

## HEATHERLIE HOMES (Henna Street)

### Factsheet for mixed tenure retirement village

Under the *Retirement Villages Act 1986*, all retirement villages operating in Victoria must give this factsheet to a retiree (or anyone acting on their behalf) within seven days of a request, and include it in any marketing material provided to them and intended to promote a particular village.

Make sure you read and understand each section of this document before you sign a contract to live in this village.

Consumer Affairs Victoria suggests that before you decide whether to live in a retirement village, you should:

- seek independent advice about the retirement village contract – there are different types of contracts, and they can be complex
- find out the financial commitments involved – in particular, you should understand and consider entry costs, ongoing charges and financial liabilities on permanent departure (covered in sections 9 and 10 of this document)
- consider what questions to ask the village manager before signing a contract
- consider whether retirement village living provides the lifestyle that is right for you
- review the *Guide to choosing and living in a retirement village*.

**The Guide and other general information about retirement living is available on Consumer Affairs Victoria's website at:**  
[www.consumer.vic.gov.au/housing/retirement-villages](http://www.consumer.vic.gov.au/housing/retirement-villages).

**All amounts in this factsheet are GST-inclusive, unless stated otherwise where that is permitted by law. (As Heatherlie is a not-for-profit organisation, no GST is applicable)**

# 1. Location

Name and address of retirement village:	Christ Church Close 66 Henna Street WARRNAMBOOL VIC 3280
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# 2. Ownership

2.1	Name and address of the owner of the land on which the retirement village facilities are located (company /organisation/owners corporation):	The Ballarat Diocesan Trustees 49 Lydiard Street Ballarat VIC 3350
2.2	Year construction started:	1988

# 3. Management

3.1	<ul style="list-style-type: none"><li>Name of company or organisation that manages the retirement village:</li><li>ABN:</li><li>Address:</li><li>Telephone number:</li><li>Date company or organisation became manager:</li></ul>	Heatherlie Homes, an unincorporated agency of The Uniting Church in Australia Synod of Victoria and Tasmania  29 263 185 760  103-111 Koroit Street Warrnambool VIC 3280  (03) 5561 5565  1979
3.2	<p>Is there an onsite representative of the manager available for residents?</p> <p>An onsite representative at 103-111 Koroit Street, Warrnambool is available on these days:</p>	<p><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>Office located at 103-111 Koroit Street, Warrnambool VIC 3280</p> <ul style="list-style-type: none"><li>Monday from 9am to 5pm</li><li>Tuesday from 9am to 5pm</li><li>Wednesday from 9am to 5pm</li><li>Thursday from 9am to 5pm</li><li>Friday from 9am to 5pm</li></ul>

## 4. Nature of ownership or tenure

Resident ownership or tenure of the units in the village is:

- Lease (non-owner resident)

## 5. Number and size of residential options

5.1 Number of units by accommodation type:

- 11 one-bedroom units

5.2 Garages, carports or car parks:

- ☐ ~~Each unit has its own garage or carport~~  
☐ ~~attached to the unit~~  
☐ ~~separate from the unit.~~

- ☐ ~~Each unit has its own car park space~~  
☐ ~~adjacent to the unit~~  
☐ ~~separate from the unit.~~

- ☐ ~~General car parking is available in the village for residents and visitors.~~

- ☒ Other (*specify*) – Subject to payment of a Garage Bond of \$15,000, availability and prior arrangement with the Manager, a limited number of garage spaces are available for resident parking.

**Note:** The licence fee is refundable once the garage space is no longer required by the resident.

- ☐ ~~No garages, carports or car parking are provided.~~

## 6. Planning and development

Has planning permission been granted for further development of the village?

- ☐ Yes ☒ No

## 7. Facilities onsite at the village

7.1 The following facilities are available to residents as at the date of this statement.

**Note:** If the cost for any facility is not funded from the recurrent service charge paid by residents or there are any restrictions on access, a list is attached with the details.

- Outdoor areas
- Communal laundries
- Other (*specify*) – Separate resident's lounge

7.2 Does the village have an onsite or attached residential or aged care facility? ☐ Yes ☒ No

**Note:** The retirement village owner or manager cannot keep places free for residents. To enter a residential or aged care facility, you must be assessed as eligible through an aged care assessment in accordance with the *Commonwealth Aged Care Act 1997*.

## 8. Services

8.1 Services provided to all village residents (funded from the recurrent service charge paid by residents):

- Cleaning and maintenance of communal areas and facilities;
- Payment of council rates and charges for all areas;
- Payment of gas, electricity, water and other utilities for all areas;
- Building reinstatement insurance;
- Public Liability insurance in all areas;
- Employee Insurance;
- Gardening, lawn mowing and landscaping of the communal areas;
- Garbage and Waste collection from the village;
- Cleaning and lighting of communal areas;
- Maintenance and repair of all areas unless caused by residents;
- Management and administration services

8.2 Are optional services provided or made available to residents on a user-pays basis?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
	Description	Cost
	Respite Accommodation – located at 103-111 Koroit Street Warrnambool	Subject to availability, \$70 per night
	Housekeeping/cleaning services	\$25 per hour

## 9. Entry costs and departure entitlement

9.1 The resident must pay:	<ul style="list-style-type: none"> <li>a <b>refundable</b> in-going contribution</li> </ul>
9.2 If the resident must pay a <b>refundable</b> In-going contribution:	
<ul style="list-style-type: none"> <li>the amount for a non-air- conditioned unit is:</li> </ul>	\$140,000 for a 1 bedroom unit (Includes \$105,000 Ingoings, a \$30,000 Interest Free Loan and a \$5,000 damages bond)
<ul style="list-style-type: none"> <li>the amount for an-air-conditioned unit is:</li> </ul>	\$145,000 for a 1 bedroom air-conditioned unit (includes \$110,000 Ingoings, a \$30,000 Interest Free loan and a \$5,000 damages bond).
<ul style="list-style-type: none"> <li>When is it refunded?</li> </ul>	<ul style="list-style-type: none"> <li>other (<i>At the termination of the occupancy</i>):               <ul style="list-style-type: none"> <li>The earliest of:                   <ul style="list-style-type: none"> <li>14 days of receipt of the next in-going contribution.</li> <li>14 days of the next resident taking possession of the unit; and</li> <li>6 months of permanent departure.</li> </ul> </li> </ul> </li> </ul>

<p>•</p>	
<p>9.3 If the resident must pay a <b>refundable</b> in-going contribution, is a fee deducted at permanent departure?</p> <p>If yes, the departure fee is based on:</p>	<p><input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p> <ul style="list-style-type: none"> <li>• other basis (<i>specify</i>):</li> </ul> <p>From the date your occupancy begins a pro rata daily drawdown amount will be deducted from your Ingoing amount. (Drawing down for a maximum of 6 years). At the following 2024 rates:</p> <p><u>For a 1 bedroom non airconditioned unit:</u></p> <ul style="list-style-type: none"> <li>• <b>\$47.94 per day</b></li> </ul> <p><u>For a 1-bedroom air-conditioned unit:</u></p> <ul style="list-style-type: none"> <li>• <b>\$50.22 per day.</b></li> </ul>
<p>9.5 These costs must be paid by the resident on permanent departure, or are deducted from the refundable in-going contribution:</p>	<ul style="list-style-type: none"> <li>• Other costs (<i>specify</i>) <ul style="list-style-type: none"> <li>○ costs to repair any damage to the unit caused or contributed to by you other than fair wear and tear; and</li> <li>○ any Maintenance Charges and other moneys owed by you under your contract or otherwise and any GST the Owner or Manager is liable to pay on these moneys.</li> </ul> </li> </ul>
<p>9.6 The estimated sale price ranges for all classes of units in the village</p>	<ul style="list-style-type: none"> <li>• Not applicable</li> </ul>

## 10. Ongoing charges

10.1 The current rates of ongoing charges for new residents:

Type of unit	Service charge	Long term maintenance fund charge
Self-contained unit:	<ul style="list-style-type: none"><li>• <b>\$910.00</b> per calendar month (single person in non airconditioned 1 bedroom unit)</li><li>• <b>\$936.00</b> per calendar month (single person in an airconditioned 1 bedroom unit)</li><li>• <b>\$985.00</b> per calendar month (couple in 1 bedroom non airconditioned unit)</li><li>• <b>\$1011.00</b> per calendar month (couple in an airconditioned 1 bedroom unit)</li></ul> <p><b>Note: the above amounts are reviewed annually subject to the Retirement Villages Act</b></p>	

## 11. Financial management of the village

11.1	• The village operating surplus or deficit for the last financial year is:	\$100,384 surplus – 2023 year ( <i>AGM is held in April 2024 for 2023 year</i> )
11.2	Does the village have a long-term maintenance fund?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No

## 12. Capital gains or losses

If the unit is sold, does the resident share in any capital gain or loss?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
The village is not strata titled	

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## 13. Reinstatement or renovation of the unit

Is the resident responsible for reinstatement or renovation of the unit on permanent departure?

☒ Yes ☐ No

If yes, the resident must pay for:

Costs to repair damage or in order to bring the unit to the standard required in the residence and management contract (fair, wear and tear excepted).

## 14. Insurance

14.1 Is the village owner or manager responsible for arranging any insurance cover for the village?

☒ Yes ☐ No

If yes, the village owner or manager is responsible for these insurance policies:

- Public Liability Insurance
- Building Reinstatement Insurance
- Employee Insurance
- Professional Indemnity Cover

14.2 Is the resident responsible for arranging any insurance cover?

☒ Yes ☐ No

If yes, the resident is responsible for these insurance policies:

Household contents insurance - recommended

## 15. Security

Does the village have a security system?

☒ Yes ☐ No

If yes:

• the security system details are:

7 security cameras

• the security system is monitored between:

Recording 24 hours a day 7 days per week



## 16. Emergency system

Does the village have an emergency help system? ☐ Yes ☒ No

## 17. Resident restrictions

17.1 Are residents allowed to keep pets? ☐ Yes ☒ No

17.2 Are there restrictions on **residents'** car parking in the village? ☒ Yes ☐ No

17.3 Are there any restrictions on **visitors'** car parking in the village? ☒ Yes ☐ No

## 18. Accreditation

Is the village accredited:

- under the Lifemark Village Scheme (administered by The British Standards Institution and initiated by the Property Council of Australia)? ☐ Yes ☒ No
- by the Australian Retirement Village Association? ☐ Yes ☒ No
- under the International Retirement Community Accreditation Scheme (administered by Quality Innovation Performance and initiated by Leading Age Services Australia)? ☐ Yes ☒ No

## 19. Resident input

Does the village have a residents committee established under the *Retirement Villages Act 1986*? ☒ Yes ☐ No

## 20. Waiting list

Does the village have a waiting list for entry?

☒ Yes ☐ No

If yes:

- No fee

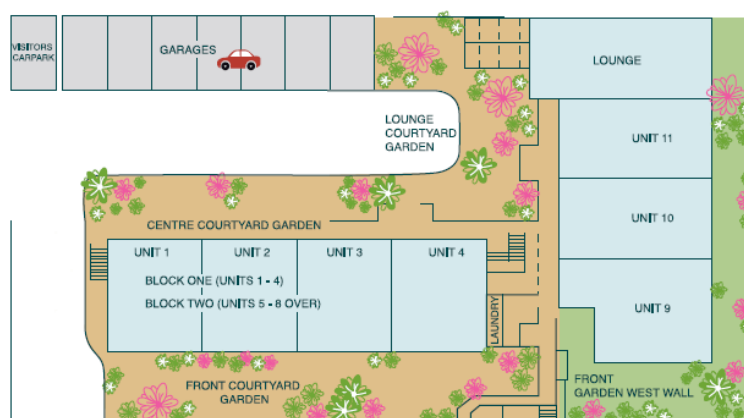
- what is the fee to join the waiting list?

**The following documents are in the possession or control of the owner or manager and can be inspected free of charge within seven days of a request (by law).**

- ☒ Village site plan
- ☐ ~~Plans of any units under construction~~
- ☒ The statutory statements and report presented to the previous annual meeting of the retirement village
- ☐ ~~Statements of the balance of any capital works, capital replacement or maintenance fund at the end of the previous three financial years of the retirement village~~
- ☒ Examples of contracts that residents may have to enter into
- ☐ ~~Planning permission for any further development of the village~~
- ☒ Village dispute resolution documents

**Declaration: The information in this factsheet is correct as at 19<sup>th</sup> March 2024.**

### CHRIST CHURCH CLOSE



### 66 HENNA STREET