PROJECT 1.54 PROCURING SOCIAL AND AFFORDABLE HOUSING

SOCIAL PROCUREMENT CRITERIA

Judy Kraatz

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Preface

The Sustainable Built Environment National Research Centre (SBEnrc), the successor to Australia's Cooperative Research Centre (CRC) for Construction Innovation, is committed to making a leading contribution to innovation across the Australian built environment industry. We are dedicated to working collaboratively with industry and government to develop and apply practical research outcomes that improve industry practice and enhance our nation's competitiveness.

We encourage you to draw on the results of this applied research to deliver tangible outcomes for your operations. By working together, we can transform our industry through enhanced and sustainable business processes, environmental performance and productivity.

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1. Executive summary

> *'Social procurement is when organisations use their buying power to generate social value above and beyond the value of the goods, services, or construction being procured' (Victorian State Government 2018).*

The 19 *social procurement criteria* developed in this research are intended to provide support in developing policy initiatives and delivering program outcomes related to social and affordable housing in Australia. They provide a checklist that aims to ensure expansive and agile thinking, and to leverage (possibly latent) opportunities.

These criteria have been developed as an outcome of current SBEnrc research into three inter-related components of: (i) changing demographics and housing typologies; (ii) traditional and emerging social procurement approaches; (iii) funding and financing approaches. They were also informed by insights gained from a 360 Degree Survey which provided feedback on key questions arising from these three elements of research. Previous SBEnrc research[1] has also informed their development. In particular, the *productivity-based conceptual framework* and the *nine domains approach*[2] are integral to these final criteria.

System focus	Builds partnerships
	Builds housing pathways
	Builds diversity in housing stock
	Builds financial capacity of system

Supply chain focus	Stimulates industry-wide innovation
	Supply chain maturity
	Builds sector capacity
	Successful models/pilots

Organisational focus	Benefits/outcomes measurement (life trajectory and financial)
	Time frame for benefits realisation
	Integrated service and asset delivery
	Manages risk distribution

Person focus	Addresses diverse cohort needs
	Addresses diversity, choice and aspirations in housing needs
	Builds financial capacity of individuals
	Supports sustainable and affordable living outcomes

Flexibility	Agility and responsiveness
	Appropriate scalability
	Location-specific responsiveness

The criteria were also tested and evaluated against three case studies in three Australian States. In New South Wales, this was using the Department of Family and Community Services (FACS) Outcomes Framework and journey through housing approach, and the Ivanhoe Redevelopment. In Queensland, this was through looking at the Youth CONNECT social benefit bond and Youth Foyer

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[1] See *Rethinking Social Housing* http://www.sbenrc.com.au/research-programs/1-31-rethinking-social-housing-effective-efficient-equitable-e3/ and *Valuing Social Housing* http://www.sbenrc.com.au/research-programs/1-41-valuing-social-housing/

[2] Community, economy, education, employment, environment, health and well-being, housing, social engagement and urban amenity.

State Government initiatives. In Western Australia, it was through the Affordable Housing Strategy 2010–2020: Aiming Higher Strategy which brought together Federal and State funding with the Keystart shared equity program, to produce outcomes such as the One on Aberdeen project.

The final proposed criteria should be considered as a checklist to help align the social procurement approach with desired benefits to help optimise the investment risk equation. It is not anticipated that all criteria will be relevant to applications, as there will be various unique considerations. It is, however, anticipated that each criteria can be considered as a part of early decision-making, and then set aside for further investigation. Those which make a shortlist will depend on various issues such as: asset and/or service being procured; who is procuring (e.g. government agency or Community Housing Provider); and the location of the service and/or asset (this will vary with state, city, regional or remote area).

2. Introduction

This element of our research aims to develop social procurement criteria to assist decision-makers in determining the most appropriate procurement pathways in a specific situation. This is being informed by previous and current SBEnrc research, and by the other elements of this current research project. From this, we have identified a need for social procurement solutions which:

- Look to the future in terms of changing demographics.
- Consider emerging community expectations for housing typologies in the context of social cohesion, building community and resource efficiency.
- Can target changing and niche needs and lead to the provision of housing on land well located for holistic social and affordable housing developments.
- Sit within an appropriate and effective regulatory environment to ensure financially sound and socially responsible investment.
- Can be effectively funded through sustainable government funding schemes, subordinate loans, guarantees and equity.

It is from this background, that the social procurement criteria presented below have been developed, to support those developing policy initiatives and delivering program outcomes related to social and affordable housing in Australia. They provide a checklist that aims to ensure expansive and agile thinking, and to leverage (possibly latent) opportunities.

The development of the *social procurement criteria* described here was informed by other elements of SBEnrc *Project 1.54 Procuring Social and Affordable Housing*[3], including research on: changing demographics and typologies; social procurement approaches; and funding and financing approaches; a 360 Degree Survey of industry participants; and three State-based case studies used to test the draft criteria (Figure 1).
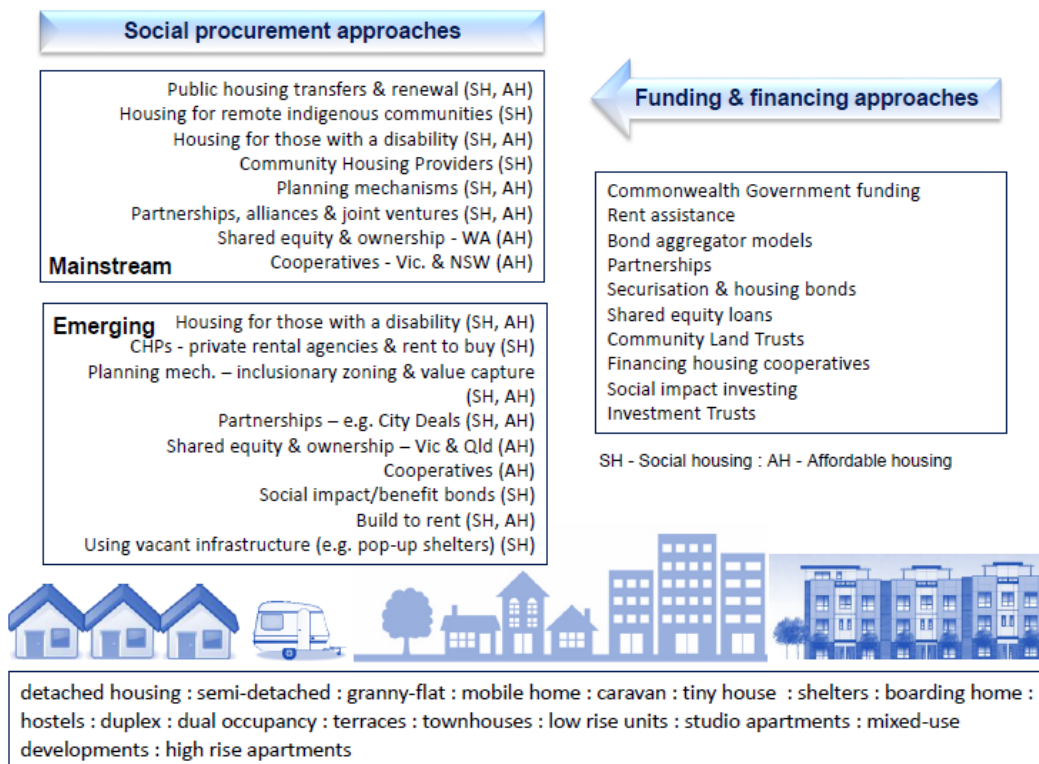
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[3] http://sbenrc.com.au/research-programs/1-54/

Figure 1 – Research elements informing development of the social procurement criteria
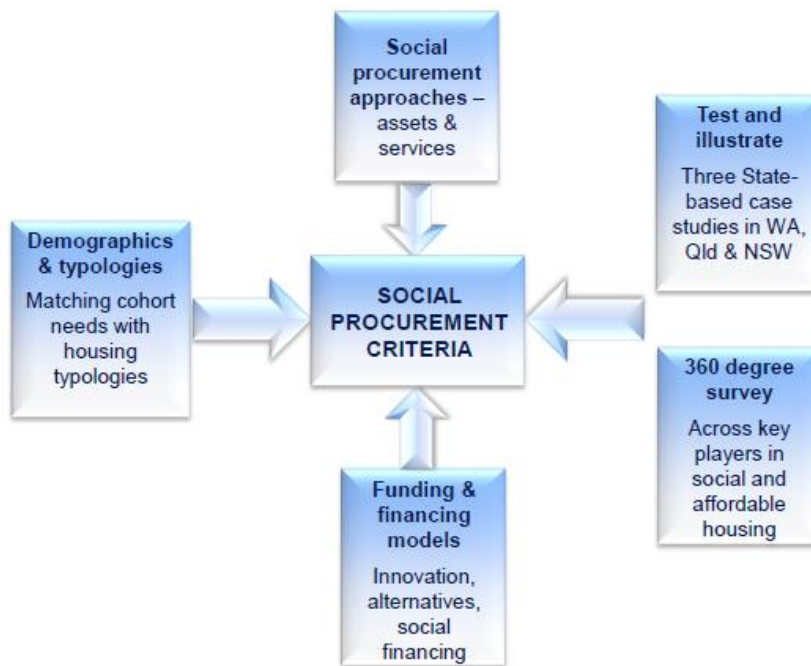
A significant array of social value procurement approaches, and funding and financing models have been identified in parallel research. See also *Social Procurement Approaches Report*[4] and *Funding and Financing Approaches Report*[5] (Figure 2).

Figure 2 – Social procurement and funding and financing approaches informing social procurement criteria development


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[4] http://sbenrc.com.au/app/uploads/2018/03/SBEnrcP1.54SocialProcurementApproachesReport.pdf
[5] http://sbenrc.com.au/app/uploads/2018/06/SBEnrc-P1.54-Funding-and-Financing-Approaches-Report-FINAL.pdf

In addition, the *Demographics and Typologies* element of this project has also informed thinking as these criteria were developed (Figure 3).

Figure 3 – Demographics and housing typologies informing the social procurement criteria
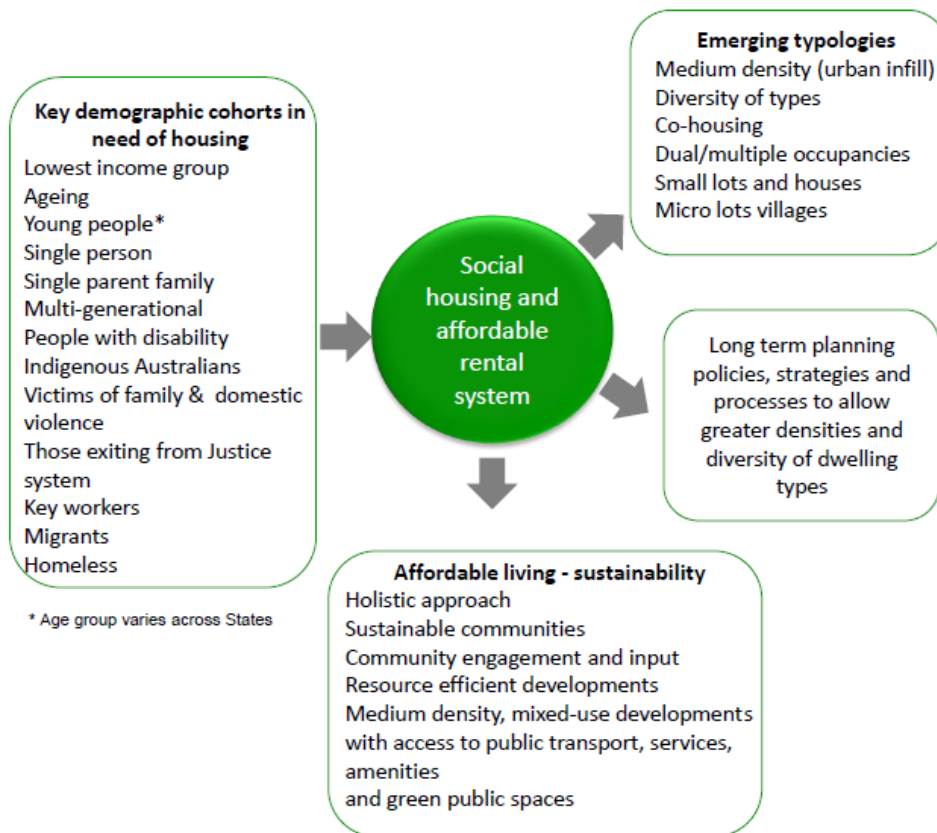
The social procurement criteria identified in this research were tested against a series of cases from New South Wales (NSW), Queensland (Qld) and Western Australia (WA).

- In NSW, using: (i) the FACS Outcomes Framework and journey through housing approach; and (ii) the Ivanhoe Redevelopment (Chappell 2017, Chilvers 2017, Curran 2017, NSW Planning and Environment 2018).
- In Qld, against: (i) the social benefit bond development by Qld Treasury; and (ii) Youth Foyers as part of the *Queensland Housing Strategy 2017-2027*, where social benefit was the key priority, with housing as an avenue for achieving this.
- In WA, against: (i) the Affordable Housing Strategy 2010–-2020: Aiming Higher Strategy; and (ii) the Keystart shared equity program, for example through the One on Aberdeen project.

The research was done to assist those developing social procurement policy and procuring social and affordable housing to optimise this procurement. Through a checklist approach (some may not be applicable in the specific circumstance) it is intended that these social procurement criteria can help align the approach with the desired benefits, and help optimise the investment risk equation. By considering available social procurement approaches through the lens of each of the 19 proposed criteria, it is intended that procurement efficiency can be improved through providing greater clarity, consistency and transparency, and that the strengths and weaknesses of the various approaches can be better considered.

With regards to risk-sharing and distribution, several dimensions have been suggested by the literature, including asset-based, delivery, changing demographic profiles, general economic, structural and financial, agency or issue-specific, budget, lagging maintenance, inflationary housing prices, and social outcome/impact measurement capabilities (Hall and Berry, 2003; Farha, 2017).

Figure 4 provides an effective illustration of the housing continuum, clarifying the social and affordable housing spectrum which this research is addressing (x axis = salary).

Figure 4 – The housing continuum – a Sydney example (Chappell 2017)
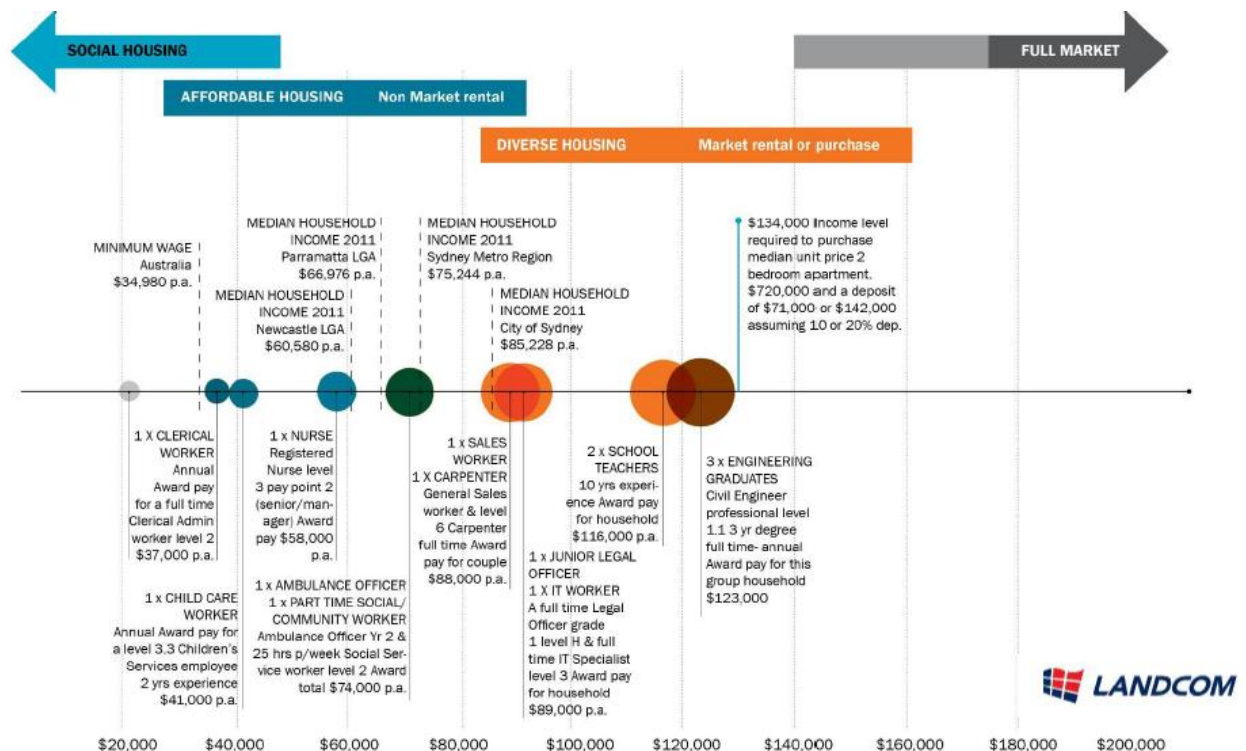
3. Social procurement

In NSW, the Social Procurement Action Group defines social procurement as 'the generation of social value through purchasing and procurement processes. In other words, social procurement is another way that public bodies can achieve their social objectives (alongside more traditional approaches to achieving these objectives) (SPAG 2012). Since that time, NSW has adopted a commissioning approach, through which 'government policy is outcomes focused/client-centred commissioning and contestability to achieve better outcomes for clients through new forms of internal and external engagement and shared responsibility between the government and non-government sector'.

In Queensland 'social procurement refers to how Queensland Government spending can be used to support social priorities. By leveraging even a small slice of the government's spend to add social value, communities and suppliers across the state can benefit enormously' (QDHPW 2017a).

Burkett (2010) provides a context of, and tools for, social procurement in Australia. The author identifies four foci for social procurement; (i) policy (to ensure 'supplier delivery on social impact objectives'); (ii) contract (including specifications and contracts); (iii) supplier (developing suppliers and building capacity); and (iv) market development. Suppliers can include social enterprises, businesses and firms and not-for-profit organisations (NFPs). Policy tools include universal impact targets; targeted procurement; compliance enforcement provisions; and a supplier code of conduct. Contract tools discussed include: social clauses; unbundling larger contracts so that smaller parts have social impact specifications; social tendering and social benefit sub-contracting; and specific purchasing agreements.

In addition to those sources quoted in the report, other useful resources include:

- Victorian State Government (2018). *Victoria's social procurement framework: Building a fair, inclusive and sustainable Victoria through procurement*. Melbourne, Australia.
- Treasury, N. Z. (2018). *Social Investment*. Retrieved 5 March 2018, from http://www.treasury.govt.nz/statesector/socialinvestment
- Office of the Chief Advisor (Qld) (2017a). *Social procurement guide: Adding social value when buying for government*. Brisbane, Australia, Qld Department of Housing and Public Works.
- HACT, et al. (2016). *Social Value and Procurement: A toolkit for housing providers and contractors - The tool bank*. (The tool bank. UK, HACT).
- Newman, C. and Burkett, I. (2012). *Social Procurement in NSW: A Guide to Achieving Social Value through Public Sector Procurement*. Sydney, Australia.
- Victorian Department of Planning and Community Development (2010). *Social Procurement: A Guide for Victorian Local Government*. Melbourne, Australia.

For clarity, the focus of this research is around *public works with social outcomes*. Furneaux and Barraket (2014) provide a description of the various types of social procurement (Figure 5).

Figure 5 – Types of social procurement (adapted from (Furneaux and Barraket 2014)

Adapted from Furneaux and Barraket 2014

Victoria's social procurement guide (2018) discusses two broad approaches: (i) direct procurement for the 'purchasing of goods, services or construction works (by government or through the supply chain) from: a. Victorian social enterprises; b. Victorian Aboriginal businesses; or c. other social benefit suppliers, including Australian Disability Enterprises'; and (ii) indirect procurement, 'using the tendering process and clauses in contracts with the private sector to seek social and sustainable outcomes for Victorians'. They do not explicitly discuss this for the procurement of social and affordable housing.

Figure 6 provides a broad example of the more explicit links between cohorts, housing typologies and the social benefits to be procured via social procurement. This will be expanded upon in each of the cases discussed later in this report.

Figure 6 – Examples of social procurement – public works with social outcomes (Type 2)

Cohort	Examples of housing elements/typologies	Examples of social benefits to be procured	Examples of procurement approaches
Single parent	Access to open space Higher space needs Good lighting	Employment Education	Public housing; partnerships, CHPs
Ageing	Accessible design Lesser space needs Community access	Health services Community	Public housing; partnerships, CHPs
Key workers	Accessible to workplace Lesser space needs High density OK	Employment Transport	Shared equity, cooperatives, inclusionary zoning

Social housing cohorts include single parents, people with a disability, women & children escaping DV, elderly, those with chronic illness, people from an Indigenous background, humanitarian refugees
Affordable housing cohorts – as above plus key workers
Note: DV – domestic violence

Clarity in the planning phase is needed for successful outcomes (Furneaux and Barraket 2014, Queensland Department of Housing and Public Works 2017a), including:

- The type of proposed procurement as per Figure 5.
- Identification of core outcomes; i.e. motivation, context, understanding and measurement of impact.
- The availability of appropriate suppliers.
- Undertaking a social value analysis, identifying opportunities, risks and issues, and using this to brief potential suppliers and tenderers.
- The social benefits which will ensue.
- Identification of risks and mitigation strategies; e.g. holding briefings with potential suppliers and tenderers, checking for potential conflicts of interest.
- Identification of potential innovations in delivery and market development opportunities, and if discovered, looking to longer term strategies if needed.

Additional issues include: identifying affected communities and their social priorities; what are the agency's priorities; can this support supplier diversity such as small or regional businesses; are there opportunities for collaboration; are there flow-on or peripheral services (Queensland Department of Housing and Public Works 2017a)?

Clarification of risk, understanding who faces risk, and the mitigation strategies which are needed to ensure outcomes are achievable, is needed to ensure the future effectiveness of social procurement strategies, is important. Table 1 outlines some of the risks, benefits and risk mitigation strategies for three approaches to social procurement (prescriptive, non-prescriptive and mixed category risks as well as benefits.).

Table 1 – Risks and benefits associated with different approaches to social procurement clauses (Queensland Department of Housing and Public Works 2017a)

| Approach	Benefit	Risks and mitigations
Prescriptive	Suits procurement initiatives where the buyer has a very clear understanding of social benefit requirements and how they want them delivered. Provides clarity to potential suppliers on the social benefits being sought by the buyer. Measurable indicators of success are readily built into contractual arrangements. Government can clearly demonstrate leveraging procurement spend to support social outcomes. Buyers can better target their spend to address specific priorities.	May present challenges for some potential suppliers who lack experience in delivering on social benefits or outcomes. This can be mitigated by undertaking appropriate 'meet the buyer' events and / or dedicated pre-market soundings or supplier capability building strategies. Potential mainstream suppliers can be linked to social benefit suppliers, peak bodies, support and intermediary organisations and resources.
Non-prescriptive	Suits procurement initiatives where social benefit opportunities, including the capacity of the supply market, are not well understood by the government buyer. Encourages potential suppliers to aim high in their determination of what social benefits they can deliver. Encourages potential suppliers to build capability in delivering social benefits alongside goods and services.	Tenders may contain conservative estimates of social impacts to ensure they are within cost estimates and that any impacts declared are more easily delivered. May be more difficult to develop measurable performance indicators. If social considerations are to be 'weighted' in tender evaluations, comparisons between tenderers may be difficult.
Mixed	Suits procurement initiatives where government buyers understand the social benefits they want to generate, but don't understand the best way to achieve them. Allows government buyers to direct the nature of social outcomes (e.g. employment for people with disability) while encouraging innovative solutions as to *how* outcomes are to be delivered.	Vague or incomplete specifications might deter some potential suppliers. This can be mitigated by undertaking appropriate 'meet the buyer' events and / or dedicated pre-market soundings or supplier capability building strategies.

4. Case studies for testing the criteria

Three case studies were used to highlight what well developed state-based policy can contribute to on-the-ground social and affordable housing outcomes. These were chosen to provide a broad cross representation of social procurement approaches against which to test the criteria, and to illustrate how the criteria can be used in policy, program and project development.

- In New South Wales (NSW), the *Human Services Outcomes Framework* and a *person-centred journey through housing* approach and its contribution to the development of the Ivanhoe Redevelopment were used. This provides an example of the use of *planning mechanisms* and *portfolio renewal*.
- In Queensland (Qld), *social benefit bonds* and *youth foyers* (partnerships) as part of the Queensland Housing Strategy 2017-2027 were used. , where social benefit was the key priority, with housing as an avenue for achieving this.
- In Western Australia (WA), the journey from the *Affordable Housing Strategy 2010–2020: Aiming Higher Strategy* brought together federal (NRAS) funding, the Keystart shared equity program and multi-sector partnerships to provide the context for a substantial expansion in supply of social and affordable housing in that state. The *One on Aberdeen* development in inner city Perth is an example of the success of this program.

4.1. From an Outcomes Framework to outcomes – a NSW case

The NSW *Human Services Outcomes Framework*[6] defines seven key domains which aim to address the long-term wellbeing of those receiving support and care: social and community, employment, safety, home, education and skills, economic and health (Chilvers 2017). This framework can then be used to identify what matters across an individual's life span (Figure 7), key aspects of their housing journey, and impact pathways.

Figure 7 – What matters across an individual's life span (Chilvers 2017)
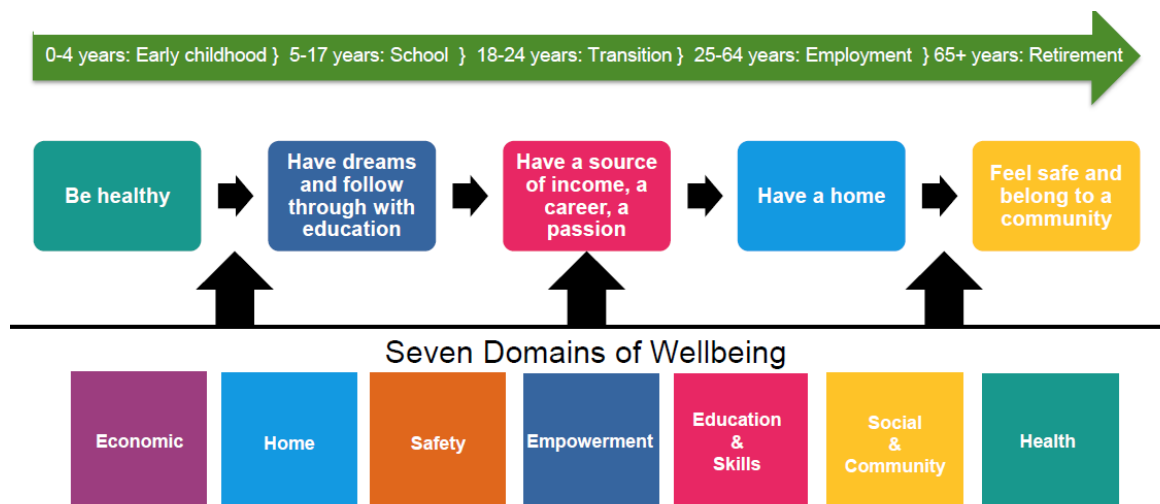
Through defining an individual's housing pathway, the challenges they have experienced can be made apparent, and these challenges can potentially be addressed to maintain progress in both life and housing outcomes (Figure 8).

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[6] https://www.facs.nsw.gov.au/resources/human-services-outcomes-framework

Figure 8 – Journey through accommodation support (Chilvers 2017)
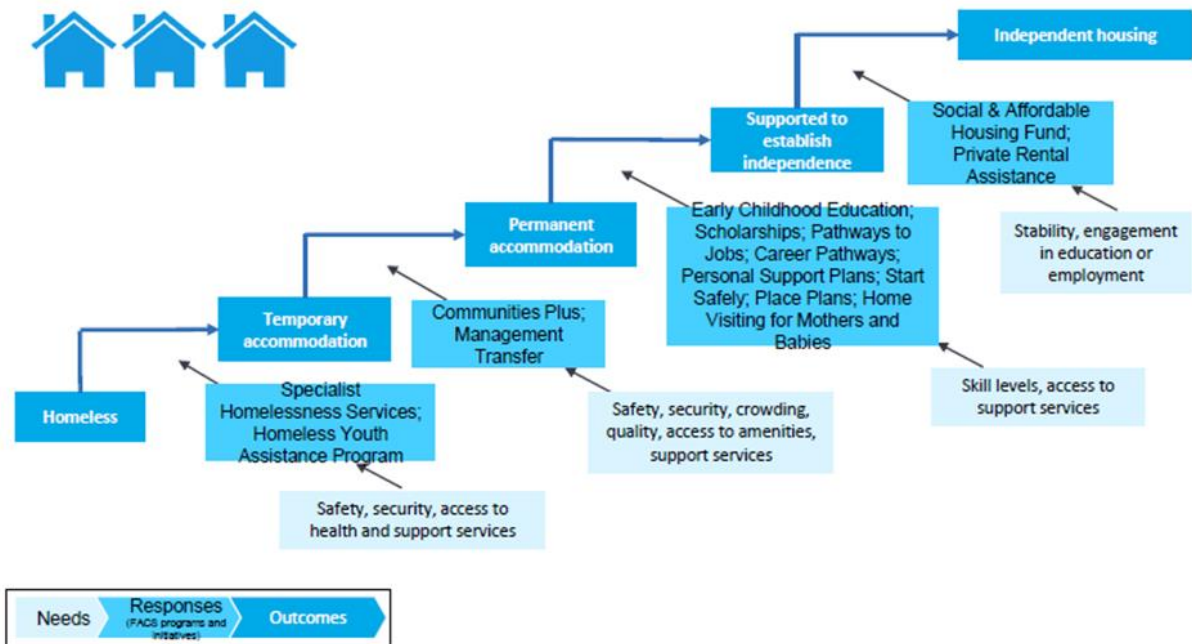
The rigour of the NSW Family and Community Services'(FACS) approach enables the gathering of evidence, attribution and data from which a business case can be made to procure both assets and wrap-around person-centred social services. One example of how this approach is being translated into delivery is with the Ivanhoe Estate[7] (Figure 9). This integrated social housing development provides an important example of both estate renewal and partnerships (between NSW Land and Housing Corporation (a division of FACS) and the Aspire Consortium, including Mission Australia Housing, Frasers Property Australia and Citta Property Group) between public, private and CHP participants. The concept design for this development is currently available for public consultation.

This is a mixed use development (gross floor area of 283,500m^2) which will include up to 3,500 private, social and affordable housing dwellings; residential care facilities and self-contained dwellings for seniors along with educational, community and retail developments. "Approximately 1,000 social housing and 128 affordable housing dwellings are proposed" (NSW Planning and Environment 2018). This is a part of the broader Macquarie Park redevelopment[8] which is an existing commercial and light industrial area adjacent to Macquarie University, and which is on a major train line.

A further example is the Waterloo social housing estate currently in the concept planning stage, as a part of the new Waterloo metro station development (NSWGovernment 2018)[9]. This will be a mixed use development established around the new station, and will include 700 residential units, with 20 per cent being social rentals.

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[7] http://www.planning.nsw.gov.au/Assess-and-Regulate/Projects/Ivanhoe-Estate/Concept-design
[8] http://www.planning.nsw.gov.au/macquariepark
[9] https://www.communitiesplus.com.au/major-sites/waterloo

Figure 9 – From Outcomes Framework to outcomes – a New South Wales example
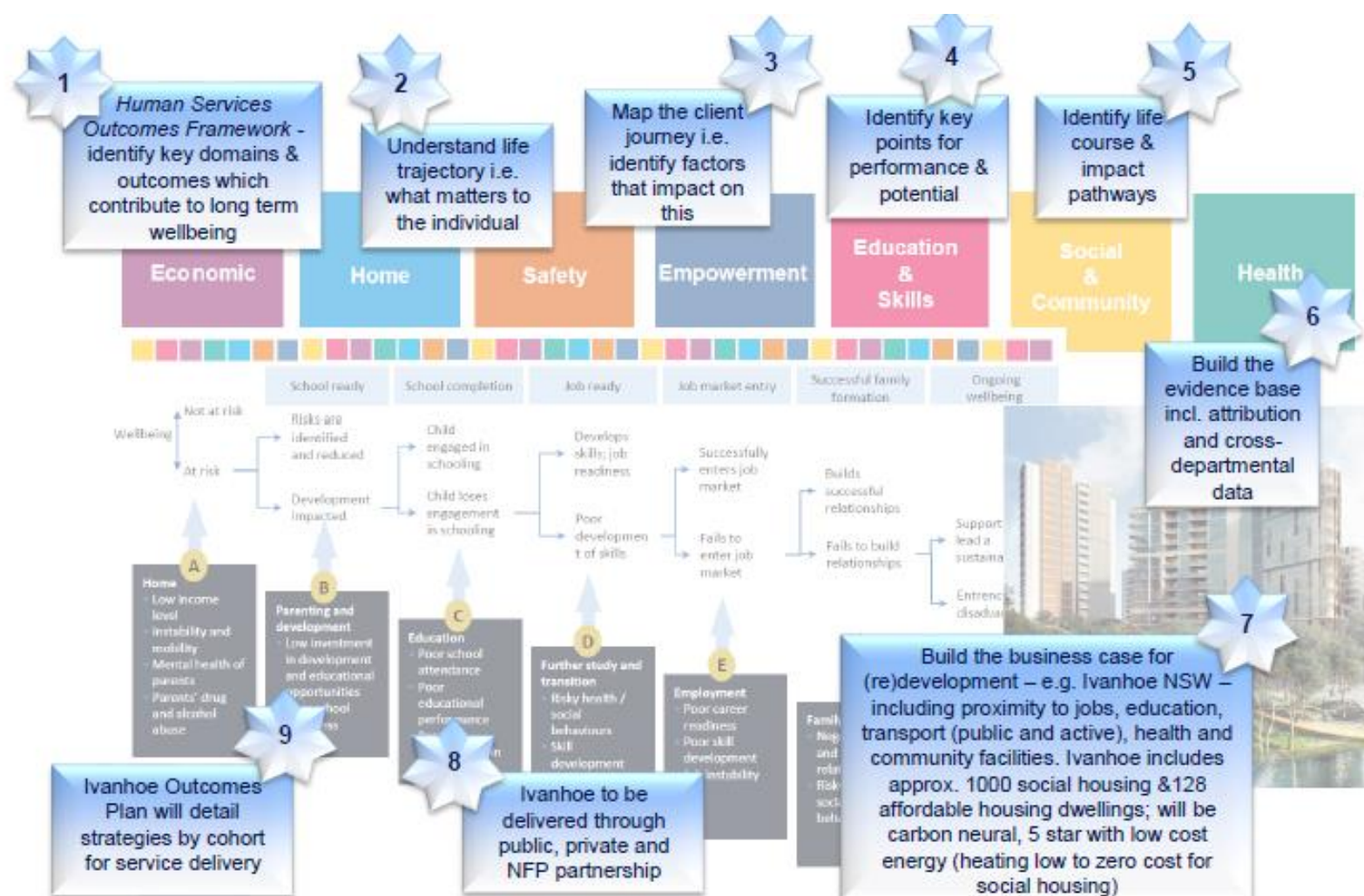
Compiled from Chilvers 2017 and Curran 2017

4.2. Housing for at-risk youth – a Qld case

Two different social procurement approaches are being implemented in Queensland to provide housing for homeless youth, or those at risk of homelessness. Whilst this further extends the discussion from social and affordable housing, it provides insights into two of the social procurement approaches being used to test the proposed criteria. One strategy through Queensland Treasury is via the *Social Benefits Bond* program[10]. The second, through the Queensland Department of Housing and Public Works, is through *Youth Foyers*[11] (Figure 10), which provides another strong example of partnerships between public, private and CHP participants.

Queensland Treasury is piloting social benefit bonds (SBBs) to achieve: a greater focus on the delivery of client outcomes, with the government only paying for outcomes delivered; 'increased investment in early intervention and prevention, which, if effective, can reduce future demand for acute and crisis services and free up public funds for other priorities'; innovative service delivery through a focus on results rather than prescription; and 'an improved evidence base and availability of robust data to support the delivery of the pilot SBBs, which will inform decision making and evaluation of specific policy areas' (Queensland Treasury 2015). The target cohort is 'young people who have been in statutory care to build the key capabilities they need to both survive and thrive' (Queensland Treasury and Churches of Christ in Queensland 2017).

In 2017, Westpac Banking Corporation (Westpac) established a partnership with Social Outcomes[12] to support Churches of Christ in Queensland in raising $5 million via a Qld Treasury SBB to fund the **Youth CONNECT** program for 6.5 years (Queensland Treasury 2017, Westpac 2017). This program has been developed in partnership with the Queensland Treasury and QDHPW) 'to help young people leaving state-based care get on their feet and develop the skills and confidence to live independently'[13]. Expected outcomes include the ability to 'sustain stable housing, engage in education and achieve qualifications relevant to their goals, engage in employment and commence pathways to financial stability, and develop the personal skills they need to have the positive, strong and reliable support networks and cultural connections vital to maintaining their stability and reaching their life goals' (Queensland Treasury and Churches of Christ in Queensland 2017). Key early learnings from this pilot include: the need for trusted data; the value of partnerships; and the need for disciplined program management (Queensland Treasury 2018).

The Qld **Youth Foyers** initiative addresses a different cohort. Along with providing housing, it seeks to provide additional non-housing benefits for 16-25 year olds, who are experiencing homelessness or at risk of becoming homeless, and committed to engaging in 'education and training, as a pathway to developing the skills needed to achieve independence'.

By way of example, along with safe and secure housing, the Logan Youth Foyer (through QDHPW, Wesley Mission and Horizon Housing Company) offers: support to complete education or with employment; 'social and emotional support; long-term supported accommodation (up to 3 years); workshops and activities designed to promote personal growth and resilience; advocacy support; support for youth from marginalised backgrounds, including Aboriginal and Torres Strait Islanders and culturally and linguistically diverse (CALD) communities; and career and education support'. Skills development through the foyer includes how to manage a rental property, links with other community services, and increasing independent living skills.

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[10] https://www.treasury.qld.gov.au/growing-queensland/social-benefit-bonds-pilot-program/
[11] http://www.hpw.qld.gov.au/Housing/PartnershipInitiatives/Pages/YouthFoyers.aspx
[12] https://socialoutcomes.com.au/whats-new/
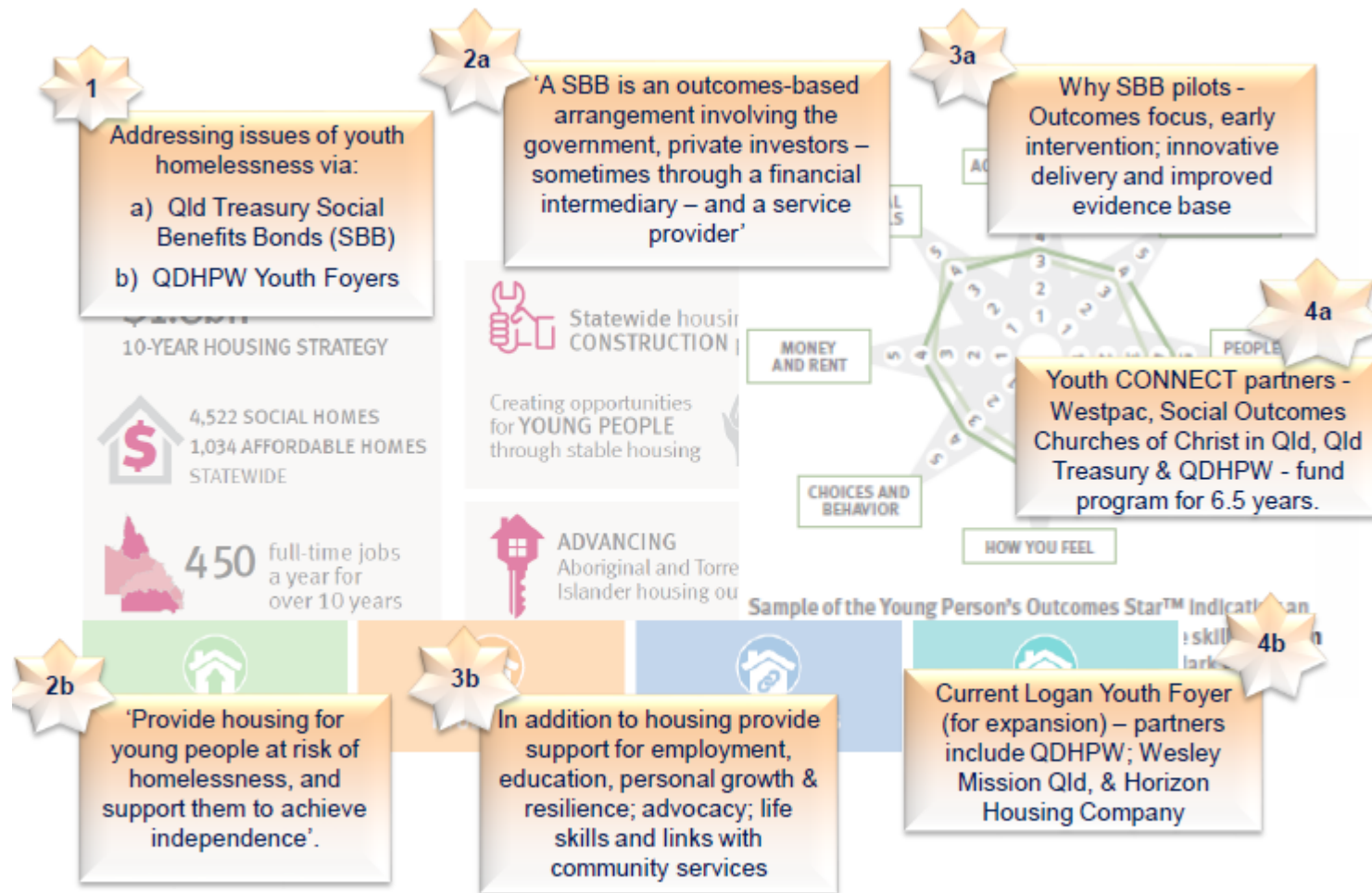[13] http://www.cofc.com.au/childrenyouthfamilies/our-services/youth-connect

For the delivery of two new foyers, a two stage tender process has been developed. The Stage 1 Expression of Interest process closed on Friday 9 June 2017. As a part of this initiative, organisations needed to demonstrate capability and capacity to deliver innovative approaches to achieve outcomes for young people. In the Stage 2 select tender process, successful proponents from Stage 1 who demonstrated 'suitable experience in construction, support services, tenancy, and property management' were invited to submit a Request for Proposal (Queensland Department of Housing and Public Works 2017). As a part of the Department's commitment in the *Queensland Housing Strategy 2017-2027*, new foyers will be built on the Gold Coast and in Townsville, with an expansion of the Logan Youth Foyer. These foyers represent a partnership between state government and the not-for-profit sector. It is expected that construction of the new foyers in Townsville and the Gold Coast will be completed in 2019/20 and the expansion of the Logan Youth Foyer completed by 30 June 2019

Figure 10 – Housing for at-risk youth – a Queensland example

1 Addressing issues of youth homelessness via:

a) Qld Treasury Social Benefits Bonds (SBB)

b) QDHPW Youth Foyers

10-YEAR HOUSING STRATEGY

4,522 SOCIAL HOMES
1,034 AFFORDABLE HOMES STATEWIDE

450 full-time jobs a year for over 10 years

Statewide housing CONSTRUCTION

Creating opportunities for YOUNG PEOPLE through stable housing

ADVANCING Aboriginal and Torres Islander housing ou...

2a 'A SBB is an outcomes-based arrangement involving the government, private investors – sometimes through a financial intermediary – and a service provider'

3a Why SBB pilots - Outcomes focus, early intervention; innovative delivery and improved evidence base

4a Youth CONNECT partners - Westpac, Social Outcomes Churches of Christ in Qld, Qld Treasury & QDHPW - fund program for 6.5 years.

MONEY AND RENT

CHOICES AND BEHAVIOR

HOW YOU FEEL

PEOPLE

Sample of the Young Person's Outcomes Star™ Indicat...

2b 'Provide housing for young people at risk of homelessness, and support them to achieve independence'.

3b In addition to housing provide support for employment, education, personal growth & resilience; advocacy; life skills and links with community services

4b Current Logan Youth Foyer (for expansion) – partners include QDHPW; Wesley Mission Qld, & Horizon Housing Company

Sources: Qld Housing Strategy 2017-2027; Churches of Christ of Qld 2017 Youth Connect Social Benefit Bond; Westpac 2017; Qld Treasury (2015). Social Benefits Bonds Pilot Program; and https://www.wmq.org.au/services/youth-and-family-support/family-and-youth-housing/logan-youth-foyer-support-service;

4.3. From Aiming Higher to One on Aberdeen – a WA case

'As at December 2010 only 4% of rentals in Perth were affordable for households on less than $35,000 per year and the public housing waitlist stood at 24,586. It would cost more than $7 billion to provide public housing just for the people already on the waitlist' (Western Australia Department of Housing 2010).

In response to this, the WA *Affordable Housing Strategy 2010–2020: Aiming Higher* strategy sought to develop **partnerships** between the public, private and NFP sectors to finance, develop, build and manage new affordable housing in that State (Figure 11). 'The Strategy is designed to influence the supply, range and diversity of affordable housing as well as the activities of the housing market, government and consumers'. It included an *inclusionary zoning* approach through a 15 per cent quota on developments on government land, and also targeted: (i) the private sector to provide finance, and to develop and invest in affordable housing projects; (ii) the 'not for profit sector to develop and manage more social and affordable housing'; (iii) 'local government to develop and boost affordable housing options in their local communities' through, for example, demonstration trails and incentives for developers; (iv) the Departments of Regional Development and Lands, Treasury and Planning, and the Office of Housing and Land Supply to collaborate in the delivery of 'key planning reforms and other complementary actions to increase the supply of affordable housing'; and (v) the human services portfolios to work to improve outcomes for individuals (Western Australia Department of Housing 2010).

The success of the strategy was evident with the target of 20,000 additional homes being reached by 2015, with a revised target of 30,000 then set for 2020. Rowley et al. (2017) also highlight the strategy's role in 'drawing together existing programs and developing the housing continuum as a way of communicating the need for affordable housing supply right across this continuum' including; 'the Keystart home loan program; leveraging new Federal Government money, including NRAS and units delivered as part of the social housing initiative'. The importance of strong political and flexible and innovative bureaucratic leadership was also noted. (Rowley, James et al. 2017)*.
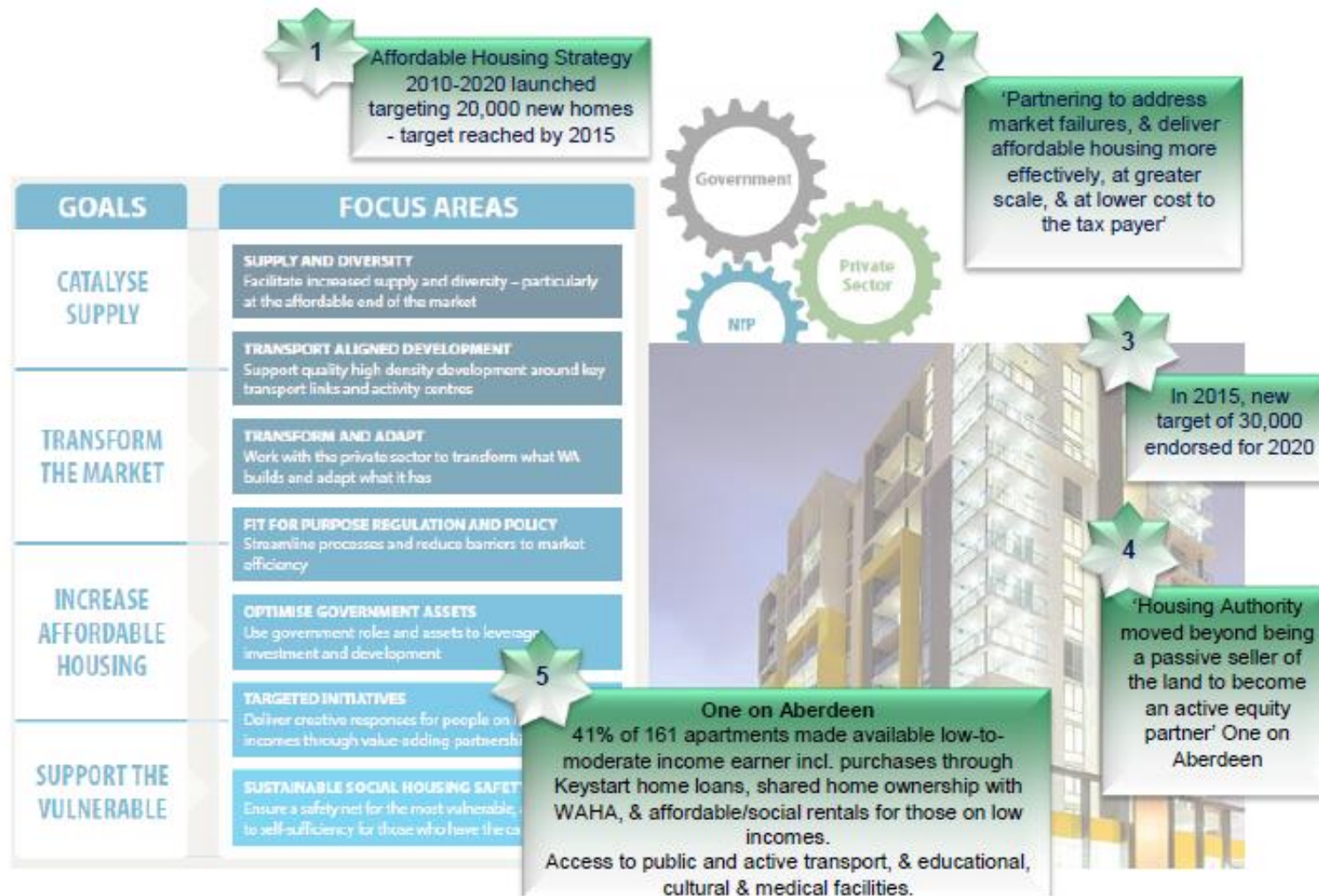
One on Aberdeen is one example of this success, and this development was recognised in 2016 by the Property Council of Australia as, 'Australia's best affordable housing development' (Western Australian Department of Communities and Housing 2016). This $73 million development is an example of the partnership approach targeted by the strategy 'to deliver the high-quality, mixed use development on what was previously idle government land', 'through innovative design and a diversity of apartment types, including initiatives to target low and moderate income renters and purchasers'. The WA government is an active equity partner in this development, with their role as a provider of housing in WA reinforced through shared ownership arrangements on this project, along with shared equity loans through Keystart, with 'forty per cent of the 161 residential apartments were specifically made available to people on low-to-moderate incomes who would otherwise face barriers to owning or renting their own home' (Western Australian Department of Communities and Housing 2016).

The recently released *Affordable Housing Action Plan 2017-18 to 2019-20* is expanding on this success through eight focus areas (WA Department of Communities 2018):

- Transform the service delivery system to deliver more people and place centred outcomes.
- Support vulnerable Western Australians - including with earlier and more coordinated support.
- More options and pathways across the continuum to help people reach their housing goals.
- Broaden sources of capital to augment government investment.
- Reform the planning and approvals system to support diverse, affordable, accessible and safe communities.

- Increase housing diversity and adaptability to meet current and future housing needs.
- Leverage METRONET precincts and government roles for social and affordable housing outcomes.
- Create new and renewed communities that are inclusive, affordable and transformative.

Figure 11 – From Aiming Higher to One on Aberdeen

Sources : WAHA 2015, http://www.housing.wa.gov.au/News/Pages/One-on-Aberdeen-named-Australias-best-affordable-housing-development.aspx & http://www.citylifeprojects.net/resources/one%20on%20Aberdeen%20brochure.pdf

5. Developing the criteria

The 19 proposed criteria for considering social procurement approaches are listed below (Table 2). It is proposed that these can help decision-makers when considering both policy and delivery options for procuring social and affordable housing, and wrap-around services (and potentially be used for assessment of outcomes). These criteria should be considered as a checklist to help align the social procurement approach with desired benefits, to help optimise the investment risk equation.

Table 2 – Social procurement criteria

System focus	Builds partnerships
	Builds housing pathways
	Builds diversity in housing stock
	Builds financial capacity of system
Supply chain focus	Stimulates industry-wide innovation
	Supply chain maturity
	Builds sector capacity
	Successful models/pilots
Organisational focus	Benefits/outcomes measurement (life trajectory and financial)
	Time frame for benefits realisation
	Integrated service and asset delivery
	Manages risk distribution
Person focus	Addresses diverse cohort needs
	Addresses diversity, choice and aspirations in housing needs
	Builds financial capacity of individuals
	Supports sustainable and affordable living outcomes
Flexibility	Agility and responsiveness
	Appropriate scalability
	Location-specific responsiveness

The *social procurement approaches* identified include:

- Planning mechanisms, including inclusionary zoning and value capture
- Public housing transfers and renewal
- Housing for remote Indigenous communities
- Housing for those with a disability
- Partnerships and joint ventures including city deals
- Community Housing Provider models including private rental agencies and rent to buy
- Shared equity/ownership models; cooperatives
- Social impact/benefit bonds
- Build to rent
- Using vacant infrastructure (e.g. pop-up shelters)
- Common Ground model

Ensuring that the *nine domains* illustrated below and identified in the SBEnrc *Rethinking Social Housing* research[14] (or in NSW, the seven Human Services Outcomes Framework domains) are addressed is also critical when assessing policy and delivery solutions.

Table 3 provides the detail of the testing which was done in developing the social procurement criteria, against each of the test cases.

Table 3 – Testing the 19 draft social procurement criteria against the case studies

System focus			
Draft Criteria	**NSW**	**Qld**	**WA**
Builds partnerships	Outcomes Framework provides tangible KPIs on which to build partnership (1); Landcom Affordability and Diversity Policy (3) -Ivanhoe Redevelopment (2)	Intrinsic to SBB (4), (5) & Youth Foyer concepts (6).	Intrinsic to strategy
Builds housing pathways	Embedded in housing journey approach (1) See future outcomes from Ivanhoe Redevelopment.	Especially re Youth Foyers (7).	Intrinsic to Keystart Home Loans shared equity approach (12). See future outcomes - One on Aberdeen.
Builds diversity in housing stock	Landcom Affordability and Diversity Policy (3) Inherent in Ivanhoe project	Youth Foyers (7).	Diversity through differing partnerships.
Builds fin. capacity of system	Ivanhoe Redevelopment (2); Landcom Affordability and Diversity Policy (3)	SBB addresses both financial outcomes and life impact.	Government backing in Aiming Higher strategy Keystart Home Loans (12).
Supply chain focus			
Draft Criteria	**NSW**	**Qld**	**WA**
Stimulates industry-wide innovation	Landcom Affordability and Diversity Policy (3)	Youth CONNECT SBB & Youth Foyers.	One on Aberdeen (11).
Supply chain maturity		Pilot phase for SBB. Expansion phase for Youth Foyers.	Keystart established in 1989.
Builds sector capacity	Dissemination through supply chain enable by comprehensive approach (1,2 & 3)	Both SBB and Youth Foyers enabling capacity building.	Intrinsic to Affordable Housing Strategy.
Successful models/pilots	Ivanhoe – success to be determined	SBB – success to be evaluated. Youth Foyers – expansion to Logan demonstrating success.	Aiming Higher – success demonstrated.

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[14] http://www.sbenrc.com.au/research-programs/1-31-rethinking-social-housing-effective-efficient-equitable-e3/

Organisational focus			
Draft Criteria	**NSW**	**Qld**	**WA**
Benefits / outcomes measure-ment	Across all approaches Human Services Outcomes Framework (1); Ivanhoe Redevelopment (2); Social Housing Outcomes Plan (3)	Defined as part of Youth CONNECT SBB (4), (5).	Affordable Housing Strategy 2010-2020 – Opening Doors (8) & Aiming Higher (9), (10).
Time frame for benefits realisation	FACS Housing journey impact (1)	Defined as part of Youth CONNECT SBB (4), (5).	As above.
Integrated service and asset delivery	Embedded in housing journey approach (1); Ivanhoe Redevelopment (2)	Intrinsic to SBB (4), (5) & Youth Foyer concepts (6).	One on Aberdeen (11).
Manages risk distribution	Specification of outcomes (1&2)	SBB addresses these (5) pp. 27-29.	Government backing.
Person focus			
Addresses diverse cohort needs	Person-centred approach (1): Ivanhoe Redevelopment (2); Social Housing Outcomes Plan (3)	Intrinsic to SBB & Youth Foyer concepts (7)	
Addresses diversity, choice and aspirations in housing needs	Landcom Affordability and Diversity Policy (3)	Intrinsic to SBB & Youth Foyer concepts (7).	Intrinsic to Affordable Housing Strategy.
Builds financial capacity of individual	FACS Housing Journey (1)	Intrinsic to SBB & Youth Foyer concepts (7).	Shared equity approach (11).
Flexibility focus			
Agility and responsive-ness		Youth Foyers (6), (7).	Aiming Higher strategy enabled number of partnership arrangements.
Appropriate scalability	Outcomes Framework designed as department-wide framework (1)	Current SBB pilot at 300 people.	Intrinsic to Affordable Housing Strategy.
Location-specific responsive-ness	Landcom Affordability and Diversity Policy (3); Ivanhoe Redevelopment (2)	Especially re Youth Foyers (7).	One on Aberdeen (11).
Supports sustainable & afford. living outcomes	Landcom Affordability and Diversity Policy (3); Ivanhoe Redevelopment env. & energy targets (2)	Intrinsic to SBB (4), (5) & Youth Foyer concepts (6), (7).	See Freo Alternative for emerging solution (13).

References – 1. (Chilvers 2017); 2. (Curran 2017); 3. (Chappell 2017); 4. (Qld Treasury 2015); 5. (Churches of Christ in Qld 2017); (6) (QDHPW 2017b); (7) (Wesley Mission 2016); (8) (Gov. of WA Housing Authority 2010); (9) (Gov. of WA Housing Authority 2015a); (10) (Gov. of WA Housing Authority 2015b); (11) (WA Dept of Communities and Housing 2016); (12) (Keystart Home Loans 2017); (13) (City of Freemantle 2018)

Three additional issues to expand thinking around these criteria are considered in the following table (Table 4).

- Is additional work required to demonstrate effective outcomes?
- Are more evidence-based outcomes and measures required?
- Successful models or pilots.

Table 4 – Further testing the social procurement criteria

Systems focus	
Builds partnerships	Successful models or pilots – - Many examples available. Inherent in the WA Affordable Housing Strategy, NSW Ivanhoe Redevelopment, the Qld SBB and Youth Foyers projects
Builds housing pathways	Successful models or pilots – - Brisbane Common Ground – see evaluation report (Parsell, Petersen et al. 2015) & NSW Common Ground[15]
Builds diversity in housing stock	Is additional work required to demonstrate effective outcomes? - Houses and low rise units predominate but low rise units, mixed-use medium density units, townhouses, high-rise apartments and studio apartments are the five popular choices to consider to improve access to public housing (360 Degree Survey). Successful models and pilots – - NSW Ivanhoe and Waterloo developments worthy of tracking as they develop, & WA Affordable Housing Strategy outcomes – see Rowley et al. 2017.
Builds financial capacity of system	Is additional work required to demonstrate effective outcomes? - The 2017-18 Commonwealth Budget - (i) National Housing Finance and Investment Corporation (NHFIC), and $1 billion National Housing Infrastructure Facility (NHIF) to tailor financing to partner with local governments in funding infrastructure to increase supply; and (ii) an affordable housing bond aggregator - drive efficiencies and cost savings in the provision of affordable housing by CHPs. These initiatives have the potential to build the financial capacity of the system but will need to be monitored and evaluated for effective outcomes. - 360 Degree Survey found social support, budget reductions, lagging maintenance, inflationary housing prices, and general economic conditions are the top 5 high risks when procuring public housing. Are more evidence based outcomes and measures required? - NSW Ivanhoe and Waterloo developments worthy of tracking as they develop. Successful models and pilots – - WA Affordable Housing Strategy outcomes – see Rowley et al. 2017.
Supply chain focus	
Stimulates industry-wide innovation	Is additional work required to demonstrate effective outcomes? - WA Aiming Higher, NSW Estate Transfers and Qld SBB. Are more evidence based outcomes and measures required? - In the 360 Degree Survey, collecting and having access to timely data and a timescale for outcomes (often medium to long term) are identified as the two most extremely difficult to measure. Successful models or pilots. - WA Aiming Higher, NSW Estate Transfers and Qld SBB.

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[15] https://www.facs.nsw.gov.au/about/media/releases/archive/innovative_housing_project_opens; https://www.missionaustralia.com.au/housing/who-we-are/stakeholders/what-we-do-sub; http://wahousinghub.org.au/display/RES/2015/01/23/Camperdown+Common+Ground+Project%2C+Sydney

Supply chain maturity	Is additional work required to demonstrate effective outcomes?
	- *Housing for those with a disability via NDIS* - low level of maturity generally. *Build to rent* - low level of maturity generally. *360 Degree Survey* – value capture, inclusionary zoning, innovative funding, co-ops and mutuals, Common Ground and housing for remote Indigenous communities all reported the lowest level of experience and expertise generally across respondents.
	Are more evidence based outcomes and measures required?
	- *Housing for remote Indigenous communities* – needs development. *Build to rent* - low level of maturity generally.
	Successful models or pilots.
	- *Planning mechanisms* - med-high generally though low for value capture and other innovative approaches. *Common Ground* - high in Qld, SA and NSW.
Builds sector capacity	Is additional work required to demonstrate effective outcomes?
	- Need to build evaluations into delivery budgets.
	- 360 Degree Survey found innovative funding schemes, planning mechanisms including value capture and inclusionary zoning, partnerships, CHPs and estate renewal are selected as the top 5 approaches to be considered in improving access to public housing.
	Are more evidence based outcomes and measures required?
	- Evaluation of City Deals?
	Successful models and pilots.
	- NSW Human Services Outcome Framework and WA Aiming Higher.
Successful models/pilots	Successful models and pilots.
	- Database of successful projects where evidence is available would be beneficial to all.

Organisational focus	
Benefits / outcomes measurement	Is additional work required to demonstrate effective outcomes?
	- *Using vacant infrastructure* – short term benefits to be mapped – potential for being part of a longer term housing and life trajectory solution. *Private rental agencies and rent to buy* – frameworks being currently developed in several states.
	Are more evidence based outcomes and measures required?
	- Housing for remote Indigenous communities and for those with a disability. Social impact/benefit bonds - more evidence based outcomes and measures required – see Qld Treasury pilots and projects.
	Successful models and pilots.
	- *Partnerships* – WA Affordable Housing Strategy outcomes – see Rowley et al. Common Ground model – evidence-based data available from Brisbane Common Ground (Parsell, Petersen et al., 2015). *Public housing transfers and renewal* – Ivanhoe Redevelopment– post development assessment could provide valuable evidence.
Time frame for benefits realisation	Longitudinal studies required with appropriate resources, funding and data.
Integrated service and asset delivery	Is additional work required to demonstrate effective outcomes?
	- *Planning mechanisms* - can facilitate; can value capture from transport projects to fund additional service provisions be used for social affordable housing? *Housing for remote Indigenous communities* - social and physical infrastructure faces difficulties due to location. *Housing for those with a disability* - more integrated and flexible approach required. *Cooperatives* - typically asset only though other services, could be integrated depending on nature of cooperative.
	Successful models and pilots.
	- *Community Housing Providers* (incl. private rental brokerage schemes) - can provide integrated assets and social services, and can target physical assets in locations with

	strong education, employment and transport infrastructure. *Common Ground* - integral with this approach – see Common Ground Brisbane (Parsell, Petersen et al., 2015).
Manages risk distribution	Is additional work required to demonstrate effective outcomes? - *Planning mechanisms*; community risk; developer risk; political risk; inclusionary zoning - time frame for mandatory % in new developments required to address this. *Public housing transfers and renewal* - impacts on government agency budgets and employment levels. Title transfers can enable increased innovation[16]- individual risk; community risk; developer risk; political risk *Housing for remote Indigenous communities* - individual risk; community risk; developer risk; political risk. *Housing for those with a disability* - individual risk; community risk; developer risk; political risk; regulatory risk. *Social impact / benefit bonds* – early stages of development - lack of effective outcomes identification and measurement potential risk. Procurement risk; contractor risk. Are more evidence based outcomes and measures required? - *Partnerships and joint ventures* - Existing alliancing and partnering procurement arrangements can facilitate. Risk sharing identified as part of contract negotiations. City Deals - need to be made explicit at inception. *Community Housing Providers* - provider risk. Clarification of social outcomes required via government procurement contracts is important. Outcomes frameworks in development in several states will support this, e.g., NSW Human Services Outcomes Framework. Successful models and pilots. - *Shared equity and ownership* - Clarity of ownership required for investment $s. Individual risk; equity partner risk; investor risk
Person focus	
Addresses diverse cohort needs	Is additional work required to demonstrate effective outcomes? - 360 Degree Survey – majority of respondents who sent demographics are tracked, but outcomes difficult to use. Are more evidence based outcomes and measures required? - Qld Social Benefits Bonds – outcomes to be followed. Successful models and pilots. - NSW Human Services Outcome Framework feeding into Ivanhoe and Waterloo developments. Qld Youth Foyers.
Addresses diversity, choice and aspirations in housing needs	Is additional work required to demonstrate effective outcomes? - 360 Degree Survey - strong agreement across all respondents for the need for community integration as a part of the housing solution. Successful models and pilots. - NSW Ivanhoe and Waterloo developments worthy of tracking as they develop. WA Affordable Housing Strategy outcomes – see Rowley et al. 2017.
Builds financial capacity of individual	Successful models and pilots. - Qld Youth Foyers - Common Ground model
Supports sustainable & affordable living outcomes	Is additional work required to demonstrate effective outcomes? - NSW Ivanhoe Redevelopment, Qld Youth Foyers, WA Freo Alternative outcomes - 360 Degree Survey found low rise units, mixed-use medium density units, townhouses, high-rise apartments and studio apartments are the five popular choices to consider in improving access to public housing.
Flexibility focus	

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[16] NSW undertakes the biggest volume of public housing transfers at present. These do not involve title transfers (assets and tenants only). Waterloo will be an internationally significant transfer.

Agility and responsive-ness	Is additional work required to demonstrate effective outcomes? - *Planning mechanisms* - address lengthy approval processes; establish time frame for mandatory inclusionary zoning in new developments required. *Public housing transfers and renewal* – lengthy process. *Social impact / benefit bonds* - still in pilot stage. *Build to rent* –an emerging model. Are more evidence based outcomes and measures required? - *Housing for remote Indigenous communities* - long term issues not effectively addressed. *Housing for those with a disability* - still being developed through NDIA. Successful models and pilots. - WA Affordable Housing Strategy implemented in a climate of strong political leadership and flexible and innovative bureaucratic leadership. - Can pop-up shelters and tiny houses provide short to medium term solutions?
Appropriate scalability	Are more evidence based outcomes and measures required? - *Planning mechanisms* - value capture – potentially applicable for large scale development, examples required, see (Rosen, Lake-Brown et al., 2017). *Housing for remote Indigenous communities* - cultural and locational variables require targeted solutions. *Housing for those with a disability* - accessibility and locational variables require targeted solutions.
Location-specific Responsive-ness	Is additional work required to demonstrate effective outcomes? - Regional variations within states and territories an issue. New responsive models required for housing for *remote Indigenous communities and for those with a disability*. Are more evidence based outcomes and measures required? - *Partnerships and joint ventures* – a more functional market has the potential to better address housing and services for those in crisis. *City Deals* - social and affordable housing needs to be an explicit goal. *Using vacant infrastructure* – can this be integrated into emergency and transitional housing responses? Successful models and pilots. - Use *planning mechanisms* to produce more integrated solutions to improve life outcomes: The Freo Alternative, Freemantle, WA (City of Freemantle, 2018). The Brisbane City Pan (2014) enable small-lot housing to cater for increasing proportion of older residents, single and couple households. *Public housing transfers and renewal* - change power equation between tenant and owner/manager; changing circumstance does not mean change in home; co-location of jobs, education, social services and networks, and housing can improve life outcomes. *Community Housing Providers* - Strong position to make changes through direct relationships with tenants. *Shared equity and ownership* - Strong position to address this through access to long term access to stable housing. *Common Ground* - rich narratives (tenants' stories) demonstrating effectiveness.

6. Concluding remarks

It is not anticipated that all criteria will be relevant to applications, as there will be various unique considerations. It is however anticipated that each criteria can be considered as a part of early decision-making, and then set aside for further investigation. Those which make a shortlist will depend on various issues such as: asset and/or service being procured; who is procuring (e.g. government agency or CHP); and the location of the service and/or asset (this will vary with State, city, regional or remote area).

The criteria are intended to assist policy makers or those delivering outcomes to better leverage potentially latent opportunities on the basis of good policy, and to improve organisational agility through providing a readily available checklist to prompt and promote diverse thinking.

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