300 997 774 / 03 9616 8687

Mon – Fri, 8:30am – 5:30pm AEST

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Or contact your Regional Account Manager or the fund manager for more information:

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Important Information

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