

The Association of Residents of Queensland Retirement Villages is the voice of residents in the Queensland retirement village industry.

ANNUAL REPORT

2018 — 2019

ARQRV is the Association of Residents of Queensland Retirement Villages. We work to ensure your voice is heard and your rights protected as a resident, whether you are a pensioner or an independent retiree.



*The voice of residents in
Queensland Retirement
Villages*

2019 ANNUAL GENERAL MEETING AGENDA

- 09:30** Opening and Welcome
1. Attendance and Apologies
 2. Minutes of the previous meeting—as circulated
 3. Business arising from minutes
 4. Reports:
 - President
 - Treasurer
 - Mediation and Advocacy
 5. Special resolution motion—as circulated
 6. General business
 7. Election of incoming committee
 8. Special Guest Speakers:
 - Kim Teudt—Chair of the Qld Retirement Living Council
 9. Facebook campaign and videos
- 12:00** Closure of meeting
- 12:00** Mix and Mingle



2018/2019 ARQRV Committee

(Mike Fairbairn absent from photo)

President's Report

Reflecting on the past year, I realize just how much we at ARQRV have achieved. It has been so busy that at times I wondered if I was actually retired. The grant money received from the Department of Housing and Public Works was the impetus for the growth and change in the organisation and we are grateful for the opportunity to have been able to develop a range of resources for the benefit of members.

At our AGM last year we presented a first look at our new website. It is now fully developed and has been reviewed to ensure it reflects the current changes in Legislation. There are more changes to come and we will be making sure that it remains up to date.

We have produced a Residents Committee Manual and are finalizing a *Village Manager Guide to Working with Residents Committee*. This guide has been reviewed by both the Government and industry and will shortly be available for purchase by the operators.

Our new membership data base is up and running, the Newsletter has a "new look," a Manual for Membership Support Offers (MSOs) has been distributed and a new MSO newsletter launched. Six MSO Gatherings were held and this included flying MSOs from the regional areas to Brisbane. We have a Facebook and social media campaign and 3 short videos were produced to promote the work of ARQRV. Special thanks to residents who gave their time to "star" in these videos. We visited villages in Townsville, Mackay, Bundaberg and Hervey Bay as well as many villages in and around Brisbane and the Sunshine and Gold Coasts.

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JUDY MAYFIELD

Judy is the President of the association. It is her vision to transform the ARQRV into a robust and open organisation, actively supporting, educating and empowering its members.

Her focus is on advocacy and representation of the community in the political process.

Before retirement Judy was the CEO of a disability accommodation support organisation

**Under the *Right Where You Live* program,
ARQRV addressed almost 2000 residents
in 41 different retirement villages about the
changes to the *Retirement Village Act 1999*.**

**If you would like ARQRV to visit your village and host a
session on the changes to the Act, please contact ARQRV.**

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As President, I sit on the Ministerial Housing Council, I also presented at the Retirement Living Council's annual summit in Melbourne and the Leaders Summit (for CEOs in the industry) in Sydney. I was on the judging panel for Village Manager of the Year for Leading Aged Services Australia (LASA), also a peak body in the industry, and attended regular meetings with all the organisations involved in the Right Where You Live Project. I conducted sessions at Village Manager training forums and met a couple of times with the Presidents of the other State's residents' associations.

All this while continuing, along with the other members of the committee, the regular work carried out by ARQRV.

I am so grateful for the great team who developed all our resources, planned and delivered MSO training, and worked to upgrade the efficiency of our administration processes. Jan, Ray and Angela my sincere thanks for a job well done. You were all so efficient I had little choice but to keep up with the work you kept putting on my desk.

To my fellow committee members, thank for your input and for all the proof reading and feedback you provided during the year as well as continuing with you designated tasks. I am so appreciative of the wonderful team environment in which we all work.

Finally, thanks to all our members for continuing to support the work of ARQRV, without you our Association would not exist and after 28 years we must have managed to get something right.



JOHN RAE

John has worked as a chartered accountant in industry and commerce which included the Uganda Development Corporation in East Africa. He then worked as a management consultant advising on accounting system development, staff training and general management issues.

He was chief executive of an international valuation company specialising in industrial and commercial assets for accounting, insurance and marketing purposes.

After retiring, he carried out several assignments under the auspices of the Australian Business Volunteers program principally in the Pacific Islands.

Treasurer's Report

The Association has a strong balance sheet with some \$375,000 in the operating bank account and term deposits, very moderate liabilities and members' equity of \$350,200.

Income for the year, before government funding, was some \$27,000 higher than last year caused by increases in subscriptions, \$10,000, interest, \$6,000, donations, \$2,400 a sponsorship of \$6,400 and product sales of \$2,000.

Net profit for the year was \$38,222.

During the year we were advised by a chartered accountant and the ATO that we should charge GST on our subscription income. The GST liability from July 2015 was \$38,112. \$30,241 of this related to past years and was taken up in members' equity as a prior years' adjustment. By volunteering the information to the ATO we avoided paying penalties or interest.

Because of the need to include GST in our subscriptions, we have had to recommend an increase for next financial year.

This year management emphasis was on the continuing implementation of the BCC initiative. Project costs were for the year were \$223,265 and since project commencement, \$266,527, leaving an unexpended balance at year-end of \$23,473.

Mediation & Advocacy Report

I had harboured hopes that, with the changes to the Act, the tempo of incoming queries from members would abate. While the number of disputes handled may not have increased by very many, the length of time taken by some of them most certainly did!

The actions of members in some villages having chosen to align themselves with the scheme operator's position over an issue, for reasons known only to themselves, must be recorded. Notwithstanding in every instance ARQRV has been successful in presenting its case on behalf of members. And in every instance, save two, this has been done without implementing the available formal disputes procedure. Having said that, our success rate is down a little on last year and I accept responsibility for having taken on issues where it seemed that "natural justice" would not be served by hiding behind the fact that the issue was outside the remit of the Act or the resident's contract.

Ambiguities within the Act and the insistence of some operators believing that their contractual terms were not subservient to Queensland law in the form of the Retirement Villages Act, has caused a number of headaches, not to mention the need to take advice from the Department of Housing and Public Works and our legal adviser. For the record, State law in the form of the Retirement Villages Act overrides any Queensland written contract ... which includes retirement village PIDs. Go to Section 37 (4) of the Act for confirmation.

The effect of the new Section 135 of the Act (mostly anti bullying by village managers) has had little effect because it is still prevalent in the industry. What has happened is that instances are more difficult, and often impossible, to substantiate because the perpetrators, we have been told, ensure that there are no witnesses within earshot. The lesson here is that if you have an issue to discuss with your village manager which could become contentious, take a witness with you! Operator responses on the other hand have improved by our being able to remind them of their newly imposed obligation under S135 (2) (c) of the Act. (21 days to provide a "complete response").

It is appropriate to acknowledge the work of Barbara Irving, on resolving disputes south of the river and elsewhere, Ian Wallbank, on helping with building and constructional issues, Bruce Evans for advising on insurance related queries and Des Robinson for his work on budget related queries from members.

Finally:-The 11th of May 2019 has been and gone and, wonder of wonders, the sky is still where it was before and shows no likelihood of falling!

The disastrous effect of the impact on the industry of Section 63 (1) (c) of the Act (unsold unit 18 month buy back section) didn't eventuate! "Much ado about nothing", as a famous playwright once said!



MIKE FAIRBAIRN

Mike is a Vice President for ARQRV. Mike was formerly a manufacturing director of an international company responsible for 600 employees in three locations. He is accustomed to dealing with issues relating to industrial and commercial law and regulations. A good grounding for ARQRV advocacy work.



Judy Mayfield presented at the Retirement Living Council's annual summit in Melbourne and the Leaders Summit (for CEOs in the industry) in Sydney.

Six Membership Support Officer gatherings were held at venues throughout South East Queensland and this included flying MSOs from the regional areas to Brisbane.



ARQRV produced a comprehensive Residents Committee Manual. To date, 166 copies have been distributed to over 130 retirement villages.

**ARQRV HAS A TOTAL OF 6976 MEMBERSHIPS
(THIS INCLUDES PARTNERS AND SPOUSES)**

**THERE ARE 323
REGISTERED
RETIREMENT
VILLAGES IN
QUEENSLAND**



JAN SULLIVAN

Jan's long career in Credit Management within the Qld Building Industry has held her in good stead with creating good relationships with ARQRV clients.

As part of the ARQRV membership team, Jan is responsible for the upkeep and entry of membership details and payments into ARQRV's membership and accounting databases.

Jan enjoys spending quality time with her grandchildren. She also loves travelling just as much and often to Bali where she can be found sitting at the pool

Membership & Administration

It has been a very busy 12 months talking at our various Membership Support Officer (MSO) gatherings and taking over the role of accounts payable along with various other duties.

One of the highlights to the year for me was, along with our President Judy Mayfield, visiting several retirement villages in Townsville and Mackay during the last week of May 2019 where we met many village residents and discussed various topics. In particular, I enjoyed meeting both residents and some of our Membership Support Officers, it's great to be able to put a face to a name and to hear firsthand their positive experiences of being able to contact ARQRV with any problems or concerns.

Membership figures currently listed on ARQRV database total 4360 (which equates to 6976 individual residents which is 206 up from last year). Of this figure, annual member subscriptions total 1592 (64 up from 1528 this time last year) and 2768 Life member subscriptions (an increase of 75 from 2693 last year). There are 4 associate members. A total of 243 annual memberships were not renewed for the 2019 membership year.

A new purposely built cloud-based member database is currently being developed and implemented within ARQRV. The new member database will bring significant efficiencies to membership processing by automatically transacting incoming payments directly into the accounting database.

Our Residents Committee Manual has been a huge success with many compliments being passed our way for how useful it has become to various retirement villages. Some even purchasing a copy for every member of the residents committee. So far, the ARQRV office has posted 166 manuals to both Residents Committees and ARQRV members. Plus 11 villages have purchased the "Help Desk" for the residents committee

I wish to extend a special thanks to Sandra Mackie who assisted me in our very busy membership months of November 2018 to January 2019 and then stayed on so that I had the space to take on all the duties of the accounts payable role.

Also, a big thank you to Cody Heit from SACKO Burpengary who has been invaluable in his ongoing assistance of I.T. support and with building the new CRM database of which I am very excited.

Available now !!

'RESIDENTS COMMITTEE MANUAL'

A comprehensive guide for running or forming a residents committee

Every village is entitled to a free copy or purchase extra copies for \$38.50 each



BARBARA IRVING

Barbara is a Vice President for ARQRV on this her second time around on the Committee.

Her main focus is on advocacy for the Residents in Retirement Villages south of the Brisbane river.

Her past careers have included secretarial and reception work. After retiring she took up voluntary work in counselling and palliative care.

Mediation & Advocacy

During the past year, two issues stand out that were of concern to residents and both involve, to a degree, residents committees.

Budget concerns always seem to be on the agenda one way or another. Only a residents committee can request the scheme operator to attend a meeting before the start of the financial year to discuss the draft budget for the general service charge, maintenance reserve fund and capital replacement fund; section 129B of the *Retirement Villages Act 1999* (RV Act).

When checking the draft budget it is the responsibility of the committee to ensure that all surpluses/deficits of the maintenance reserve fund are taken into account and correctly brought forward each year; (RV Act section 102A (6)). If there is no residents committee then, hopefully, a sharp eyed resident will check the budget figures.

It is a breach of the RV Act to accumulate surpluses/deficits. Accumulated surpluses in particular could cause a problem such as the budget possibly being manipulated by the use of creative accounting, using the accumulated surplus to make the budget appear to be compliant.

The other major concerns regarding resident committees have been varied, but serious in that none of the concerns should be happening. They include;- bullying/intimidation of residents both at general meetings and within the village figured prominently; incorrect timelines given for special resolution meetings; no minutes taken at meetings; committees taking decisions without referring to residents and generally acting as though they were scheme operators.

The list could go on and many emails and phone calls could be avoided if:-

- All residents committees remembered that they are NOT a decision making body.
- Resident committees accepted that they are accountable to all the residents and have only the authority delegated to them by the residents.
- **ALL** residents were treated with respect and not with bullying and intimidating tactics.

All resident committees should have received a free copy of the ARQRV publication, which gives a complete guideline, entitled "The Role of the Residents Committee".

Finally, let me thank, in particular, Des and John for their financial expertise, Judy and Mike for 'filling in the gaps' and all of the committee for their support because many finalising of issues are due to a team effort.

Check out the ARQRV website at...

WWW.ARQRV.ORG.AU

Committee Members



DES ROBINSON

Des has been a senior partner in an accounting practice, chairman of an organisation with 900 employees, a director of a company with over 3,500 employees and has owned and operated a number of businesses. Des's interests are in accounting, finance and corporate governance. Currently he is chairman of the residents' committee at his retirement village.

Prior to retirement, Brian and his wife Diane, successfully owned and operated, a trucking business, coach company, four hotels, a 200 bed resort and a large ship brokering business. Having a large chequered and successful history, in many varied businesses, Brian also assists residents understand the benefits of ARQRV in his role as membership support officer for Beachmere Sands Retirement Resort.



BRIAN MCKAY



THEA BIESHEUVEL

In the past, Thea has undertaken roles in the area of management development and corporate creative writing. Thea holds a few degrees, one being management (Oxford) and others are in the science area related to history and philosophy. Thea is also a past chairperson of her current retirement village.

Before retiring, Peter had a long career in the telecommunication industry. Peter is also part of the membership team and assists in the ARQRV office. He has a love of music and travel.



PETER SMYTH



STEPHEN IRVING

Now retired after two careers as a high school teacher and a TAFE librarian, Stephen enjoys writing articles promoting his interests. They include ARQRV, Table Tennis and the Entertainers' groups at the Beenleigh & Districts Senior Citizens Centre. Travel (particularly cruising) and singing (including karaoke) also give Stephen great joy.



RAY JORDAN

Ray has just finished a project as a Community Educator with COTA (Council On The Aging) as part of the Queensland Government funded Building Consumer Confidence Initiative. Ray visited numerous retirement villages in south-east Queensland to explain changes to retirement village law and to promote the good work of ARQRV. He also presented to various community groups about options for retirement living.

Ray remains employed part-time by ARQRV under the Government funding. He is now writing a guideline for scheme operators entitled 'Working with Residents Committees' which is a companion to the Residents Committee Manual. He is also writing further technical articles for the ARQRV website to assist prospective and existing residents.

He will soon take on a volunteer role visiting villages to promote ARQRV membership.



ANGELA JORDAN

Angela has just finalised various projects for ARQRV, in the last 18 months, under the Building Consumer Confidence Initiative funded by the Queensland Government.

Among other things, Angela has produced a useful manual, and introduced a regular newsletter, for ARQRV Membership Support Officers across Queensland. She is also responsible for the new look newsletters and other publications.

Angela continues to work part-time for ARQRV as the publications officer.

Building Consumer Confidence Project

Background

Recently ARQRV completed an 18-month project, in conjunction with other agencies, funded by the Queensland Government to inform community members and retirement village residents about changes to the *Retirement Villages Act 1999* and to build capacity for residents to represent their interests to scheme operators of retirement villages. The project was conducted under the branding *Right Where You Live*.

ARQRV engaged two part-time project officers to draft a Service Delivery Plan to secure the funding and to deliver the various outcomes stated in the plan.

Project objectives

Four key objects were identified for ARQRV, namely –

- Educate existing residents about details of legislative changes and how the changes affect them.
- Improve resident's knowledge about important matters relating to retirement village operation to better represent their interests to scheme operators.
- Grow the capacity of ARQRV to assist a greater number of members and residents generally.
- Grow the membership of ARQRV so that more residents may obtain assistance, when needed.

Project outcomes

The following deliverables were provided by project officers within the timeframe and budget, to meet the key objectives

- Produced and distributed, to retirement villages, a comprehensive residents committee manual with practical examples
- Produced a refreshed website with increased accessibility for members and functionality for membership transactions.
- Delivered information sessions about legislative changes and promote the work of ARQRV to residents in retirement villages widely throughout Queensland.
- Provided additional support to Membership Support Officers through a new MSO handbook, a new MSO newsletter and face-to-face information sessions.
- Produced and distributed new ARQRV promotional material with a consistent corporate theme, including brochures, newsletters and website.
- Produced a saleable package suitable for village managers to better understand the operation of the residents committee in their village.
- Conducted a video based promotional membership social media campaign.









The Association of Residents of Queensland Retirement Villages Inc

OUR VISION

To be Queensland's leading advocacy organisation for residents living in a retirement village




OUR GOALS

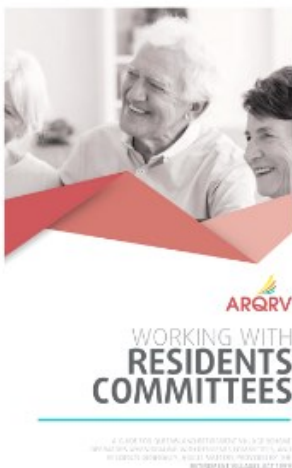
-  To ensure legislation protects the rights of all retirement village residents
-  To advocate and support members
-  To inform members of retirement living issues
-  To increase awareness of residents' rights in a village
-  To offer information and training to residents' committees
-  To educate and empower members

OUR MISSION

To provide representation, information and support to members that allows them to live a life of quiet enjoyment in the retirement village of their choice

OUR FOUNDATION

-  A competent committee
-  Effective and efficient practices
-  Commitment to growth and on-going development of the Association



Our strength and effectiveness relies on a strong membership base. We encourage residents to join us to form a strong and active voice for residents in retirement villages. Annual and Lifetime memberships are available. Please contact us if you would like to know more.

General enquiries:

Email: enquiries@arqrv.org.au

Phone: 0437 906 074

Membership enquiries:

Email: membership@arqrv.org.au

Phone: 0429 098 417

Postal Address:

PO Box 5057

BRENDALE QLD 4500

Web: www.arqrv.org.au

ABN 138 466 73994

IA 11602

Office hours may vary, if there is no answer, please leave a clear voice message and your call will be returned at the earliest convenience.

*Have you considered volunteering for the ARQRV Committee?
As the number of retirement village residents in Queensland
is increasing rapidly, so do the number of ARQRV members.*

The services we offer to members is also increasing.

*We need your skills to further develop the services to our members and
to ensure their lifestyle is enhanced and their rights and financial investment is
protected. You do not need to live in Brisbane as you can attend the monthly
committee meetings via teleconference.*