



DISTRICT COUNCIL OF LOXTON WAIKERIE

Loxton Retirement Village –Refurbishment Policy

Policy Identification:	Loxton Retirement Village
Policy type:	Finance
Summary:	The policy provides direction for the refurbishment process of units within the Retirement Village.
Record number:	
Date of adoption or approval:	18 September 2009
Last date of review:	18 January 2018
Next date of review:	Once in each term of council (every 4 years)
Authorisation:	Council
Responsible department:	Executive
Responsible officer (s):	Chief Executive Officer
Review officer (s):	Manager Regulatory Services, Loxton Retirement Village – Administration Officer
Consultation required:	
Relevant references:	
Delegations:	
Legislation:	Retirement Villages Act
Related policies:	
Related procedures:	Solar PV Panel Guidelines

1. Purpose:

To ensure that the long term provision and integrity of The Loxton Retirement Village Complex (the Village) through the provision of a sustainable Refurbishment Reserve required to meet the refurbishment needs of the independent living units of the Village

To ensure that the independent living units are routinely assessed for refurbishment

2. Strategic reference

Community leadership; strategy 2.1.1: undertake decision making that is transparent, timely and responsive to community needs, whilst maintaining a clear focus on the long term goals of the community.

Provision and maintenance of infrastructure, assets and facilities; strategy 3.3.2; examine opportunities to develop, maintain or rationalise Council owned assets and facilities based primarily on strategic objectives, assessment of risk (if any), usage, spread of potential benefit and community well being.

Strengthen our Community through the provision of Cultural, Recreational and Community Services strategy 5.3.3 – facilitate community needs in areas such as aged services and

accommodation, childcare and preschool support, public transport, access to services and health care

3. Principles:

Council acknowledges and accepts its responsibility to ensure for the long term provision and integrity of The Village In order to discharge this responsibility regular assessment and refurbishment of the units is necessary and required

Industry standards suggest that minor refurbishment is required every 10 to 15 years and typically will focus on the state of painted areas, floor coverings, kitchen cupboards, bench tops, stoves, bathroom fixtures, hot water services and air conditioning.

Cyclic refurbishment of units will be informed by the Quantity Surveyors Report and will be a planned and proactive process.

Refurbishment will be funded from the Refurbishment Reserve.

Nothing in this policy precludes an earlier refurbishment where due to fair wear and tear such refurbishment is deemed to be required.

In order to ensure sufficient provision is made to meet cyclic refurbishment 5% of the premium paid by incoming residents, based on valuation by a licenced valuer, is paid into the refurbishment fund.

As per the terms of the Residents Contract an amount equivalent to 15% of the Maintenance Fee paid by residents is paid into the Refurbishment Fund.

The adequacy of the Refurbishment Reserve and the assumptions of the modelling underpinning the reserve provision will be independently reviewed at least once in every 4 year term of Council.

4. Variations in refurbishment

Where there is a request made by a resident for a variation during the refurbishment of a unit approval must be gained from Council (or an appointed project manager) prior to any work commencing. This is intended to ensure that there are clearly defined procedures to manage any variations that have been requested by the resident. The cost of such variations are directed to and recovered from the resident.

As per the residents contract residents or the estate of the resident may be required to remove any such variation at the request of Council.

5. Delegations

The Loxton Retirement Village Administration Officer has delegated authority from the Chief Executive Officer to consider any requests for modification to units within the Loxton Retirement Village. The Officer is able to approve a request aligned with Council policy and supported by an occupational therapist or other professional recommendation and where the request relates to a mobility issue.

The Officer has delegated authority from the Chief Executive Officer to approve requests from residents of the Loxton Retirement Village to install solar panels on their unit providing that the request complies with the Loxton Retirement Village Solar PV Panel Guidelines (as attached to this policy) in all regards. A signed acceptance of the conditions noted within the guidelines must be provided prior to any approval granted.

5. Availability of the policy

This Policy will be available for inspection at the Council Offices at Loxton or Waikerie during ordinary business hours at no charge.

Copies of this Policy will also be available from Councils website www.loxtonwaikerie.sa.gov.au or postal copies may be obtained from the Council Office free of charge.

5. Document history and version control

Date	Version	Authorisation: Council/ Committee/ Senior Management Meeting	Amendment details
18/09/2009	1.0	Council meeting of 18 September 2009	First Version – Policy was titled Loxton Retirement Village – Refurbishment Cyclic Maintenance Policy
17/06/2011	1.0	Council meeting of 17 June 2011	No change noted
19/09/2014	2.0	Council meeting of 19 September 2014	Amendments noted: Title change to Loxton Retirement Village – Refurbishment Policy Clarification of the process of refurbishment ie that inspection will determine if refurbishment is undertaken rather than pre- determined period of time Explanation of the refurbishment reserve fund
17/11/2017	3.0	Council meeting of 17 November 2017	Amendments noted: Noting that refurbishment is led by the report of the Quantity Surveyor and is a planned and proactive process rather than a unit by unit approach. Clarification provided that 5% of the premium paid by the incoming resident is paid into the refurbishment fund. Extension of the review period to that of once in each term of council (4 years) and the addition of the document history and version control protocols Addition of the notation in regard to resident requested variations in refurbishment.
18/01/2018	4.0	Chief Executive Officer (noting delegation)	Amendment noted: record of delegation authorised by the Chief Executive Officer to the Loxton Retirement Village Administration Officer to approve requests for modification to units, as

			advised by an occupational therapist or other professional and for the installation of solar PV panels that are compliant with the DCLW Solar PV Panel Guidelines
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SOLAR PV PANEL GUIDELINES

As with all modifications to the unit, residents are requested to submit a Unit Modification form.

Approval will be subject to the following:

1. The size of the installation is not limited to the kWp produced but is limited by the number of panels that can be installed.
2. 2 rows of panels with no limitation on the number so long as all panels are the same way and that all roof installations/rails be affixed to the upflute of the roofing iron.
3. All requests for systems are to be accompanied by a panel layout in the recommended criteria supplied by your contractor.
4. The southern unit of an east/west facing duo will have to be examined separately and agreed to by the Committee. Please make your Contractor aware of these requirements.
5. Approval is on the understanding that maintenance costs are **not** the responsibility of the Loxton Retirement Village.
6. That Loxton Retirement Village accept that as the system is attached to our property it adds no additional risk/cost to our overall insurance.
7. There is no value-adding on revaluation on change over.
8. If the incoming resident accepts the unit as installed, then negotiation for purchase is between the two parties (outgoing v incoming).
9. If the incoming resident accepts the installation, they also accept all maintenance costs which may be incurred.
10. If the incoming resident does not accept the system, then such system shall be removed by the outgoing residents/agents and all electrical, building and roofing restoration be at the outgoing residents expense.