

## Community and Social Value Report

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 \$1.76 billion in Community and Social Value for FY2023. Review our Impact landing page and the 2023 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 \$30.8 million in Community and Social Value in FY2023. This figure was based on, among other things, the following metrics:

- The Fund acquired 41 Specialist Disability Accommodation (SDA) dwellings and land lots for SDA development during FY2023;
- As at 30 June 2023, a total of 76 SDA Participants<sup>2</sup> reside in SDA stock<sup>3</sup> owned by the Fund; and
- The Fund invested a total of \$42,402,601<sup>1</sup> in settled and operating SDA projects<sup>1</sup> in FY2023.

Based on the CSV Framework, these actions contributed to the following outcomes and Community and Social Value in FY2023:

Outcome	Description	Measure	Community and Social Value
Reduced healthcare demand	SDA Participants move into a built environment that is designed to maximise independence. As a result, Participants can reduce their reliance on paid support.	76 SDA Participants decreased reliance on paid supports	\$603,609
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 one’s life.	76 SDA Participants had a greater sense of independence / control	\$263,234
Living and ageing well	SDA Participants experience improvement in wellbeing, such as in how they feel about themselves and how they feel around other people	53 SDA Participants experienced improvements in their wellbeing	\$51,305
Improved relationships	People with disabilities who live in individualised housing can experience improved relationships with friends and family, and have more opportunities to maintain other personal relationships	51 Participants experienced improved relationships	\$73,001
Improved community belonging	People with disabilities who live in individualised housing have been shown to experience greater community participation and connection as this type of housing fosters independence.	51 Participants experienced a greater level of community integration	\$68,650
Reduced reliance on government subsidised aged-care	SDA services provide an alternative to government subsidised aged-care facilities, resulting in a saving to Government.	One new SDA Participant in FY23 would have alternatively been in aged care	\$29,616
Cost of operational SDA established by the Australian Unity SDA Fund in FY23	Investment in the Australian Unity SDA Fund contributes to closing the social infrastructure gap.	\$42,402,601 invested in settled and operating SDA projects	\$29,681,821

# 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 FY2023. The measurement framework and estimated CSV attributed to the Fund by SVA Consulting are subject to change with future assessments.

<sup>1</sup> Excluding contracted property, land and property under development

<sup>2</sup> A Participant is a tenant approved by the NDIS to reside in SDA

<sup>3</sup> 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](https://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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