

Allocation of Amherst Units Policy

Policy No: 6.2

Qualifying Criteria

To be eligible for an Amherst Village Unit, you must be;

- at least 65 years of age;
- retired from full-time employment;
- using the unit as your permanent place of residence; and
- capable of living independently - must provide a medical certificate on approval of application to reside and then annually to certify independent capabilities.

Council Representative/s

The Council will nominate a representative/s to implement this allocation process.

Phase 1

1. Council is to establish;
 - a) an in-going fee and refund or exit payment arrangement;
 - b) a fortnightly service fee (paid to the Operating Account), with a policy clearly stating what this fee covers, where the money is paid to by the Resident and how the funds are paid out and by whom, as well as the quarterly and annual reporting to the Residents, as required under the legislation.
 - c) a set of guidelines to which Residents must agree and which also covers the process of dispute resolution and the Owner's responsibilities.
 - d) a termination process clearly stating the required steps and all financial implications.
 - e) An invitation process for those prospective Residents on the waiting list to express an interest in taking a unit under proposed terms.
2. Invite those on the waiting list to express an interest in taking a unit on the proposed terms.
3. If more than one person on the waiting list expresses an interest in taking a unit on the proposed terms, the following priority will apply;
 - a Katanning resident of >5-years has priority over a person who has been a resident for <5-years.
 - a person higher on the waiting list has priority over someone lower on the waiting list or not on the waiting list.

Phase 2

1. If no person on the waiting list submits an expression of interest on the proposed terms, the Council will issue a second invitation to those on the waiting list and place an advertisement in print & social media inviting submission of entry-payment offers.
2. The unit will be allocated to the person who makes the highest entry-payment offer.
3. If two equal offers are received, waiting list order takes priority.
4. If none from the waiting list then Council's representative will interview competing bidders & will recommend the unit be offered to the person they think is the best fit.

General

Under Phase 1 or 2;

- a) The recommended person will be required to demonstrate their ability to meet their in-going payment obligation to maintain their priority.
- b) Council will vet and approve the recommended person. Things that may be considered include:
 - Cleanliness and order of existing home.
 - Social demeanor and interpersonal skills.
 - Rental and/or personal references.
 - If there are pets being considered, breed and temperament of animal including how it handles strangers.
 - Physical suitability and assessment of required medical certificates.
- c) Council reserves the right to allocate or not allocate a unit to a recommended person at its sole discretion.
- d) Council will ensure that Disclosure Documents, Form 1 and the Residency Agreement are prepared and presented according to prevailing legislation and regulations relevant to a retirement village.

Council Procedure

Council's representative/s to present the recommended person to Council.

Council to vet and approve the recommended person prior to execution of the new Residency Agreement.

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Source: Community Services and Facilities

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Review

Responsibility: Executive Manager Corporate Services