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2005-06 Community Housing Mapping Project

Report on Findings

May 2007

Community Housing Federation of Australia

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The Mapping Project was conducted during 2005-2006 by the Community Housing Federation of Australia (CHFA), the national peak body for community housing in Australia. CHFA represents the views of community housing providers throughout Australia.

The Mapping Project was funded by the Australian Government Department of Families, Community Services and Indigenous Affairs.

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Executive Summary

2005-06 Community Housing Mapping Project

Conducted by the Community Housing Federation of Australia

Project Background

The Mapping Project was conducted during 2005-2006[1] by CHFA, the peak body for community housing in Australia. CHFA represents the views of community housing providers throughout Australia.

Prior to the commencement of the Mapping Project, there was a lack of up-to-date information on the size, capacity and make up of the community housing sector in Australia. The Mapping Project was conducted in the context of Australia's rapidly changing housing environment, declining housing affordability and the potential role for the community housing sector to respond to this through affordable housing initiatives and partnerships. It is hoped that the Mapping Project will assist the Australian Government and State and Territory governments to better direct public policy in guiding, funding and regulating both the community housing sector as well as other key associated areas, such as land use planning, into the future. The project will assist CHFA and other not-for-profit agencies to more effectively represent the community housing sector and, by extension, current and potential tenants.

The Department of Families, Community Services and Indigenous Affairs (FaCSIA) provided financial assistance for the project and was involved in setting the project's scope, methodology and outputs.

Project Rationale

Detailed data on the community housing sector was last collected in 1998 by the National Community Housing Forum (NCHF) and the Australian Institute of Health and Welfare (AIHW). By 2005, there was a lack of up-to-date information on the total size and make-up of the sector, particularly for organisations that do not receive funding through the Commonwealth State Housing Agreement (CSHA). The Mapping Project aimed to redress this lack of data by providing a current snapshot of the sector. Such information is important for governments, policy makers and people within the community housing sector alike.

[1] A timeline for the project can be found in Appendix 4.

Project Aim and Strategy

The aim of the Mapping Project was to collect relevant, up-to-date information on the total size and make-up of the community housing sector in Australia, including organisations that do not receive funding through the CSHA, by providing a current snapshot of the sector. This was done by conducting a nation-wide survey of all known community housing providers. The consolidation of the project's scope, methodology and outputs, and the development and dissemination of the survey form were overseen by a Reference Committee comprised of representatives from the community housing sector and governments throughout the country. The AIHW provided technical support throughout the project.

Summary of findings

All findings are based on the number of responses for each question. A total of 1,735 survey forms were mailed out, and 728 completed forms were returned. Of those surveys returned, 613 were in the target group and used for the analysis, a response rate of 35%. The response rates ranged between 72% in Tasmania and 25% in NSW. All findings are based on aggregated national data. As such, data may not be comparable across jurisdictions because of the considerable variations in both the response rates and the way community housing operates in each jurisdiction.

Who manages community housing?
- 31% of respondents are welfare or not-for-profit organisations.
- 25% are specific community housing organisations.
- 21% are community housing cooperatives.
- 14% are local government organisations.
- 7% are church-based organisations.

Dwelling and tenant distribution
- On average, community housing organisations manage the most dwellings; four times as many dwellings as welfare/not-for-profit organisations.
- Community housing organisations also manage, on average, the highest number of tenancies.

Size of organisations
- The community housing sector is comprised of a large number of small organisations each managing a small number of dwellings and tenancies.

Size of the sector
- Survey respondents reported managing 22,468 dwellings.
- 81% of these are separate houses and flats (10,065 and 8,179 respectively). A further 2,107 of these are semi-detached dwellings.

Distribution
- The majority of dwellings managed by survey respondents are in major cities and inner regional areas (60% and 22% respectively).
- Community housing in remote and very remote areas is scarce.

Boards of management

- The majority of all organisations are governed by a board of management, with the exception of local government organisations.
- A high proportion of church-based and welfare/not-for-profit organisations require certain skills of their boards.

Funding

- 63% of organisations report they receive no funding from their State Housing Authorities (SHA). It is possible, however, that many organisations who receive funding through an umbrella agency, or who received a capital grant many years ago, are not aware these funds came from their SHA.
- The most common source of income is recurrent rental income, which is a funding source for 83% of organisations.

Targeting

- 78% of organisations target specific groups within the low-moderate income range. The majority (74%) of these organisations target only one or two groups.
- People over 65 years and people with disabilities are targeted by the highest number of organisations (37% and 36% respectively). A large number of organisations noted that they target people over 50, 55 or 60 years of age. As such, the proportion of people within a broader category of "aged" would comprise the majority of groups targeted by organisations.
- Community housing organisations are the predominant organisation type to target "high needs" groups, such as people with a mental illness or people with alcohol and other drug dependencies.

Non-housing assistance

- 60% of organisations offer some form of non-housing assistance to their tenants. This ranges from 40% in South Australia to 69% in Tasmania.
- The majority of this non-housing assistance is information, referral and/or advice, and personal support.
- Overall, church-based and welfare/not-for-profit organisations offer the greatest range and proportion of non-housing support, while local governments offer the least.

Tenancy and rent structure

- 90% of organisations offer both tenancy and property management services.
- Survey respondents manage 27,922 tenancies.
- 55% of tenancies had their rent calculated based on a tenant's income.
- 26% of tenancies had their rent calculated based on a tenant's estimated Commonwealth Rent Assistance (CRA).
- A greater proportion of organisations using CRA focused rent structures manage 50 dwellings or more. This may be indicative of a greater administrative capacity amongst these larger organisations for developing or adopting tools to calculate and charge this type of rent.

Title

- 53% of organisations hold title to some or all of their dwellings.
- Local government organisations are the most likely type of organisation to hold title to their dwellings (88%) and cooperatives the least (32%).

Past growth

- 52% of organisations have experienced growth since 1 July 1999.
- This growth is most concentrated in South Australia, where 75% of organisations have grown since 30 June 1999.
- Within organisation types, this growth has been most prominent amongst community housing organisations, 69% of which have grown, and spread more evenly across the other organisational types.
- The majority of growth has occurred through new developments and stock transfers from State Housing Authorities where title has not been transferred (44% and 31% respectively).
- The majority of this growth has been financed through capital grants and partnerships/joint ventures with the private sector or government (44% and 33% respectively).

Future growth

- Nationally, 67% of organisations have plans to grow, or would like to grow in the future.
- 80% of community housing organisations would like to grow.
- Future growth aspirations are proportional to the size of an organisation, with larger organisations being more likely to want to grow than smaller ones.
- 53% of organisations believe that future growth will be financed through a capital grant, while 49% believe that financing will be achieved through a joint venture with the private sector or government.
- 60% of organisations believe there are barriers to growth. The most common of these is a lack of funding, followed by a lack of title to their properties, lack of resources and difficulties with government. A lack of land and/or builders is a theme in Queensland and Western Australia.

Partnerships

- 39% of organisations have been involved in a partnership arrangement since 1 July 1999.
- 36% of organisations indicate they are considering a partnership arrangement in the future.
- Joint venture and public/private/community partnerships are the most likely partnership type being considered for future partnerships.
- The major contrasts between past partnership arrangements and future partnership aspirations is the increase in the popularity of joint ventures, public/private/community partnerships (PPCPs) and small scale private sector developments and the decrease in the percentage of organisations considering headleasing arrangements.
- There has been a decline in the number of church based and welfare/not-for-profit organisations considering future partnerships, compared to past partnership involvement.
- Organisations holding title to some or all of their dwellings are more likely to engage in future partnerships than organisations that do not hold title (54% and 47% respectively).
- Organisations that hold title are much more likely to become involved in a joint venture partnership in the future than organisations that do not hold title (69% and 36% respectively).

Conclusion

The Mapping Project paints a picture of a diverse and complex community housing sector. Organisations are spread throughout Australia, including regional and outer regional areas. Although there have been amalgamations and consolidations by many of the smaller community housing providers in recent years, and the promotion of larger 'growth' organisations in states such as Victoria and Western Australia, the community housing sector is still dominated by a large number of small organisations. These smaller housing providers, which are scattered throughout the country, target a diverse range of tenant groups and have a wide variety of operating structures. This embodies many of the strengths of the community housing sector. It is the larger organisations, however, that are most likely to grow in the future through a partnership.

A number of organisations do not believe they receive funding from their SHA (and through it, the Australian Government and State and Territory governments). This situation could potentially be addressed through a more specifically targeted and acknowledged funding framework in the future. While the most common income/funding source for organisations is recurrent rental income, this is often augmented with another funding source or sources.

The majority of organisations target their accommodation to specific groups within the low-moderate income earning range. Community housing organisations are more likely to target high needs tenants than are other organisation types, such as welfare/not-for-profit groups and church-based organisations. This may be reflective of the social justice principles often associated with community housing organisations.

Most organisations provide non-shelter assistance to their tenants. As well as the tenant benefits usually associated with community housing, such as dealing with smaller, less bureaucratised organisations that are based in the community that they serve, the Mapping Project shows that many organisations are able to offer more than just housing. This bundling of support services likely provides a more holistic approach to a tenant's welfare than may be on offer through government agencies administering public housing, and can ultimately lead to better tenant outcomes.

Income-based rent setting structures are still by far the most common amongst the survey respondents, as they were when the 1999 Mapping Project was conducted. It is possible that this will change, however, as more organisations are encouraged by their State/Territory governments to take into consideration a tenant's estimated Commonwealth Rent Assistance when calculating their rent.

Some key factors may be influencing organisations to begin using a rent-setting structure that takes into account a tenant's estimated Commonwealth Rent Assistance. These include policies by State and Territory governments that encourage or require organisations to optimise CRA, and the opportunity for organisations to capitalise on a different source of government funding. Using a CRA focussed rent setting structure also gives organisations a greater degree of predictability for their income stream. Another catalyst for change in rent setting structures may come when the current CSHA expires in 2008 and a new funding framework is negotiated between the Australian Government and State and Territory governments.

Where comparable, the findings of the Mapping Project are broadly consistent with the CSHA national data reporting for 2004-05. Although the Mapping Project does not provide comprehensive data on areas such as household composition, as does the CSHA reporting, it offers a range of other unique data on the community housing sector. Two such areas are future growth aspirations, including barriers to growth, and detailed information on partnerships.

The majority of organisations would like to grow in the future. There is a strong relationship between the size of an organisation and its desire to grow: the larger an organisation, the more likely it is to want to grow. Despite organisations' growth aspirations, a high proportion of respondents believe there are barriers to this growth. The most common of these is a lack of funding. Whilst this, and other barriers, are broadly similar across the country, a shortage of land and/or builders is a theme in Queensland and Western Australia.

About one third of all organisations are considering a partnership in the future. It is interesting to note that the type of partnership organisations think they will become involved in varies according to whether or not they hold title to any or all of their dwellings. Organisations holding title and wishing to grow are more likely to be considering a joint venture than other partnership types. This may indicate that the leverage available when an organisation holds title to its properties influences its business decisions.

Given the opportunity, the community housing sector is well placed to make a significant contribution to alleviating housing stress and increasing housing affordability throughout Australia.

Acknowledgements

The Mapping Project team would like to extend its gratitude to all those who have participated in the Mapping Project by taking the time to fill out the survey.

The project has been made possible by the time and guidance afforded by its Reference Committee, in particular, Melinda Petrie and Kristy Raithel from the Australian Institute of Health and Welfare.

We would also like to thank Ella Doney, who volunteered her time to assist with data entry; Geoff Slack, for his advice and for coordinating the survey pilot; and Jean Bourke and Barbara Chevalier for their support and editorial assistance.

The Mapping Project has been made possible with the financial support of the Department of Families, Community Services and Indigenous Affairs.

A special thank you must be extended to Kate Everett, whose help in the final stages of the project ensured its success.

Eddy Bourke, CHFA Policy Officer
Carol Croce, CHFA Executive Director

Glossary

Note:	Throughout the report, the terms 'organisation' and 'respondent' are used interchangeably. Detailed definitions of terms used in this report can be found in **Appendix 1, Definitions**.
AIHW	Australian Institute of Health and Welfare
CERC	Common Equity Rental Cooperatives
CHFA	Community Housing Federation of Australia
CHFV	Community Housing Federation of Victoria
CRA	Commonwealth Rent Assistance
CSHA	Commonwealth State Housing Agreement. The CSHA is the main form of funding for community housing from the Australian Government. It is paid to State Housing Authorities, who match Commonwealth dollars and are responsible for administering these funds.
Community Housing	A type of social housing that offers a secure and affordable housing option for people on low to moderate incomes, and is administered by the not-for-profit sector. 'Community housing' refers to a range of types of organisations, which together comprise the 'community housing sector'.
Community Housing Organisation	A particular <u>type</u> of community housing provider. A not-for-profit organisation that is often linked to other community support services. In organisations day-to-day management of the organisation is often delegated to staff.
FaCSIA	Department of Families, Community Services and Indigenous Affairs
MP	2005-06 Community Housing Mapping Project
NCHF	National Community Housing Forum
Organisation	The incorporated entity managing community housing dwellings
Peak	Community housing peak body
QCHC	Queensland Community Housing Coalition
RC	Reference Committee
SHA	State Housing Authority
Target Group	The population group intended to be housed or eligible to be housed by an organisation.

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1 Introduction

The Community Housing Federation of Australia (CHFA) 2005-06 Mapping Project has been conducted with the aim of providing a snapshot of the size and capacity of the community housing sector in Australia, particularly for providers that do not receive funding through the Commonwealth State Housing Agreement (CSHA).

The Background section offers an overview of the Mapping Project. Its rationale, aims, objectives and strategies for implementing the project are presented. The project is then contextualised by examining relevant issues in detail. This section refers to the previous project, which the current Mapping Project follows.[2]

Section Three, Methodology, comprises all aspects of the planning and implementation of the project. It is split into four sub-sections: development, implementation, analysis and data issues. In this section, the Mapping Project's rationale, aims, objectives and strategies are expanded and justified by detailing the actions that arose from them, and the sequence in which these were conducted. A discussion of issues surrounding the sample quality and reliability of the survey data is also included.

Section Four presents and discusses the findings of the Mapping Project. Charts are used to illustrate the key points and themes that have emerged from the data. Where appropriate the findings have been cross-referenced with the 2004-05 CSHA national data reporting for community housing.

Section Five, Conclusion, draws together and briefly discusses the major themes that have emerged from the Mapping Project's findings.

The data from the respondents are tabulated in Appendix 2, Tables of Data.

[2] This was conducted by the National Community Housing Forum and the Australian Institute of Health and Welfare (AIHW) in 1998-99. Two reports were published: *Community Housing Mapping Project Report on Findings* and *Community Housing Mapping Project Data Report*, both published by AIHW in June 1999.

2 Background

The Mapping Project was conducted during 2005-2006[3] by CHFA, the peak body for community housing in Australia. CHFA represents community housing peak bodies from each State and Territory, as well as other national ecumenical and welfare organisations that provide housing.

Community housing is a type of social housing that offers a secure and affordable housing option for people on low to moderate incomes, and is administered by the not-for-profit sector. Detailed definitions of terms used in this report can be found in Appendix 1.

The Mapping Project has been funded by the Department of Families, Community Services and Indigenous Affairs (FaCSIA).

The Australian Institute of Health and Welfare (AIHW), the Australian Government agency that is responsible for data collection on social housing, provided general advice, guidance with data collection and technical assistance, where appropriate.

2.1 Project Issues and Context

This sub-section describes the context in which the Mapping Project has been carried out, and details the key issues that have informed the focus and development of the project.

2.1.1 History of Community Housing

The community housing sector is an exemplar of diversity. It is comprised of very small to very large organisations, operating under a wide variety of organisational structures. Despite these differences, principles of social justice and a value of tenant participation in the management of their housing are applied throughout the sector. The sector provides a wide range of rental accommodation, which includes boarding houses and independent living units for the aged as well as houses and flats dotted throughout Australia's cities and towns.

Community housing has been funded in Australia since the 1950s. At that time, funding was mainly directed towards the provision of accommodation for the aged and people with disabilities. During the 1970s and 1980s the sector expanded with the rise of the cooperative movement.[4] Capital seed funding was made available by Commonwealth, state and local governments during this period.

In the 1990s the community housing sector experienced major growth. This was largely kick-started when the federally-funded Local Government and Community Housing Program, which was primarily a seeding program, was transformed into the Community Housing Program (CHP).[5] Transfers of public housing stock into community management also contributed to the expansion of the sector.

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[3] A timeline for the project can be found in Appendix 4.
[4] Australian Institute of Health and Welfare (1999) p. 12.
[5] National Community Housing Forum (2001), p 5; Australian Institute of Health and Welfare (1999) p.12.

The CHP stipulated that 10% of funding be used for 'infrastructure'. CHP defined infrastructure as "management, technical, financial structures and resource organisations to support the long-term expansion of the sector". In most states and territories, various forms of 'resourcing' were funded, resulting in the establishment or further funding of community housing peak bodies to deliver resourcing to the sector as well as core policy and advocacy work. In 1996 CHP funding to the states and territories was "untied". This enabled the Commonwealth to begin playing a more active role at the national level, funding the establishment of CHFA and providing further funding to the newly established National Community Housing Forum (NCHF).[6]

2.1.2 Establishment of the Community Housing Federation of Australia

CHFA had its genesis in 1992 at the Australian Housing Cooperatives' Conference, which called for the establishment of a national cooperative housing peak body. While Australian Government bureaucrats were sympathetic to this proposal, they urged the development of a peak body that could represent the community housing sector in its entirety. In October 1995 federal funding was secured through the then Department of Housing and Regional Development. The foundation meeting of the Community Housing Federation of Australia was held in February 1996.[7] CHFA is made up of the state and territory peak organisations of community housing providers and their members as well as nationally based CHOs, welfare and ecumenical organisations who support CHFA's purpose and objectives.[8]

CHFA's principal policy focus is to "articulate the role community housing can play in meeting the needs of Australians and to describe the policy framework required to facilitate that role."[9]

2.1.3 Current context

2.1.3.1 Affordability 'crisis'

There has been a consistent downward trend in housing affordability in Australia over the last 40 years.[10] From the late 1990s until the early 2000s, Australia experienced an unprecedented housing boom. Some reasons put forward for this include sustained low interest rates, coupled with financial deregulation; the introduction of the First Home Owners Grant, which encouraged earlier entry into home ownership; low returns in the share market, prompting investors to rebalance their portfolios with higher holdings in property; and the 1999 changes to capital gains tax, which increased the relative attractiveness of investing in property.[11] During this time, Australia also experienced significant demographic changes, including an increase in the number of single person households and population increases due to immigration, which have seen the number of

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[6] National Community Housing Forum (2001) pp. 5-6.
[7] Hewlett, Ginny (no date) pp. 1-2; *Porter Grey Matter Associates* (1995) pp. 1-4.
[8] See http://www.chfa.com.au/about_CHFA/how_to_join.asp (website accessed 8 May 2006).
[9] Community Housing Federation of Australia (2001) p. 2.
[10] Planning Institute of Australia (2004), p. xl.
[11] ACTCOSS and ACT Shelter (2006), p. 12.

households outpace population growth.[12] Whilst many individuals and sectors of the Australian economy have benefited from this boom, there has been a corresponding decline in housing affordability for low income earners and otherwise disadvantaged people.

This decline in housing affordability has led to a marked increase in housing stress. Housing stress is generally defined as occurring when a household pays more than 30% of its income on rent.[13] Housing stress is most likely to affect people in the two lower income earning quintiles.[14] At least 1.5 million Australians are estimated to be in housing stress.

The primary source of funding for social housing programs in Australia is the CSHA. The Australian Government provides $1b/year, with the State/Territory governments contributing an extra $350m.[15] In real terms, CSHA funding has decreased by 30% over the last ten years.

This lack of housing affordability, combined with decreases in CSHA funding has resulted in increased targeting of high-needs groups (such as women escaping domestic violence and people with mental illnesses) by State Housing Authorities (SHAs), which administer public housing.[16] Higher demand for housing and reduced funding mean that SHAs no longer have the capacity they once did to house moderate-income earners and other tenants who do not have high needs. Most SHAs—and some Community Housing Organisations (CHOs)—are now beginning to operate at a deficit, and are funding their budgetary shortfalls through postponed maintenance and asset sales—an unsustainable solution which is further tightening waiting lists for social housing.[17]

A new group of people disadvantaged by the lack of affordability in the housing market has emerged: middle income earners who cannot afford to buy their own home or are experiencing housing stress in the private rental market.[18] The community housing sector is in an excellent position to play an increasingly important role in growing the supply of affordable housing to meet the needs of this—and other presently disadvantaged—groups.

The first commitment of the Framework for National Action on Affordable Housing, endorsed by Local governments and all State/Territory and Australian Housing Ministers in August 2005, is to create a national sector development plan for not-for-profit housing providers which will enable them to participate in large scale affordable housing initiatives.[19] Ministers at all levels of government have signed off on this agreement. The emphasis of the commitment is to support not-for-profit (community) housing sector as the primary growth vehicle for affordable housing. This represents a major policy shift. The community housing sector is becoming a central player where it was once peripheral and 'alternative'.

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[12] Yates and Wulff (2004), p. 4.
[13] Community Housing Federation of Australia (2004), p. 3; Yates and Wulff (2004), p. 1.
[14] Brotherhood of Saint Lawrence. See http://www.bsl.org.au/main.asp?PageId=14. Website accessed 12 May 2006; Planning Institute of Australia (2004), p. xl.
[15] Shelter WA (2003), p. 1.
[16] Planning Institute of Australia (2004), p. liii.
[17] Ibid, p. 38.
[18] Bevington, Steve (2006c).
[19] *Framework for National Action on Affordable Housing*. (2005), p. 5.

2.1.3.2 Rise and rise of Affordable Housing

What is affordable housing, and how does it differ from public and community housing? There is no widely accepted precise definition of affordable housing. The term means slightly different things to different people. This is evident in the literature on the subject, and also become apparent during discussions amongst the Reference Committee for the Mapping Project. There is, however, a general consensus throughout the sector and amongst other key stakeholders: affordable housing is a type of community housing, but unlike more traditional models of community housing, affordable housing initiatives may involve partnerships with the private sector, mixed funding models, flexible rent structures and a broader range of tenant groups.

Because of the priority shift by social housing providers (both public and community housing) towards those in greatest need, the vulnerability to unaffordable housing by other people with low to moderate incomes (such as essential service workers) has increased. Community housing organisations involved in affordable housing initiatives are often able to cater for people in this demographic. The range of target households for affordable housing tends to be more reflective of the wider community, and does not restrict providers to assisting only a small proportion of the general population. A broader tenant mix means a greater mix of tenant incomes, providing CHOs with a greater rental income stream and also allows for cross-subsidisation within an organisation.[20]

The charity status of most CHOs, which provides tax relief for investors, coupled with their extensive experience managing tenancies makes CHOs ideal joint venture partners for affordable housing initiatives. Partnerships are shaping up to be the major growth vehicle for increasing the supply of affordable housing in Australia. When government funding or assistance is used in partnerships with the community housing sector in affordable housing initiatives, it represents very good value for the tax payer, delivering about one and a half times more housing than other methods of housing development.[21]

In summary, the **drivers** for this new type of housing assistance include:

- the “crisis” in housing affordability, outlined above;
- the decline of CSHA funding for the social housing sector;
- CSHA funding being tied to attracting investment from outside the social housing system (see Appendix 2); and
- the willingness of the private sector to engage in long-term investments (evidenced by the involvement of representatives from the major banks and superannuation sectors at community housing sector development forums, conferences and other events).

Mechanisms to encourage affordable housing initiatives and partnerships with the community housing sector include:

- stock transfer from SHAs to CHOs, who can then leverage against these assets and purchase or develop new properties;
- better resourcing of the sector to better position CHOs who wish to become involved in partnerships and the provision of affordable housing;[22] and
- better planning and development.

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[20] Bevington, Steve (2006b); Community Housing Federation of Australia (2004), pp1-3, 5-8.
[21] Bevington, Steve, ABC Radio National, *Perspective*, 13 February 2006; Milligan, Vivienne (2005), p. 1.
[22] Milligan, Vivianne (2005), p4.

2.1.4 Changes in nature and role of community housing providers

As well as the changes that have occurred in Australia's housing market, as discussed above, several major changes are also taking place within the community housing sector. Some of these include:

- a trend towards larger, more financially sophisticated providers of community housing. In Victoria, the State government has injected $75m to support the State's five largest housing associations as they move into a new phase of growing the supply of affordable housing through partnerships.
- accreditation of the sector. In NSW and Queensland, State governments have established accreditation agencies for the sector, based on the national standards for the community housing sector developed in conjunction with the NCHF.[23]
- a major restructure of social housing regulation and funding in South Australia, with a raft of policies designed to encourage CHOs to take on management of many of the State's public housing properties, and also to grow the supply of affordable housing.[24]

2.1.5 1999 Mapping Project

In 1998-99, the NCHF conducted a national survey of the community housing sector, in conjunction with the AIHW, funded by the then Department of Families and Community Services (FaCS). The 1999 Mapping Project's final report identified seven areas which would provide a basis for future policy, program development, organisational development and resourcing decisions in relation to community housing, which FaCS was interested in. These were:

- a better understanding of the contribution made by the non-government sector to meeting varied housing needs and target groups;
- the effectiveness of existing community housing managers;
- the accessibility of community housing;
- the possible impact of control over community housing assets;
- opportunities for new partnerships and funding sources;
- responses to housing need; and
- affordability.[25]

The present Mapping Project captures data that follows up on these areas. In the current housing and policy context, the design of this project paid particular attention to gathering data on partnerships and growth in the sector.

2.1.6 Summary of Project Issues and Context

Prior to the commencement of the Mapping Project, there was a lack of up-to-date information on the size, capacity and make up of the community housing sector in Australia. The Mapping Project was conducted in the context of Australia's rapidly changing housing environment, declining housing affordability and the potential role for the community housing sector to respond to this through affordable

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[23] See National Community Housing Forum (2003) *National Community Housing Standards Manual, second edition.*
[24] See http://www.chcsa.org.au/docs/Weekly%20E-bulletin%2013-06.pdf. Website accessed 16 May 2006.
[25] Australian Institute of Health and Welfare (1999), pp. 13-14.

housing initiatives and partnerships. It is hoped that the Mapping Project will assist the Australian Government and State and Territory governments to better direct public policy in guiding, funding and regulating both the community housing sector as well as other key associated areas, such as land use planning, into the future. The project will assist CHFA and other not-for-profit agencies to represent more effectively the community housing sector and, by extension, current and potential tenants.

2.2 Overview of the Mapping Project

The following sub-section provides an overview of the rationale, aims, and objectives of the Mapping Project.

2.2.1 Rationale

Detailed data on the community housing sector were last collected in 1998[26] by the National Community Housing Forum (NCHF) and AIHW. By 2005, there was a lack of up-to-date information on the total size and make-up of the sector, particularly for organisations which do not receive funding through the CSHA.[27] The Mapping Project aimed to redress this lack of data by providing a current snapshot of the sector. Such information is important for government, policy makers and people within the community housing sector alike.

2.2.2 Project Aims

To collect relevant, up-to-date information on the total size and make-up of the community housing sector in Australia, including organisations that do not receive funding through the CSHA, by providing a current snapshot of the sector.

Sub Aim 1
To glean further information about the existing and potential capacity of community housing organisations (CHOs) to meet the new initiatives fostered by the current CSHA.[28]

Sub Aim 2
To collect information relevant to the changing nature of the community housing sector, such as: rent setting structures used by CHOs; whether or not organisations have experienced growth[29] in the number of dwellings they manage since the last mapping project; whether they would like to grow in the future; how they believe this might occur and what barriers they perceive to growth.

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[26] Whilst the research for this project was carried out in 1998, the report was not written and submitted until 1999. Hereinafter, this project will be referred to as the 1999 Mapping Project.
[27] The CSHA is the main source of Australian government funding for the community housing sector in Australia. The CSHA is negotiated between the Commonwealth and State/Territory governments every five years, with both levels of government contributing funds. The Australian Government requires that certain data be collected and reported on as part of the Agreement.
[28] One of the most significant of these initiatives is the requirement by the Australian Government that each State and Territory put in place structures that will encourage investment in social housing by the private sector. Failure to do this could result in a 5 per cent reduction of the Australian Government contribution to that State or Territory.
[29] See definition of "growth", Appendix 1.

2.3 Objectives

The objectives of the Mapping Project stemmed initially from the terms of reference within the project funding contract that was negotiated with FaCSIA. The objectives of the project were added to and consolidated by the Reference Committee (RC) (see Section 3.1 below).

The objectives of the Mapping Project were to:

1. Ascertain the extent to which CHOs are attracting outside investment into social housing through partnerships and joint ventures.
2. Investigate whether or not organisations have grown since the last Mapping Project data collection in 1998, and how many would like to grow in the future. Ascertain the catalyst/s for this growth and how organisations envisage this growth will occur (for instance, through partnerships). Ascertain the factors that organisations perceive as inhibiting their ability to grow.
3. Investigate the rent setting structures used by organisations, including ascertaining how many organisations are taking into account the Commonwealth Rent Assistance (CRA) to which their tenants are entitled when calculating rent.
4. Assess the size and geographic distribution of the sector, including the dwelling distribution, to a regional level.
5. Assess which groups are currently being targeted for housing by CHOs.[30]
6. Ascertain the profile of the sector: what types of organisations exist, and how many, and what types of management structure they employ in their governance.
7. Assess the funding source/s of CHOs.
8. Calculate the number of organisations that provide support other than housing.
9. Ascertain the number of CHOs that hold title and equity in their properties.

2.4 Project scope

The scope of the Mapping Project was determined through initial consultation with FaCSIA, and further refined and consolidated by the RC. The following sub-section details the Mapping Project's data collection coverage, types of community housing that were included within the project's target group, those that were excluded, and the data level and collection protocols.

2.4.1 Coverage

The Mapping Project covered community housing providers in Australia, with the exception of the Northern Territory. Although there are a large number of Indigenous community housing providers, these are not within the target group of the project. The anticipated small response rate of the remainder of organisations would not have provided an accurate portrayal of the NT sector, as the vast majority of community housing providers fell outside the parameters of the Mapping Project.

[30] For instance, Indigenous households, disability households and aged households.

Also excluded from the target group were former Aboriginal and Torres Strait Islander Commission housing stock, nursing homes, other types of hostels where full time medical care is provided, and crisis accommodation. All other not-for-profit housing providers were considered to be within the target group.

It was decided by the RC that transitional accommodation be included within the survey target group, due to the widely varying lengths of tenure within transitional housing and the limited number of exit points for many tenants in transitional properties. Additionally, it was felt that many organisations may have had difficulty distinguishing the categorisation between transitional properties and medium/long-term properties under their management.

With regard to the project's data coverage, the RC aimed to cast a wide net, rather than risk leaving out many organisations.

2.4.1.1 Inclusions

The Mapping Project data collection included the following:

- Housing funded (capital and/or recurrent) in full or part through the CSHA;
- Housing where tenancy management functions are undertaken by a community provider or Local Government;
- Dwellings leased for the provision of community housing (head leasing) provided the tenancy management function is undertaken by a community provider;
- Dwellings bought or owned by the State Housing/Community Housing Authority but managed by a community provider or local government;
- Joint ventures between private organisations and community housing providers;
- Special purpose housing funded by non-housing government agencies such as health and/or community services departments for specific client groups such as disability, drug and alcohol, ex-offenders and family group houses;
- Aged accommodation, for independent living, such as independent living units, boarding houses and group homes;
- Not-for-profit boarding houses;
- Indigenous housing managed by not-for-profit community housing providers, including properties previously managed by the Aboriginal and Torres Strait Islander Commission (ATSIC);
- Student accommodation that is offered off campus.

2.4.1.2 Exclusions

The Mapping Project data collection excluded the following:

- Nursing homes and aged care hostels;
- Indigenous housing managed by organisations that are not community based, for example Aboriginal Housing Authorities;
- Funded or registered community housing organisations that are not-for-profit and manage community housing for Indigenous people;
- Non-asset based interventions involving additional surety to private landlords;
- For profit boarding houses;
- On campus student accommodation and halls of residence;
- Crisis Accommodation Program;
- Services or programs where accommodation provisions are for the sole purpose of delivering therapeutic or rehabilitation programs.

2.4.2 Data level and collection protocols

Organisations have not been identified in any data reported. Data have been aggregated to State/Territory and regional/metropolitan levels. No details of individuals were solicited in the survey instrument. Data regarding specific dwellings managed by organisations have been aggregated to the organisation level. Data storage will remain confidential.

3 Methodology

The following section describes the development of the survey instrument, the implementation of the data collection, the data entry process and data analysis.

3.1 Development of methodology

This sub-section describes in detail the five main phases of developing the survey instrument.

3.1.1 Establishing contacts and the Reference Committee

The project began by establishing key contacts within each State Housing Authority (SHA), each State peak community housing body and other key stakeholders, including FaCSIA and AIHW. These contacts were all invited to join the RC for the Mapping Project. A full list of the RC members can be found in Appendix 3. Once the RC was formed, a discussion paper was distributed to stimulate debate. It suggested possible ways in which the project might proceed, and tentative definitions for key terms.

The aim of the RC throughout the project was to:

- provide guidance;
- offer a range of alternative views from its diverse membership;
- assist, where appropriate, with the implementation of the project;
- assist with refining the scope of the project;
- assist with specifying the desired outputs of the project;
- ensure that CHFA was accountable to the funding body and the sector in general.

Members communicated by email, telephone and teleconferencing.

3.1.2 Development of the survey instrument

The format of the AIHW 2005-06 CSHA data collection survey was used as a template for the survey instrument. The RC and staff from AIHW assisted with the development of the survey instrument, including determining what information was sought and the order in which this appeared on the survey instrument. Consideration was given to compatibility with existing data collections. Accordingly, definitions used in the survey were based on, or cross checked against, existing definitions used by AIHW and other agencies in their data collections. Additionally, definitions were assessed for their compatibility across and within different jurisdictions.

The survey instrument comprised two sections. Section A had a dual function. Firstly, it enabled respondents to self select whether or not they were in the target group, by asking two “yes or no” questions. If the respondents answered “no” to both of these, they were considered to be outside the range of the target group, and instructed to return the survey form in the reply paid envelope without filling out Section B. Section A also contained a question which allowed respondents to identify other CHOs of which they were aware.

Section B contained the questions for data collection. A copy of the final survey instrument can be found in Appendix 7.

3.1.3 Outputs

A full list of all outputs can be found in Appendix 5. The outputs for the survey correspond with the project's objectives (see Section 2.2 above). These were consolidated by the RC throughout the development of the survey instrument.

3.1.4 Piloting

The survey instrument was piloted in Victoria by the Community Housing Federation of Victoria (CHFV). Ten organisations participated in the pilot, representing a diverse range of providers in terms of size, structure and location. The organisations filled out the survey and commented on each question, as well as completing a qualitative questionnaire regarding the survey instrument itself (see Appendix 6). This information was collated and sent out to the RC, which then discussed how the survey form should be changed in light of the comments from the pilot group. The survey form was then amended accordingly.

3.1.5 Identification of target organisations

A list of target organisations was developed by drawing on the extensive local knowledge and data sources which each of the State/Territory community housing peaks and SHAs possess. SHAs and peaks assisted by providing names of all CHOs of which they were aware. Other key organisations, such as the Council on the Aged, were also contacted. All information was entered into a master list of CHOs and cross-checked to remove double counting.

Additionally, a question in Section A of the survey instrument (see Section 3.1.2 above) asked respondents to list any other CHOs of which they were aware. These were then cross-checked against the existing master list. This 'snowballing' effect grew the list of known CHOs. A second round of surveys was mailed out to these additional CHOs.

3.2 Implementation

This sub-section describes in detail the implementation of the survey. The primary activities in this phase were survey dissemination, dealing with mail returned to sender, sending out reminders to non-respondents, and providing assistance to respondents.

3.2.1 Survey dissemination

The survey instrument was mailed to a total of 1735 organisations in July 2006. The mail-out was coordinated with each SHA. This was especially important because the SHAs were also mailing out CSHA data collection questionnaires around the same time period. The two data collections may have at first appeared to be asking for similar information. Therefore, separate cover letters were written for each State/Territory, according to the arrangements within each jurisdiction.[31] The logo of each State/Territory peak body or bodies were also included on the cover letters. The table below details the different arrangements that were employed in each jurisdiction.

[31] The timing of the mail-outs varied across each jurisdiction. In Tasmania and Victoria, it was possible to organise a joint mail-out. In Western Australia and New South Wales a cover letter was inserted into the CSHA data collection form, which was sent out before the MP, advising recipients that they would be receiving another survey shortly, and explaining the differences between the two data collections and the importance of each.

Mapping Project mail-out arrangements in each State/Territory

State/Territory	Arrangement
ACT	MP survey instrument sent out prior to SHA CSHA questionnaire.
NSW	SHA CSHA questionnaire sent out prior to MP survey instrument. A letter was inserted into the CSHA questionnaire package explaining that the MP survey would be sent out, as well as the differences, purpose and importance of both data collections.
QLD	MP survey instrument sent out prior to CSHA data collection.
SA	Individual mail-outs of MP and CSHA data collection. SHA officers participated in development of MP cover letter.
TAS	MP survey instrument sent by SHA in a joint mail-out with CSHA survey.
VIC	MP mailed by SHA to all providers except Common Equity Rental Cooperatives (CERCs) and non-CSHA funded providers. MP mail-out by CHFA to CERCs and non-CSHA providers.
WA	SHA CSHA questionnaire sent out prior to MP survey instrument. A letter was inserted into the CSHA questionnaire package explaining that the MP survey would be sent out, as well as the differences, purpose and importance of both data collections.

3.2.2 Mail returned to sender

A total of twenty surveys were returned to sender. Of these, the current addresses of eleven organisations were ascertained and the surveys were resent.

3.2.3 Reminders

Three weeks after the Mapping Project surveys were mailed out, reminder emails were sent to all recipients with known email addresses. In Queensland, where the email addresses of CHOs were not provided, a reminder email was sent by the Queensland Community Housing Coalition (QCHC) to all of its members. Reminder notices were also posted in the CHCSA and QCHC e-bulletins, as well as *NB*, the CHFA e-bulletin. The number of emails, phone calls and survey returns received by CHFA after these reminders indicate their usefulness.

3.2.4 Assistance to respondents

The cover letter sent out with the Mapping Project survey instrument, as well as the survey instrument itself, encouraged survey respondents to contact the CHFA office if they required any assistance. CHFA staff answered questions from survey recipients and readily provided assistance with completing the survey form.

3.3 Analysis

Data was analysed during August and September 2006. There were three components to this phase: logging returns, entering data and advanced analysis.

3.3.1 Logging returns

Returned surveys were logged into a spreadsheet. The spreadsheet contained columns which showed:

- whether or not the organisation was part of the target group (organisations were also able to be recorded as not being part of the target group as a result of phone or email contact with the organisation);
- whether the details of an organisation had been removed from the master list of CHOs as a result of indicating that they were not part of the target group;
- the return date;
- return to sender tracking; and
- the total number of surveys returned in each State/Territory.

3.3.2 Data entry tool

Data from returned surveys categorised as being within the Mapping Project target group were entered into an Excel-based data entry tool, developed by AIHW. A range of identifying codes was assigned for each jurisdiction. Data for each jurisdiction were entered into separate Excel workbooks, which were later collated into a single master file. The data entry tool is divided into four "worksheets" within the workbook. The first allowed for identifying information about organisations to be logged, along with an ID code. Survey response data were then entered into the second sheet, which contained only the ID codes for each respondent. Postcode data, which encompassed the number of dwellings each organisation manages within each postcode area, were entered into the third worksheet. The fourth worksheet was for reference use only, and contained the automatically generated numerical outputs (see Appendix 5).

3.3.3 Advanced analysis

Advanced data analysis, including cross-tabulations, were done in the Statistical Package for the Social Sciences (SPSS) spreadsheet by a consultant (see Appendix 5 for a summary of these cross-tabulations).

3.4 Data issues

Because the data collected for the Mapping Project were obtained from organisations via a mail-out questionnaire, data quality is affected by issues such as survey coverage, quality of response, non-response of survey recipients and missing data within returned surveys. These are each discussed below.

3.4.1 Scope and coverage

Some data (for example, the number of tenancies within individual boarding houses) were not collected, because it was agreed by the RC that the response rate would be improved if the survey was kept simple. Also, there would be some organisations within the Mapping Project's target group that did not receive the survey. For example, CHFA was unable to obtain a list of organisations from Aged and Community Services Australia (ACSA) due to issues of confidentiality. Whilst many of ACSA's members would have received the survey, it is likely that some did not. The same would be true for a number of smaller ecumenical housing providers throughout the country.

The survey instrument did not distinguish between CSHA and non-CSHA funded dwellings. There were a number of reasons for this decision. Primary amongst these is that many organisations are funded through multiple sources. Data on funding sources were collected, but did not identify the funding source for specific individual dwellings managed by an organisation. The RC agreed that respondents would find it difficult to complete the survey accurately if this level of detail was required.

3.4.2 Factors affecting reliability

The definitions and terminology used in the survey instrument had the potential to affect the reliability of response data. Some commonly used definitions, for instance, vary across jurisdictions. Understanding of definitions used in the survey was also likely to have varied slightly from respondent to respondent. To avoid as much misunderstanding as possible, the RC devoted a significant amount of time to ensure definitions used in the survey were clear and consistent. In addition, the pilot questionnaire sought comment regarding the adequacy of definitions (see Appendix 6).

Another factor affecting reliability concerns information capacity across jurisdictions. It is likely that lists of organisations provided to CHFA for some States/Territories were more comprehensive than others.

3.4.3 Quality of response

The administrative burden on organisations varies across and within jurisdictions and may have affected the response rate, which differed across jurisdictions (see Section 4, below).

Despite the care that was taken in designing the survey form and using simple, consistent definitions, some respondents may have had difficulty in understanding the survey form. There is also likely to have been a variation across respondents in their interpretations of the wording of different questions. This required some interpretation during the data entry phase of the project. For instance, some respondents ticked ‘capital funding’ against ‘rental income’ as a funding source, even though this box was shaded out and definitions of ‘capital’ and ‘recurrent’ funding were provided immediately below the table. In this instance, those responses coded ‘rental income’ as ‘recurrent funding’. However, in other instances where a misunderstanding may have occurred, data was entered as presented, there being no way of knowing whether or not the respondent had clearly understood the questions in the survey form.

Some data were collected more than once by the survey form. One example is the total number of dwellings managed by an organisation. In this instance, there was a variation in the total number of dwellings reported by respondents to each of the survey questions where this was asked. This difference can be accounted for by the missing responses to each question. Not all respondents answered all questions. As such, where similar data can be drawn from different questions, the results may differ slightly. Data used to report on such areas is always drawn from the most relevant survey question.

4 Findings

All findings are based on the number of responses for each question. A total of 1,735 survey forms were mailed out and 728 completed forms were returned. Of those surveys returned, 613 were in the target group and used for the analysis, a response rate of 35%. The response rates within jurisdictions were as follows: 72% in Tasmania, 54% in South Australia, 44% in Western Australia, 36% in the ACT, 34% in Queensland, 30% in Victoria and 25% in NSW (see Table 1 for more detail). All findings are based on aggregated national data. As such, data may not be comparable across jurisdictions because of the considerable variations in both the response rates and the way community housing operates in each jurisdiction.

The fact that 115 of the returned surveys had self selected as not being within the target group was to be expected: the dissemination of the survey deliberately cast a 'wide net' in order to capture data from the greatest possible range of organisations within the target group, and to reduce the risk of exclusion from the data collection. Where appropriate, the findings have been cross-referenced with the 2004-05 CSHA national data reporting for community housing.

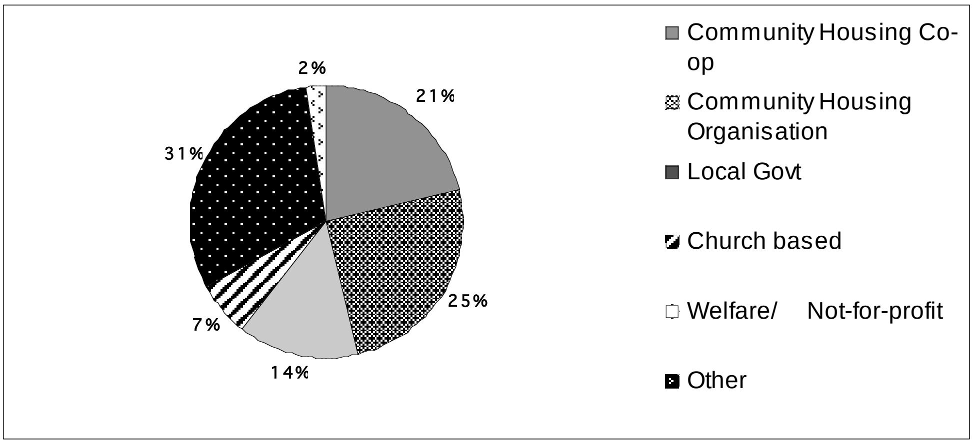
It should be noted that in some of the charts, and the tables from which they are drawn, the proportions shown do not add up to 100%. This is due to the fact that respondents were able to tick more than one box when answering some of the survey questions. For example, in Question 3, which asks about the provision of non-housing assistance, respondents indicated which type(s) of non-housing assistance they provided, if any. In many cases, respondents indicated that their organisation provided more than one type of assistance. Therefore, the proportions in Chart 37, which shows this data, add up to more than 100%.

4.1 Number and type of community housing organisations

The survey questions about size, location and number of dwellings were designed to give a simple overview of what organisations that provide community housing 'look' like.

The greatest proportion of organisations that responded were welfare/not-for-profit organisations (31%) followed by community housing organisations (25%) and cooperatives (21%). Local governments accounted for 14% of respondents and church-based organisations comprised 7% of the sample (see Chart 1).

Chart 1: Proportion of organisations, by type



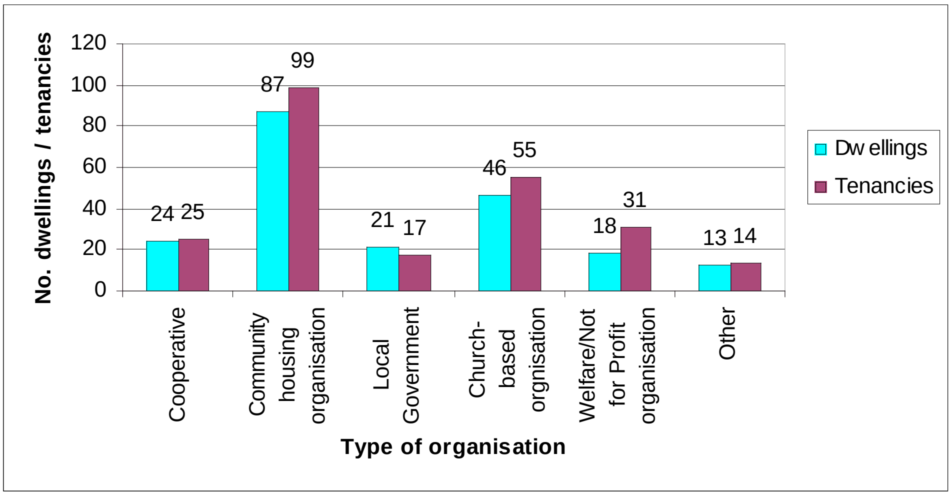
Note: Source data can be found in Table 2.

Although welfare/not-for-profit organisations comprise the largest number of organisations by type, community housing organisations manage more dwellings and tenancies than any other type of organisation. On average, community housing organisations manage 87 dwellings, over four times the number of dwellings managed by welfare/not-for-profit organisations, that is, 18 dwellings. Church-based organisations manage an average of 46 dwellings, followed by cooperatives at 24 dwellings and local government with 21 dwellings (see Chart 2).

The same holds true for the number of tenancies. Community housing organisations manage an average of 99 tenancies, three times more than welfare/not-for-profit organisations (31 tenancies) and four times more than cooperatives (25 tenancies; see Chart 2).

Local government organisations are the only organisation type to manage, on average, fewer tenancies than dwellings (17 tenancies and 21 dwellings; see Chart 2). It is likely this is the case because many local government organisations reported providing property management only for some or all of their dwellings. In these instances tenancy management would be provided by another organisation.

Chart 2: Average number of dwellings and tenancies, by type of organisation

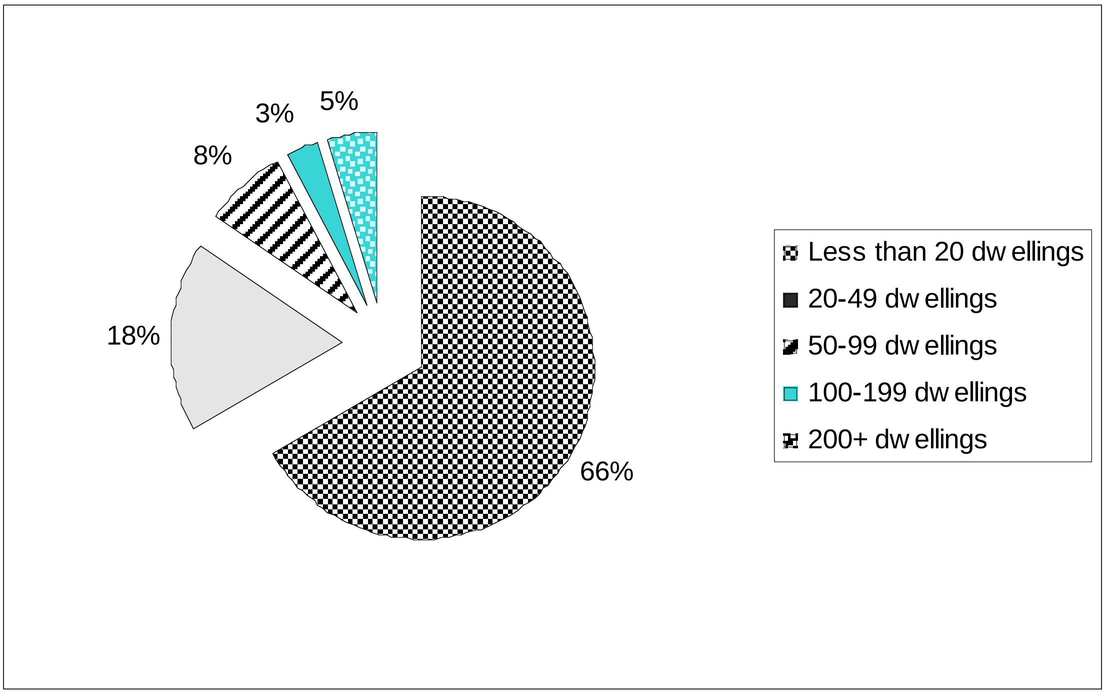


Note: Source data can be found in Table 3.

Regarding the size of organisations by the number of dwellings and tenancies, the responses indicated that most of the organisations are small, managing fewer than 20 dwellings (66%) and fewer than 20 tenancies (63%). Only 5% of all organisations have more than 200 dwellings and 200 tenancies (see Charts 3 and 4). This indicates that the community housing sector is dominated by a large number of small organisations managing a small number of dwellings.

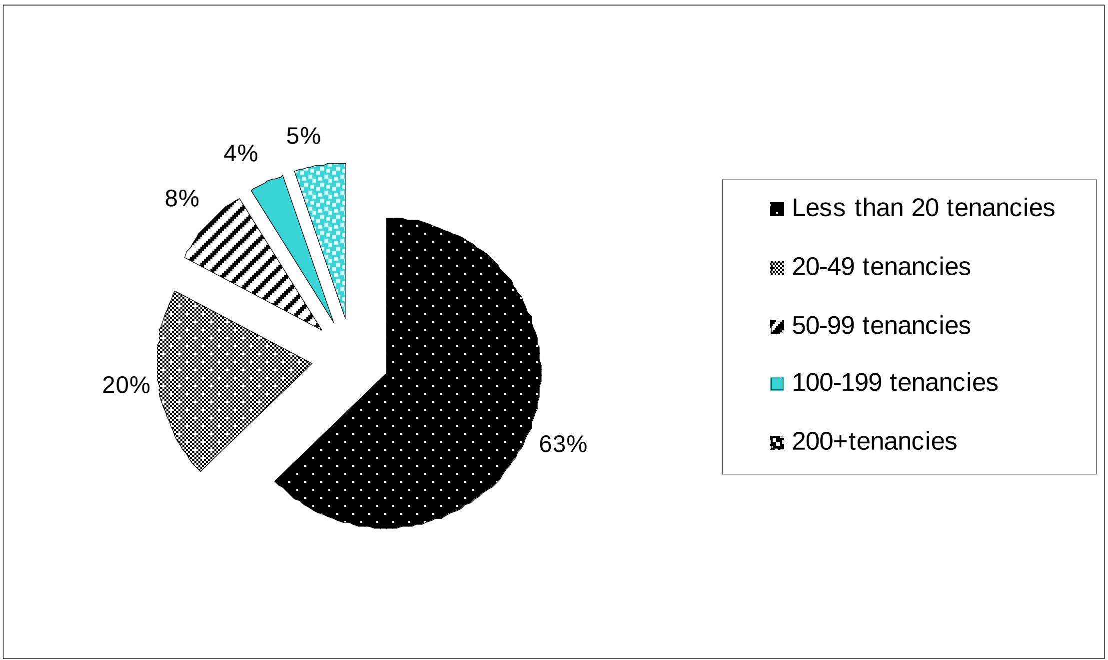
Organisations in all jurisdictions manage a higher proportion of tenancies to dwellings. This is especially so in the ACT and Victoria, as shown in Chart 5.

Chart 3 Size of organisations, by number of dwellings



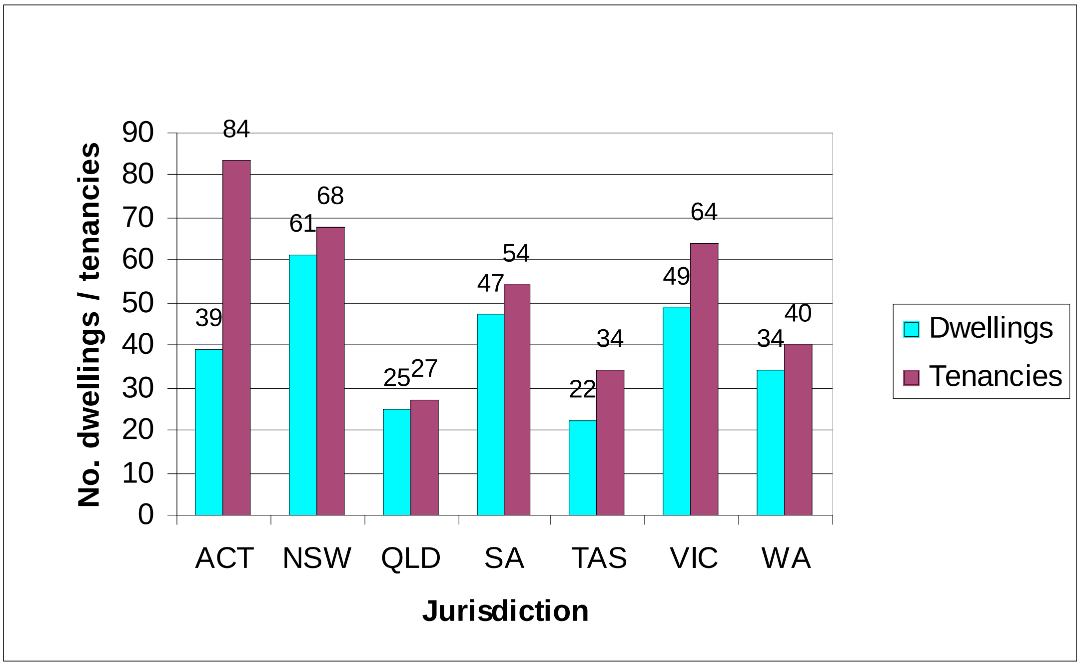
Note: Source data can be found in Table 5.

Chart 4 Proportion of organisations, by size of organisation



Note: Source data can be found in Table 6.

Chart 5 Average numbers of dwellings and tenancies per organisation per jurisdiction



Note: Source data can be found in Tables 7 and 8.

Chart 6 shows the number of dwellings by type that are managed by survey respondents. They reported management of 22,468 dwellings[32]. The AIHW 2005-06 CSHA national data reporting identified 28,582 households.[33] It should be noted, however, that the CSHA survey had a greater response rate than the Mapping Project (68% or more in each jurisdiction). If the Mapping Project had had an equivalent response rate, it is likely that a higher number of dwellings would have been identified than in the CSHA national data reporting. Although providers were not asked to identify what proportion (if any) of their dwellings are specifically funded through the CSHA, the overall number of dwellings identified in the Mapping Project data, as measured against the project's response rate, suggest that the Mapping Project was effective in reaching a wide range of providers throughout the country.

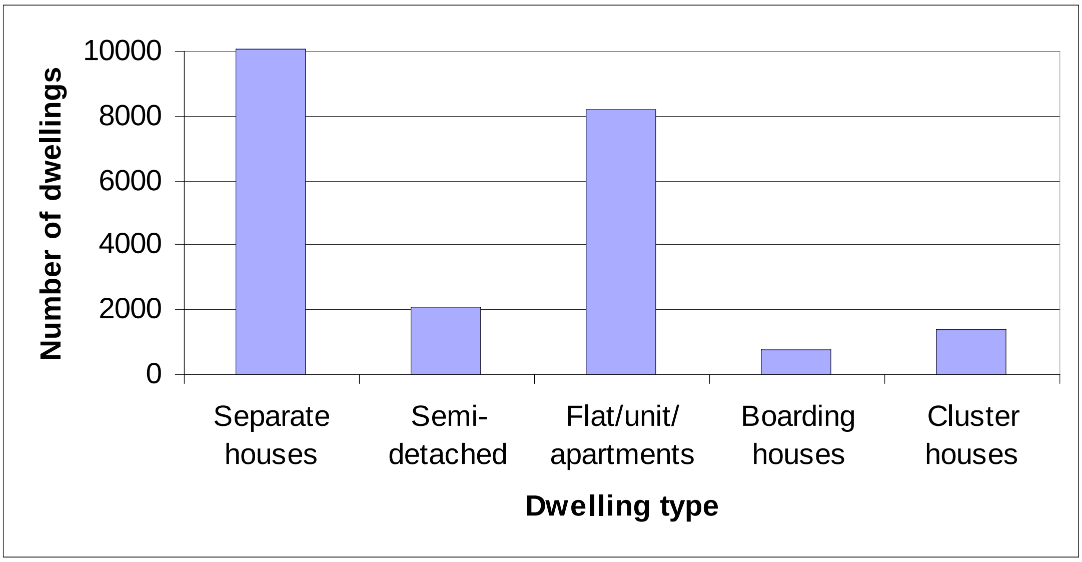
Separate houses and flats comprised the majority of the dwellings managed by respondents (10,065 and 8,179 respectively), representing 81% of all dwellings. Semi-detached (2,107 dwellings) and cluster houses (1,357 dwellings) representing 9% and 6% of all dwellings respectively; and boarding houses are the type with the smallest number (760 dwellings) in the sample, or 3% of all dwellings[34]. Further detail is available in Table 9.

[32] The data in Tables 11 and 30 respectively show a total of 24,103 and 23,656 dwellings reported as being managed by survey respondents. These differences can be accounted for by the missing responses to each question. Not all respondents answered all questions. As such, where similar data can be drawn from different questions, the results may differ slightly. It should also be noted that there is likely to have been a variation across respondents in their interpretations of the wording of different questions. The question that the data from Chart 6 (and Table 9) is drawn from related specifically to the number and type of dwellings under management. This data gives a more accurate impression of the total number of dwellings managed by the survey respondents. The data in Table 11 relates to the number of dwellings by region, and the data in Table 30 relates to the type of management of dwellings.

[33] Australian Institute of Health and Welfare (2007), p.8, p.11. The AIHW data refers to "households" rather than "dwellings". The figures are only comparable for broad illustrative purposes.

[34] Organisations were not asked about the number of tenancies within each type of dwelling. Given the nature of boarding houses, the total number of tenants housed within them is likely to comprise a significant proportion of the overall tenancies. However, as a proportion of dwelling types, boarding houses represent a small portion of overall dwellings.

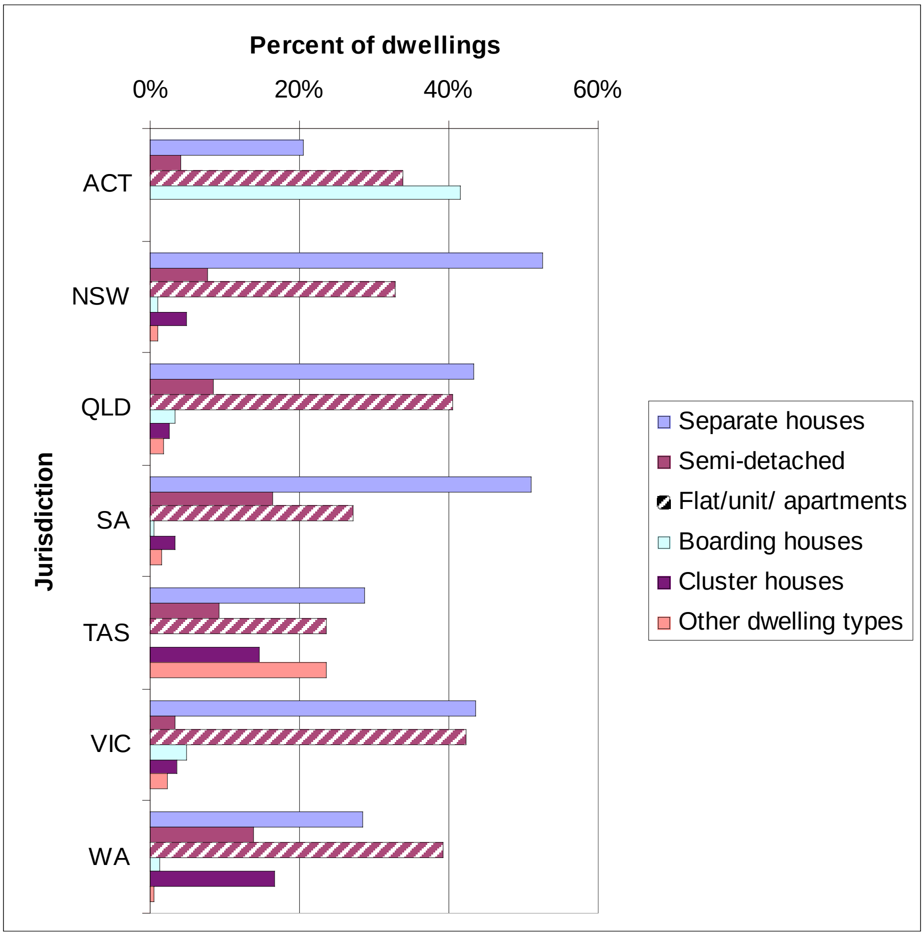
Chart 6 Number of dwellings by type—national



Note: Source data can be found in Table 9.

The proportion of different dwelling types is broadly similar across the country, with the exception of the ACT and Tasmania. The ACT recorded a higher proportion of both boarding houses and flats than any other type of dwelling. This is likely due to the predominance in the ACT sector of one provider that manages a substantial amount of boarding house accommodation. Western Australia and Tasmania reported a higher proportion of their dwellings as cluster housing than did other jurisdictions (17% and 15% respectively; see Chart 7). Tasmania also reported the highest proportion of 'other' dwelling types (24%; see Chart 7).

Chart 7 Proportion of dwellings by type, by jurisdiction



Note: Source data can be found in Table 10.

The majority of dwellings managed by survey respondents are in major cities and inner regional areas (60% and 22% respectively). Community housing in remote and very remote areas is scarce, accounting for only 4% of dwellings (see Chart 8).

Regarding the breakdown by jurisdiction, dwellings were classified by post code using the Australian Standard Geographical Classification (ASGC). The city-state nature of the ACT accounts for all dwellings classified as located in a major city. Conversely, Tasmania has no dwellings counted in a major city region. This is because the ASGC does not count any city in Tasmania to be a major city. Among the jurisdictions, Queensland's community housing is most evenly spread between major cities and inner and outer regional areas.

Western Australia and Queensland are the only jurisdictions with community housing in very remote areas. New South Wales and Victoria, the most populated states, reported no remote or very remote dwellings (see Chart 9). The proportions shown in Chart 9 are broadly similar to those identified by the CSHA national data collection 2004-05.[35]

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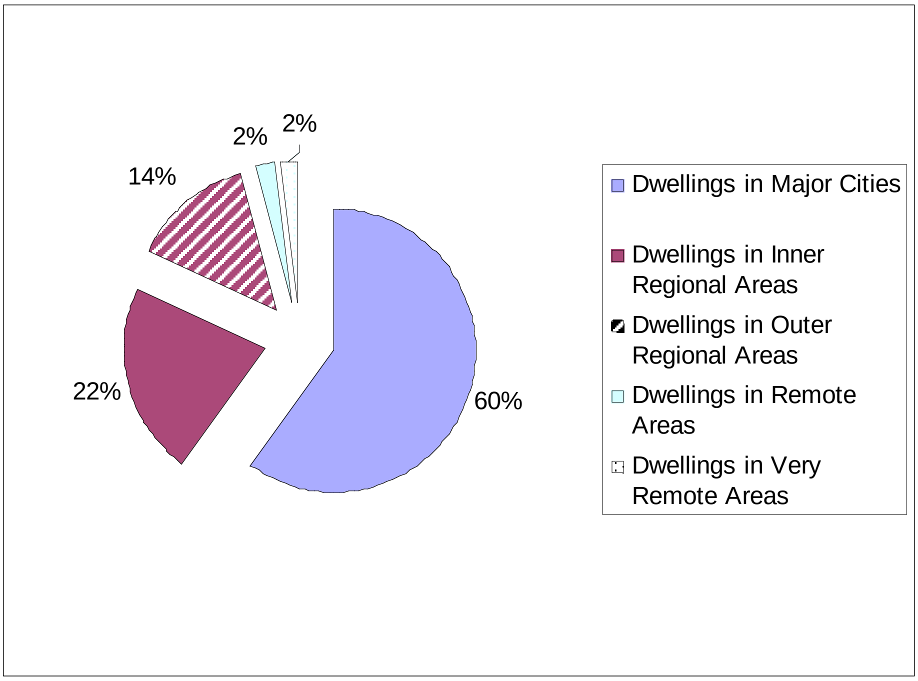
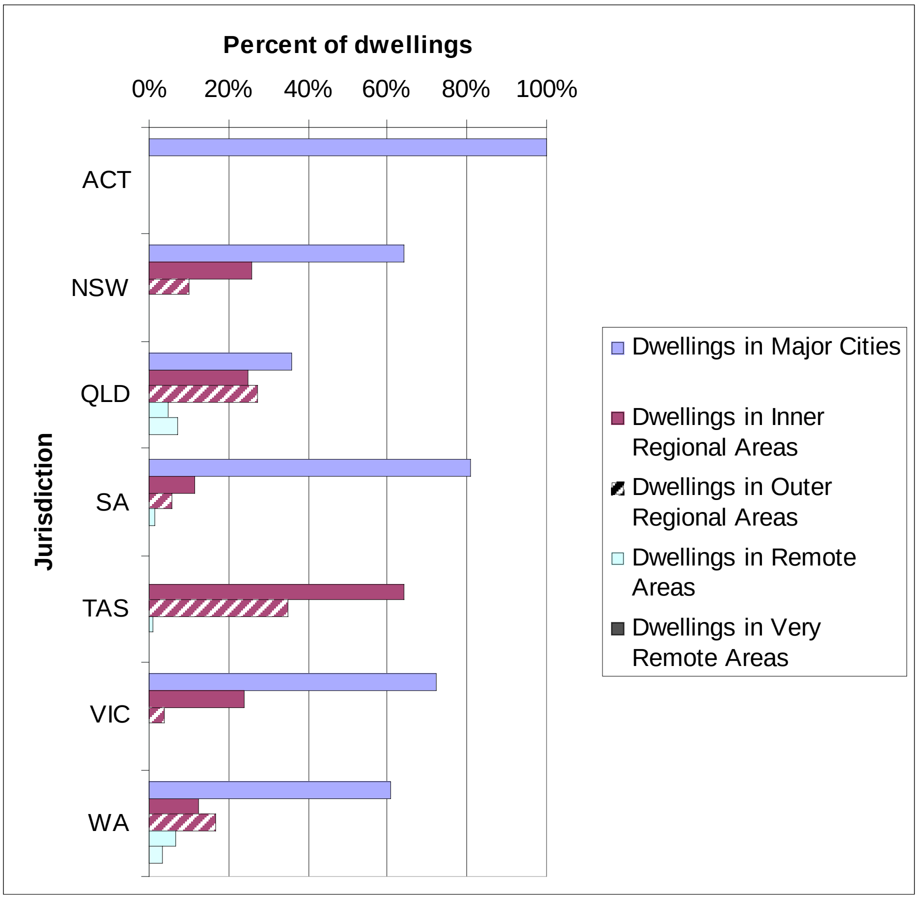
[35] Australian Institute of Health and Welfare (2006), p.11.

Chart 8 Proportion of dwellings, by region



Note: Source data can be found in Table 11.

Chart 9 Proportion of dwellings by region, by jurisdiction

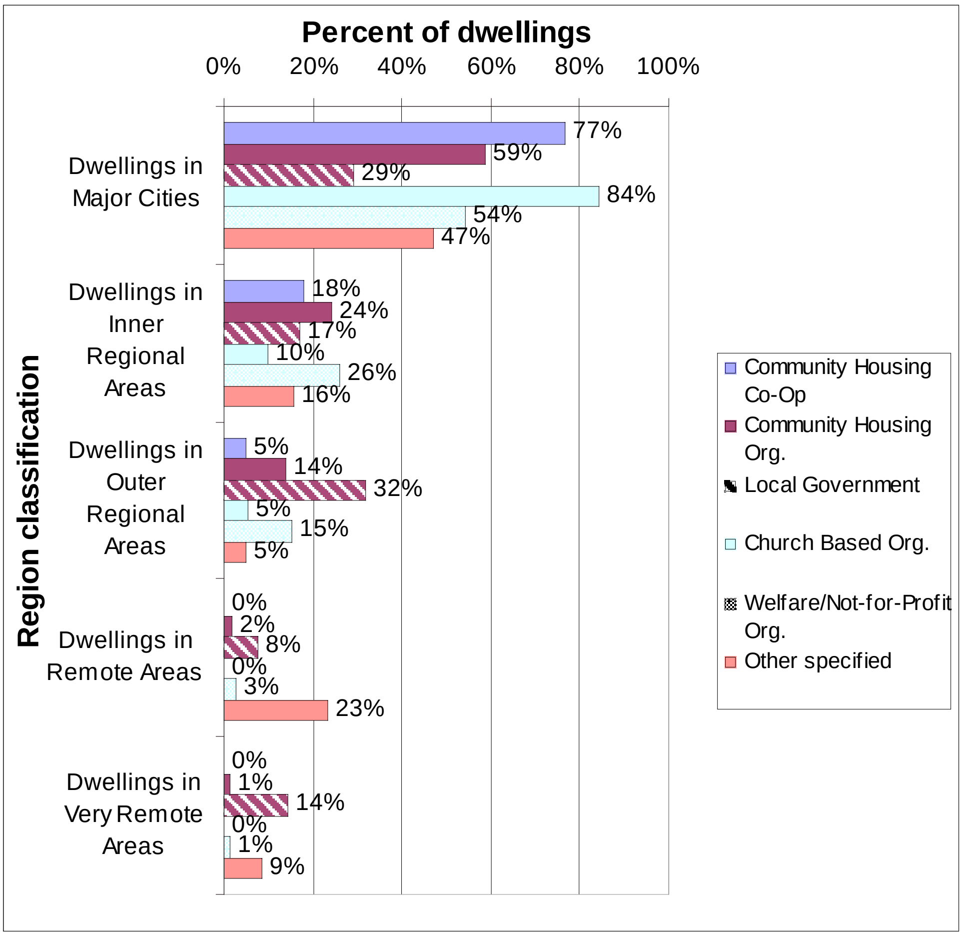


Note: Source data can be found in Table 12.

The majority of dwellings managed by church-based organisations are located in major cities (84%), with a further 10% in inner regional areas. Most cooperative managed dwellings are also located in major cities (77%), with a further 18% in inner regional areas. Less than 1% of cooperative managed dwellings are located in remote and very remote areas. The situation is similar for community housing organisations which have 59% of their stock in major cities and 24% in inner regional areas.

Among welfare/not-for-profit organisations, two fifths of their dwellings are located in inner and outer regional areas. Local government organisations manage dwellings with the greatest geographical distribution. While 46% local government dwellings are located in major cities and inner regional areas, 40% are in outer regional and remote areas, and a further 14% of their dwellings are in very remote areas, the biggest proportion in that ASGC regional classification of all organisations.

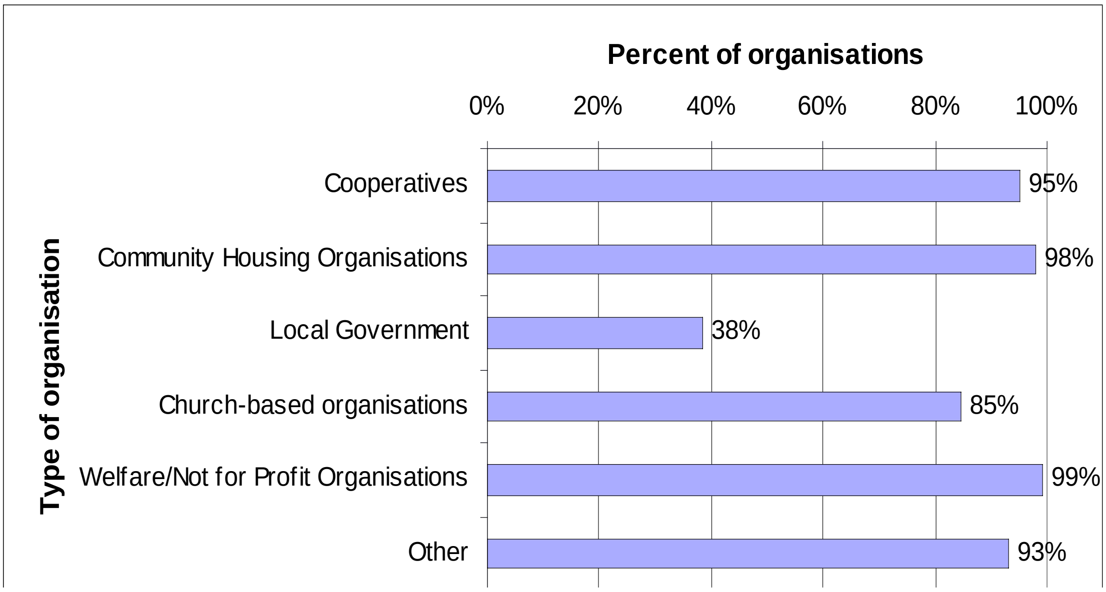
Chart 10 Proportion of dwellings in different regions, by organisation type



Note: Source data can be found in Table 13.

To provide some information on governance the survey also asked about organisations' boards of management structure and activity. Chart 11 shows the proportion of organisations governed by a board of management, and where organisations are managed by a board, the requirements of these boards. Nearly all welfare/not-for-profit, community housing organisations, and cooperatives are governed by a board of management (99%, 98% and 95% respectively). Somewhat fewer church-based organisations (85%) have boards of management and local government have the least at 38%. This is not surprising, given that for both of these groups housing may only be one service or program they provide, and management would come under a different structure. Many local government respondents qualified their responses with a comment that Councillors constituted their board of management. Therefore, this proportion could reflect the number of Councillors rather than 'traditional' boards of management.

Chart 11 Proportion of organisations governed by a Board of Management, by type of organisation



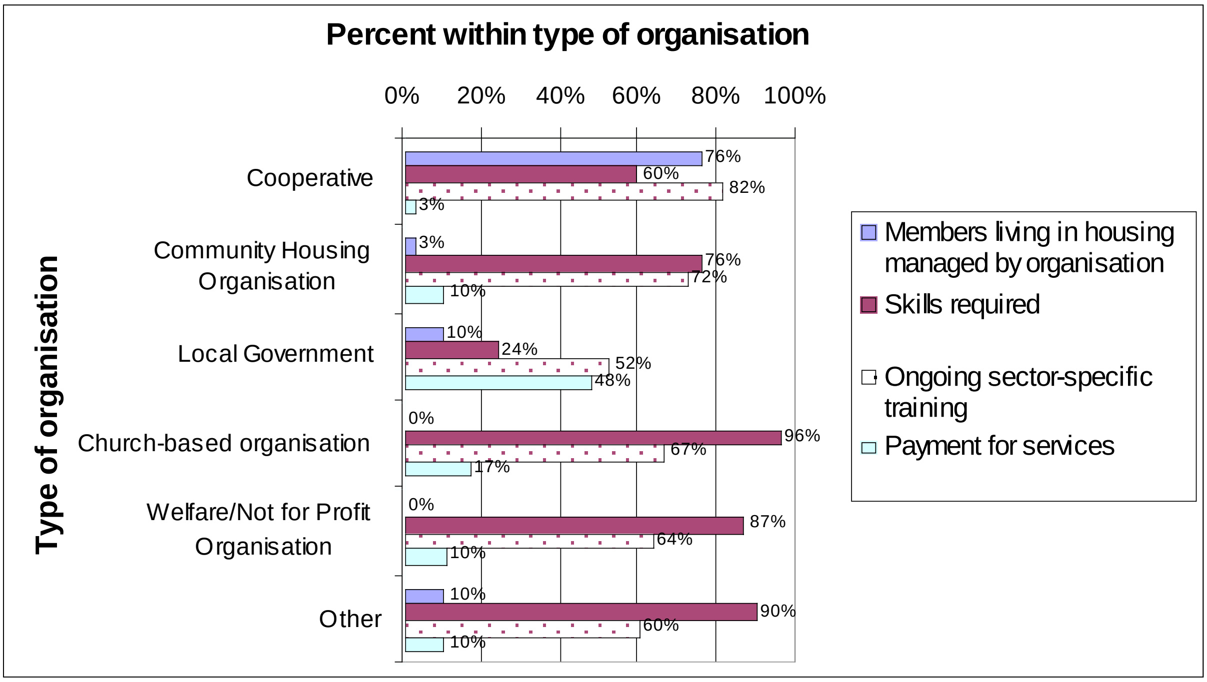
Note: Source data can be found in Table 14.

Chart 12 details board participation requirements, by organisation type. The majority of survey respondents offer ongoing sector training to their Board members, with cooperatives and community housing organisations offering the highest proportion of training (82% and 72%), followed by church based organisations (67%). Seventy-six per cent of cooperatives require their Board members to be living in the cooperative's housing, which is not surprising given the nature of the cooperative model.

A high proportion of church-based and welfare-not-for-profit organisations required certain skills of their board members (96% and 87% respectively). These high proportions may be reflective of the greater amount of non-housing assistance that they provide and the requisite skills for such support (see Section 4.5). Three quarters (76%) of community housing organisations require a skilled board, followed by cooperatives, where this figure is 60%. Only 24% of local government organisations require certain skills of their board. See Table 15 for further information.

Cooperatives, in keeping with their tenant managed nature, are the least likely of all organisation types to provide any form of payment for the services of their board members (3%). Local governments are far more likely than other organisation types to offer payment (48%). As noted above, this figure is likely to be disproportionate to other organisation types given that many respondents from local governments commented that their boards included Councillors. Payment to board members is not common among the other types of community housing, accounting for small proportions across community housing and welfare/not-for-profit organisations (10% each; see Table 15).

Chart 12 Requirements for board participation, by organisation type



Note: Source data can be found in Table 15. Respondents could identify multiple requirements for board participation.

4.1.1 Number and Type of Organisations—Summary

Who manages community housing?
- 31% of respondents are welfare or not-for-profit organisations.
- 25% are specific community housing organisations.
- 21% are community housing cooperatives.
- 14% are local government organisations.
- 7% are church-based organisations.

Dwelling and tenant distribution
- On average, community housing organisations manage the most dwellings; four times as many dwellings as welfare/not-for-profit organisations.
- Community housing organisations also manage, on average, the highest number of tenancies.

Size of organisations
- The community housing sector is comprised of a large number of small organisations each managing a small number of dwellings and tenancies.

Size of the sector
- Survey respondents reported managing 22,468 dwellings.
- 81% of these are separate houses and flats (10,065 and 8,179 respectively). A further 2,107 of these are semi-detached dwellings.

Distribution
- The majority of dwellings managed by survey respondents are in major cities and inner regional areas (60% and 22% respectively).
- Community housing in remote and very remote areas is scarce.

Boards of management
- The majority of all organisations are governed by a board of management, with the exception of local government organisations.
- A high proportion of church-based and welfare/not-for-profit organisations require certain skills of their boards.

4.2 Funding

Tables 16, 17 and 18 (see Appendix 2) provide cross-tabulations between capital and recurrent funding received by organisations from SHAs. The most common form of income is recurrent rental income, which provides a funding/income source to 509 organisations (83%, see Table 19). Of the 613 respondents, 63% report that they receive no capital or recurrent funding from their SHA (see Table 16). While this figure is high, considering the number of organisations known to be in receipt of funding through the CSHA, it is possible that many organisations responding to the survey are not aware of the source of the funding that they receive from other bodies. In South Australia, for instance, at the time of the data collection, organisations receiving funding from the SHA, then known as the South Australia Community Housing Authority (SACHA), passed a proportion of their rent on to SACHA and received property management services for major and cyclical maintenance from SACHA. As such, it is likely that many of the SA respondents did not consider that their organisations receive direct funding from SACHA. Likewise in Victoria, organisations such as the Common Equity Rental Cooperatives (CERCs) may have considered their funding to come from Common Equity Housing Limited (CEHL), the umbrella body that manages the CERCs. In both of these cases survey respondents may also have indicated that they do not receive recurrent rental income, because they are passing on this income to another body. Despite this, money from the CSHA is being channelled into these housing providers.

Other respondents may not have been aware of capital funding from SHAs if this was granted many years ago, before their association with that organisation. For instance, in WA the SHA, the Department of Housing and Works (DHW), only provided capital funding. As such, none of the 119 respondents from WA should be in receipt of any recurrent funding from DHW, relying instead on their rental income or other sources of finance.[36]

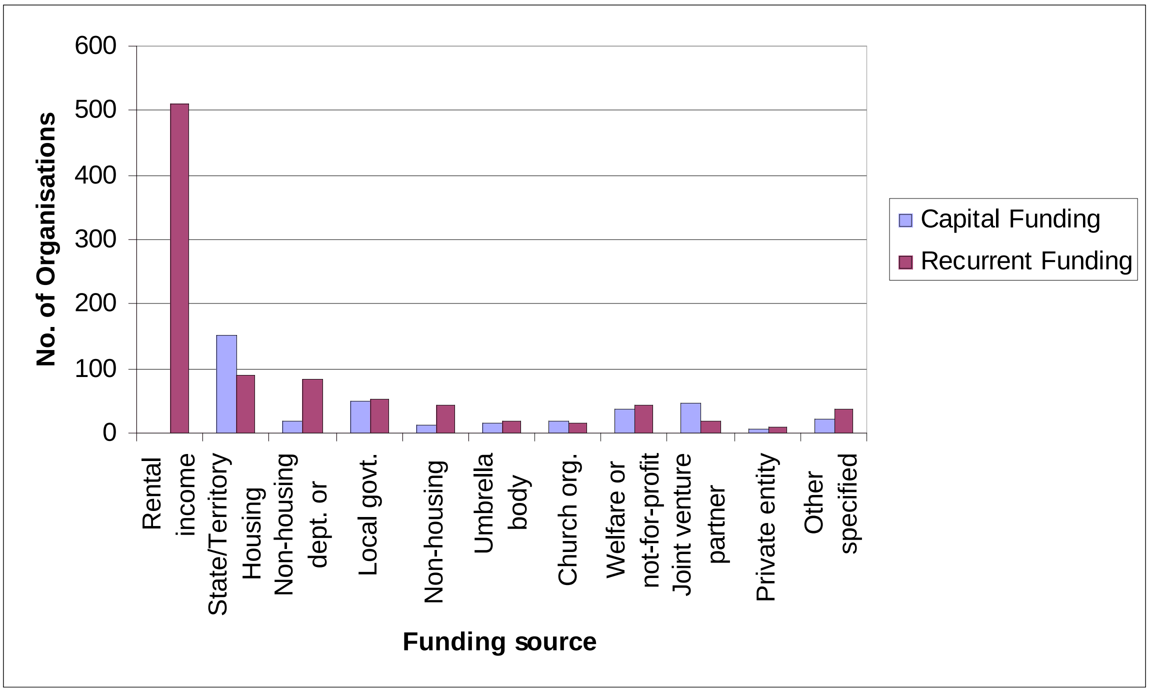
Chart 13 illustrates the funding sources across all types of organisations. The most common funding sources after recurrent rental income are capital and recurrent funding from SHAs (153 and 90 organisations respectively).

Charts 14-19 show funding sources by type of organisation. Church-based organisations, community housing organisations and cooperatives are slightly more likely to use their recurrent rental income to fund their operations than other organisation types (97%, 96% and 93% respectively). Cooperatives are more likely than other organisations to receive funding or income from an umbrella body. This is consistent with models in place in a number of jurisdictions which have been set up to fund cooperatives, such as CEHL in Victoria and Community Housing Canberra in the ACT. Welfare/not-for-profit organisations receive the highest proportion of funding from non-housing departments within State/Territory governments. This is to be expected, given the high degree of non-housing assistance that such organisations provide to specific target groups (see Sections 4.4 and 4.5 below).

[36] It is worth noting, however, that two respondents from WA indicated that they received funding from their SHA. It is possible that these organisations were referring to some other source of government funding.

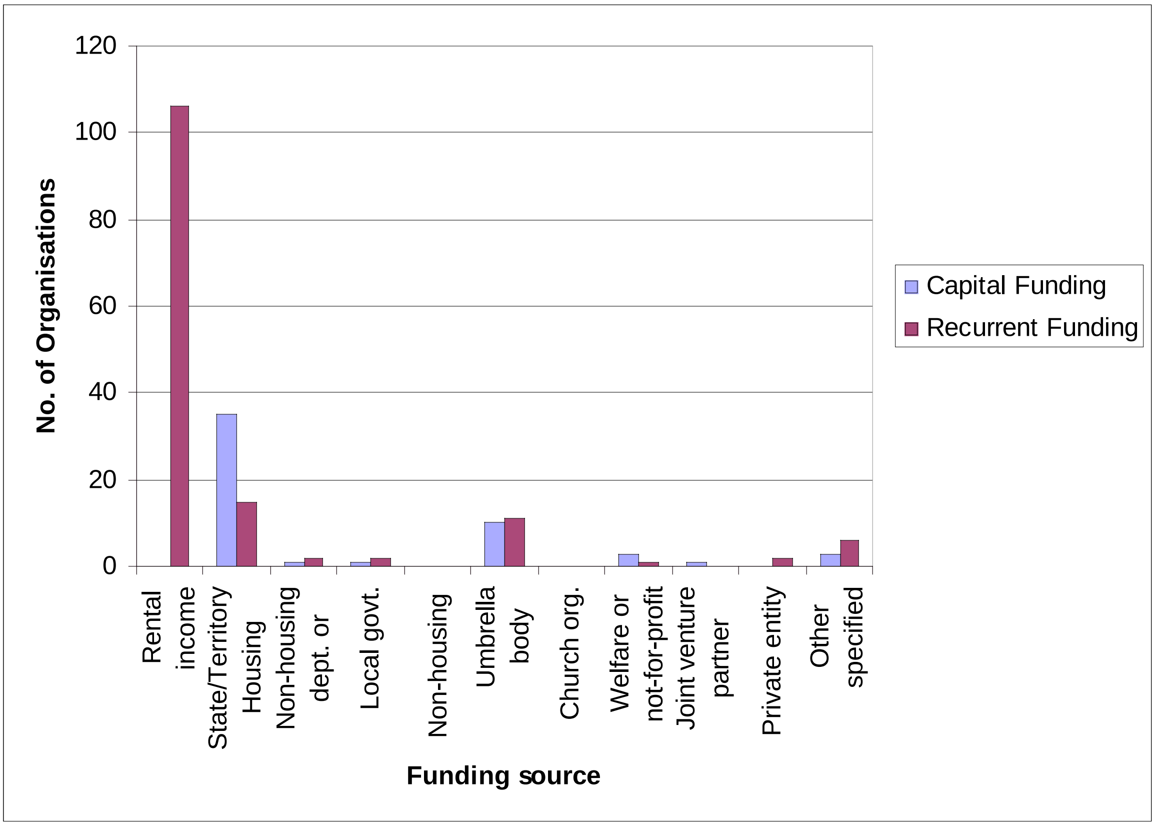
This information is drawn from Table 19. Tables 20 and 21 provide cross-tabulated data on capital and recurrent funding sources by type of organisation by jurisdiction (see Appendix 2).

Chart 13 Funding/income sources for all types of organisations



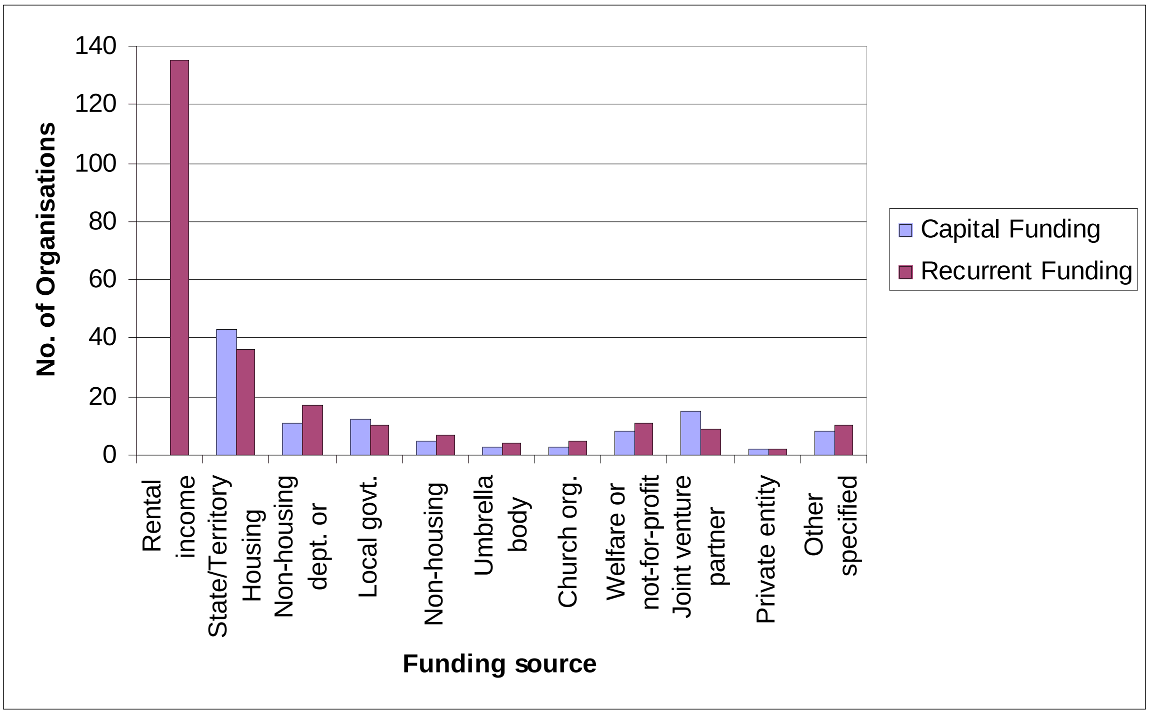
Note: Source data can be found in Table 19.

Chart 14 Funding sources—cooperatives



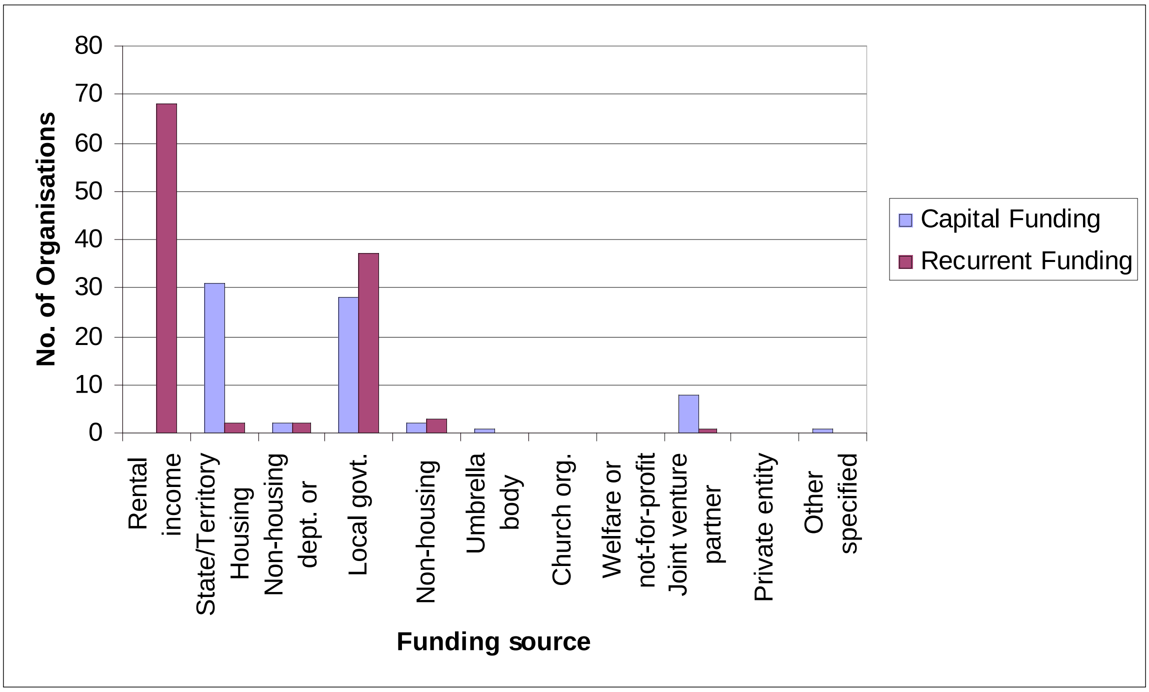
Note: Source data can be found in Table 19.

Chart 15 Funding sources—community housing organisations



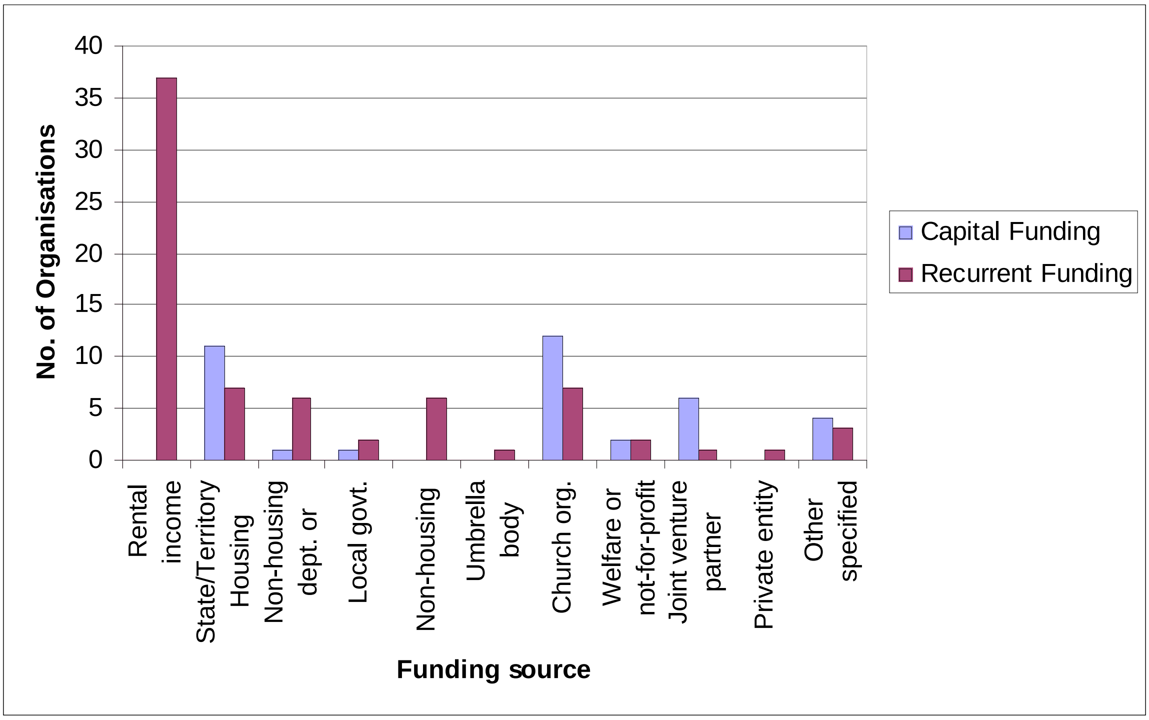
Note: Source data can be found in Table 19.

Chart 16 Funding sources—local governments



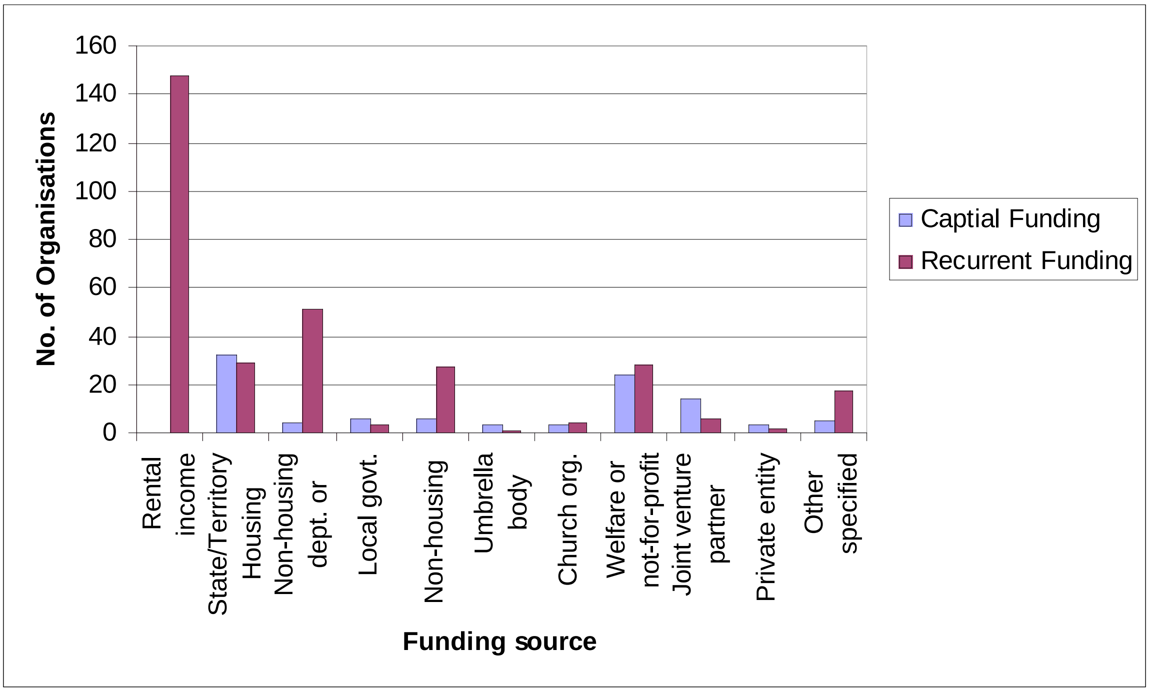
Note: Source data can be found in Table 19.

Chart 17 Funding sources—church-based organisations



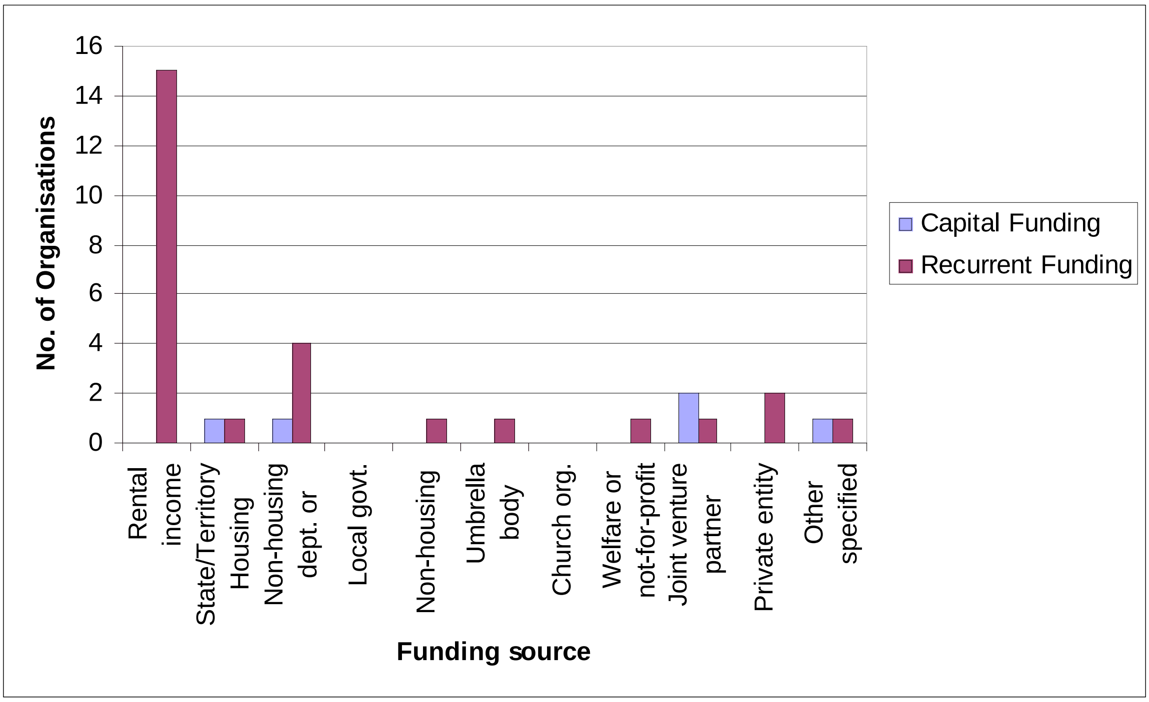
Note: Source data can be found in Table 19.

Chart 18 Funding sources—welfare / not-for-profit organisations



Note: Source data can be found in Table 19.

Chart 19 Funding sources—'other' organisations



Note: Source data can be found in Table 19.

4.2.1 Funding—summary

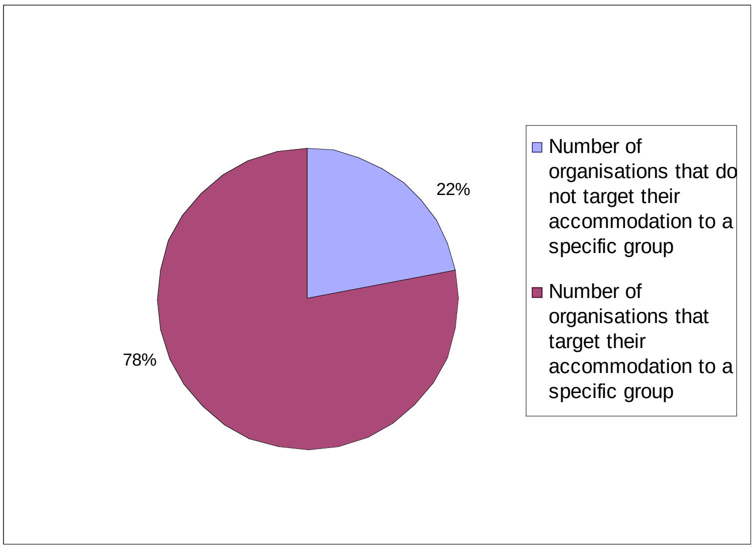
- 63% of organisations report they receive no funding from their SHA. It is possible, however, that many organisations who receive funding through an umbrella agency, or who received a capital grant many years ago, are not aware these funds came from their SHA.
- The most common source of income is recurrent rental income, which is a funding source for 83% of organisations.

4.3 Targeting

Survey participants were asked whether they target specific tenant groups, other than low-moderate income earners. Although detailed information about who is presently being housed by organisations was not sought, the responses to this question provide an insight into what types of people are likely to be provided with accommodation by the community housing sector in Australia. It is probable that this data is reflective, to some extent, of the population already housed across the sector.

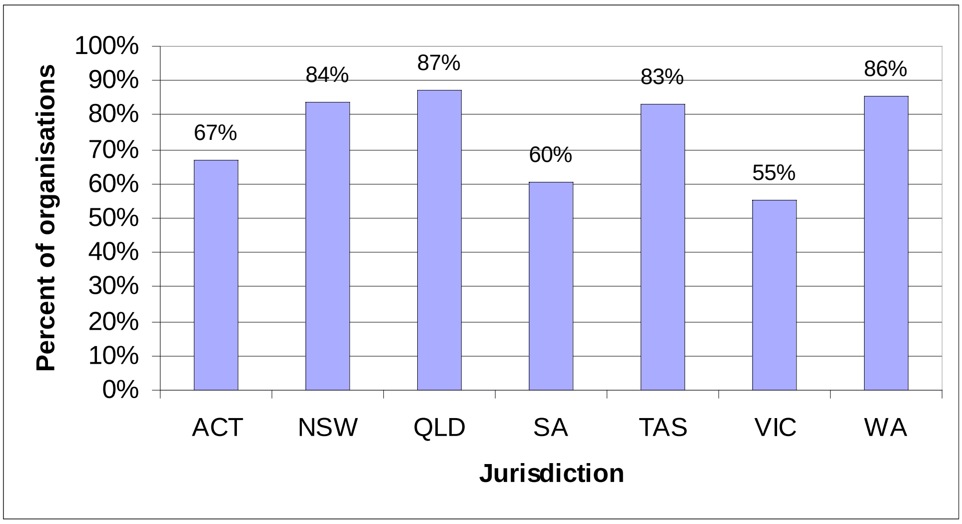
Chart 20 shows that the majority (78%) of organisations in the survey sample target their accommodation to specific groups other than low-moderate income earners. Chart 21 shows organisations in Victoria are less likely than those in other jurisdictions to target specific groups (55%). Further details can be found in Table 22.

Chart 20 Proportion of organisations that target one or more specific groups—national



Note: Source data can be found in Table 22.

Chart 21 Proportion of organisations that target one or more specific groups, by jurisdiction



Note: Source data can be found in Table 22.

Chart 22 illustrates the proportion of different population groups that are being targeted by organisations. People aged over 65 years and people with disabilities are targeted by the highest number of organisations (37% and 36% respectively). These two groups were followed by “other” groups. It is worth noting, however, that a large proportion of respondents in this category specify that they target “over 50s”, “over 55s” and “over 60s”. As such, the proportion of people within a broader category of “aged” would comprise the majority of those groups targeted by organisations. Homeless people and people under 25 years of age are also targeted by a large number of organisations (25% and 23% respectively). Detailed information can be found in Table 23.

Although respondents could indicate more than one target group, of the groups that do target, the majority (74%) target only one or two groups (56% and 18% respectively). See Table 24 for further details.

Charts 23-33 show the target groups for different organisation types. Chart 34 shows a summary of the data from Charts 23-33, to facilitate comparisons between the groups targeted by different organisation types. Community housing organisations are more likely to target many “high needs” groups, such as people with a mental illness or people with alcohol and other drug dependencies than other organisation types, including church-based and welfare/not-for-profit groups.

Community housing organisations are the most likely organisation type to target women escaping domestic violence (34%; see Chart 23). Homeless people are most likely to be a target group for church-based and community housing organisations (46% and 39% respectively; see Chart 24).

People with alcohol and other drug dependencies and ex-offenders are less likely to be targeted than the above-mentioned groups. However, community housing organisations are far more likely than the other organisations to target their accommodation to this group (see Charts 25 and 27). Only one local government organisation (1% of this organisation type) targets people with alcohol and other drug dependencies, and no local government organisation targets ex-offenders. Instead, local governments are the most likely organisation type to target people who are over the age of 65 (see Chart 32).

Thirty-eight per cent of community housing organisations indicate that they target Indigenous people, far higher than other organisations, which ranged between 8% and 13% (see Chart 26). As well, community housing organisations are more likely to target people with disabilities, mental illnesses, people under 25 years of age and students (see Charts 26, 28, 29, 31 and 33 respectively).

Church-based groups, community housing organisations and cooperatives were the most likely to target people from culturally and linguistically diverse backgrounds (24%, 21% and 19% respectively; see Chart 30). A majority of local government organisations (73%) target aged people, followed by community housing organisations (43%; see Chart 32).

Chart 34 allows for a comparison of what organisation types target different tenant groups. Detailed data at a jurisdictional level can be found in Table 25.