

Retirement Village Residents' Experiences of Contracts and Outcomes: Pilot Project

Synopsis of Results



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Synopsis of Results

Purpose of this document

This document is a synopsis of results of a survey conducted in 2015 of a sample of current residents of retirement villages in Victoria. It was funded through a small grant from the Residents of Retirement Villages of Victoria (RRVV) Inc. The survey was undertaken by the National Ageing Research Institute (NARI).

Background

RRVV Inc acts as a representative body for its Victorian members currently living in retirement villages. It provides education, advice and advocacy and aims to contribute to policy debate regarding the issues affecting retirement village residents. RRVV is an independent organisation funded by Consumer Affairs Victoria through the Victorian Property Trust and by resident membership fees. It was established in 2006 and represents approximately 40,000 village residents across Victoria. It has a member base of 6500.

Recent surveys funded by industry peak bodies indicate that many retirement village residents report their happiness and life satisfaction improves upon relocation into a retirement village (McCrindle Baynes 2013; 2011). Moreover, many also express satisfaction with the way owners and operators run their villages (McCrindle Baynes 2013; 2011). However it is unclear whether independent research would reach the same conclusions.

As highlighted in submissions to the Productivity Commission's review of the aged care sector in 2011, there may be issues between residents and owners/operators which arise from contractual disputes and these can detract from their overall positive experience (Choice 2011). Further, it has been suggested that many residents are reluctant to discuss these experiences (COTA-TARS Discussion Paper 2011).

In a press release in 2014 (RRVV 2014), RRVV argued that the inadequate nature of current State regulations might lead to the exploitation of older people by the owners and operators of retirement villages. Responding to its members' ongoing concerns, RRVV Inc identified the need to examine the impact on village residents of their interactions with owners and operators.

To this end RRVV engaged NARI to design, administer and evaluate an independent survey of village members' (and/or their families). The survey canvassed views regarding the contract experience, the outcomes of that experience and associated interactions with management and owners which may have occurred at a number of stages : pre-entry and whilst in residence. It also asked about contracts and what might be expected upon exiting villages.

Recent changes made to Victorian Legislation, the Retirement Village Act via the Retirement Village Amendment (Records and Notices) Regulations and Retirement Village Amendment

(Contractual Arrangements) came into effect on 1st July 2014. The flow-on effects of these changes are yet to be assessed. It is hoped the results of the survey will provide some insight into how these changes may have impacted those now living in retirement villages.

Ethics

Ethics approval for a low and negligible risk project was sought and received from Melbourne Health, Human Research Ethics Committee on 1st July 2015 (project ID# HREC 2015.102).

Survey

The survey was designed in consultation with NARI and RRVV. The research question which governed the survey's design was:

What are the experiences of retirement village residents and their families of their contractual interactions with village owners and managers – including during the transition into the village, their residential experience and transition out of the village?

The survey consisted of a series of questions about residents' and/or families' experiences of:

- the contract process
- the outcomes of that process, including affordability, maintenance and repairs, and interactions with owners and managers, and
- disputes and the resolution of dispute processes (if applicable).

The survey consisted of 38 questions in total (Appendix 1). The design of the questions included a mix of response types, such as Likert scales ranging from 0 – 10, where, for example, 0 = not satisfied, 10 = completely satisfied, and 5 = mid or neutral point; yes/no answers; or tick box questions; and open-ended qualitative questions. The survey included a number of demographic questions, including age, number of retirement units in the person's village, length of time living in retirement villages and the reasons for moving into one. Scales of self-rated health and life satisfaction were included to assess the correlation between dispute factors (if any) and resident quality of life and perceived health. The general health question was based on question 1 of the Medical Outcome Study: 36-Item short form survey instrument (Ware 1992). The life satisfaction question was based on work done by Van Praag (2003).

The survey was sent out in paper form to all members of RRVV in their quarterly newsletter, together with a postage paid envelope for return of the survey. A link to an online version (Survey Monkey) was included on the RRVV website and also in the newsletter for those who preferred to fill in an electronic version of the survey. To ensure privacy and confidentiality – and to encourage candid responses – the survey was anonymous and no individual or particular retirement village was identifiable from the responses. All survey responses (paper versions (mail) and online surveys (downloaded)) were returned to the project team at NARI. Data was entered into an Excel database and analysed using SPSS statistical software package (version 22). Frequencies and standard deviations (SD) are provided for quantitative data and Spearman's rank correlation coefficient used for analysis of correlation. Qualitative responses were categorised into themes based on the research questions.

Results

Six thousand, five hundred (6500) paper surveys were sent out to the RRVV membership base; 1813 were returned in paper form, and 63 online surveys were completed. Overall 1876 surveys were received (N), equalling a return rate of 29%. Not all respondents answered all questions, so the number of responses (n) for individual questions varies.

Demographics

Ninety percent (90%) of all respondents were aged 70 years and over, with more than 50% aged 80 years plus.

Table 1: Age of respondents

Age range, years (n = 1829)	Percentage (%)
50-59	0.7%
60-69	9.6%
70-79	37.8%
80+	51.9%

The length of time residents had been living in retirement villages varied (Figure 1, n = 1846), ranging from less than one year (5.1%) to more than 10 years (26%).

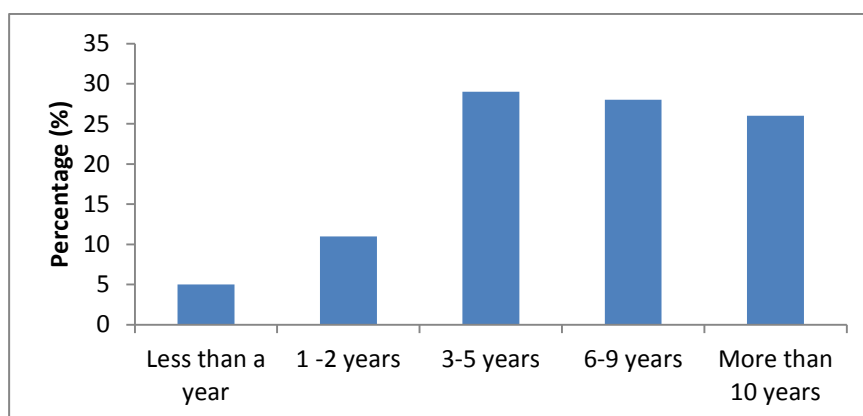


Figure 1: Length of time living in retirement villages (n = 1846)

There was a large variability in reported village size and villages included a mix of units and apartments. The smallest reported size was 6 dwellings, and the largest held 650. The average number of dwellings reported by respondents (n = 1645) was 162 per village.

Of those who responded to the survey, a concern for safety represented the most common reason for moving into retirement villages (67.4%), followed closely by the need to downsize (60.4%).

The availability of onsite 24/7 care (30.2%) was of least concern, although it was still an important motivating factor for nearly one-third of all respondents (see Figure 2).

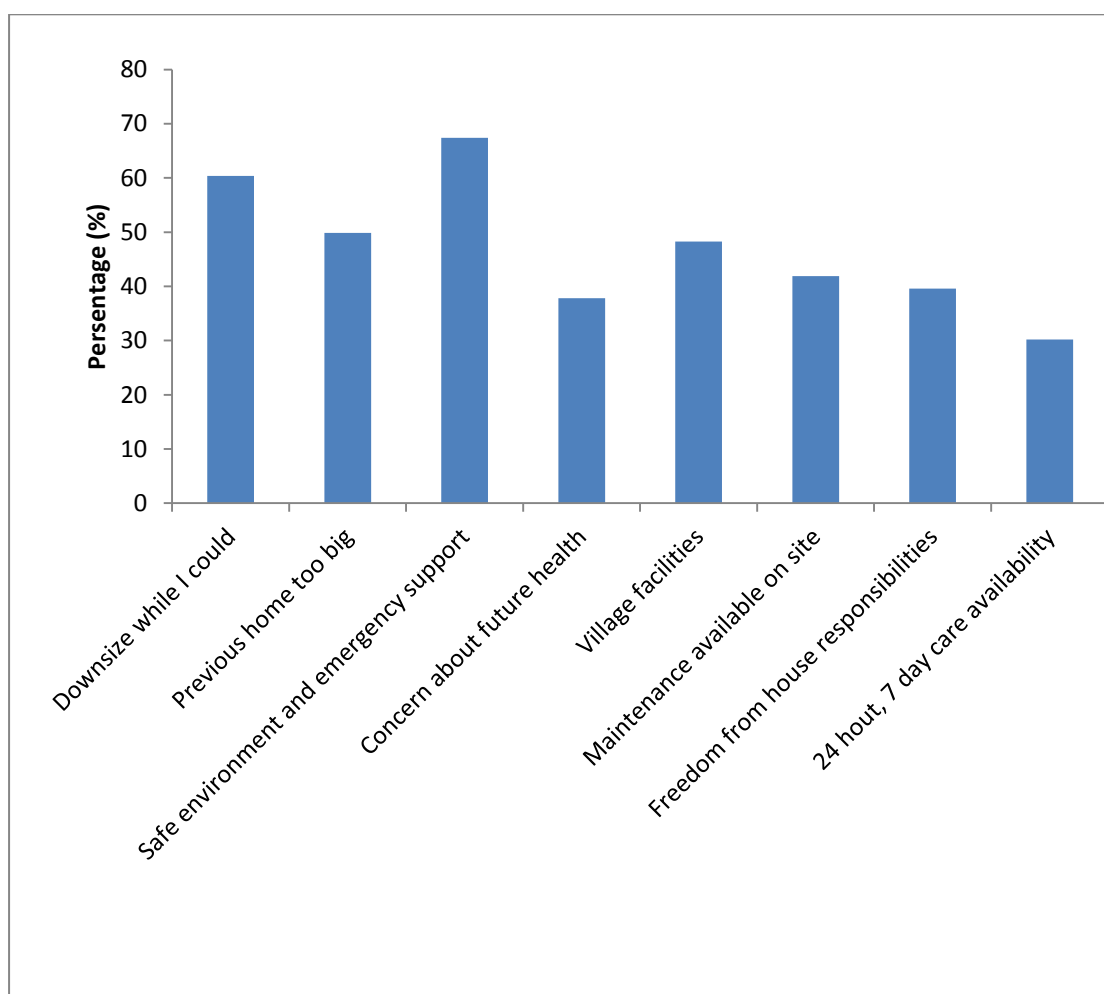


Figure 2: Reasons for moving into retirement villages
(multiple reasons may have applied)

Health and quality of life measures

To assess quality of life, we asked residents how satisfied they were with their life as a whole (Van Praag 2003). On average, the response was positive (mean = 7.9, SD = 1.8 where 1 = not satisfied and 10 = completely satisfied). The results were very similar for emotional health (mean = 7.9, SD = 1.9).

In terms of self-rated health, over two-thirds of respondents rated their health as good to excellent (77.2%) and 22.8% rated their health as fair to poor (see Figure 3).

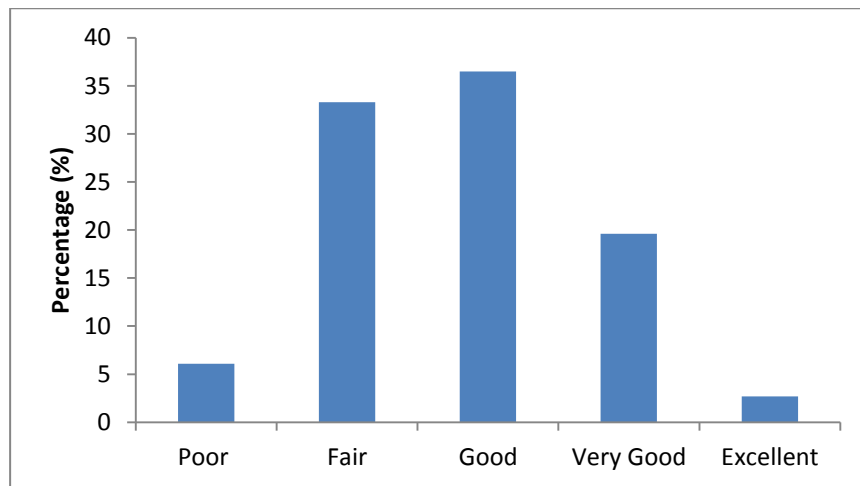


Figure 3: Survey respondent's self-rated health (N=1842)

Retirement village life

For the most part, respondents rated their experience of retirement village life as positive (mean = 7.6, SD = 2.1) and would recommend retirement living to their family, friends or colleagues (mean = 7.2, SD = 2.8). There was also a moderate, significant correlation between resident experience of retirement village living and emotional health ($r_s = .499$, $p < 0.00$).

Issues requiring managers/owners attention

Issues prior to entry

Respondents were asked whether they had any issues (contractual or otherwise) which needed resolving before they moved into their retirement village. Whilst the majority indicated there were no issues prior to entry, over one fifth (21.6%, $n = 406$) reported experiencing an issue. These responses were identified according to a number of themes. A sample of participants comments are provided here:

Complicated, poorly written contracts

- "The whole procedure was very complicated"
- [the issue was]..... "Definition of which parts of unit were my responsibility to maintain"

Delays in access to the units/apartments

- "Unit unfinished on time"

Condition of the unit/apartment on moving in

- "Renovations incomplete. Garage roller door not fully operable. Windows uncurtained"

Availability of facilities stated in the contract

- "The pool and community centre was and is a long way off"

Financial arrangements on leaving village

- "Length of time to access money when leaving"

Although more than half (58%) of these 406 respondents reported that their issues were resolved before moving in, 42% (n = 170) indicated theirs were not. The respondents whose issues were resolved were generally satisfied with the outcome (mean score = 6.4, SD = 3.0). However, for those whose issues were not resolved, respondents felt the likelihood of the issue being resolved in the near future was low (mean = 3.7, SD = 3.4).

Whilst living in retirement villages

Almost 70% (n = 1250) of respondents indicated that they had, at some stage, reported a matter requiring the village manager's attention. The majority of these issues included general maintenance of some kind, most of which concerned outdoor environments. These include common garden maintenance tasks (e.g. trees and leaf removal, gutter cleaning), plumbing repairs (e.g. storm damage, water leaks and toilet repairs), cooling and heating issues (e.g. installation or repair of air conditioning units) and fencing issues. Other issues brought to the attention of managers included security concerns, noise issues (e.g. barking dogs) and relationships between residents.

Of these 1250 respondents, 62% had their issues satisfactorily resolved, whilst 38% did not. The time taken for matters to be resolved to resident satisfaction varied – from being dealt with immediately and promptly, to days, weeks, months or years and in some cases issues had never been resolved. When issues were not resolved, respondents rated the likelihood of future resolution as low (mean = 3.7, SD = 3.2).

In terms of the time taken to make decisions about issues which affected respondents directly, the results indicate that managers/owners are taking longer time than respondents would prefer (mean = 6.1, SD = 2.9).

One-fifth (21.1%, n = 337) of respondents (n = 1786) reported they needed to contact regional managers or higher personnel regarding issues affecting them. Of these, approximately one-third were resolved positively, whereas two-thirds of respondents reported a negative outcome. The following qualitative responses provide an illustration of the range of outcomes experienced by residents:

- “Dealt with by management company to my satisfaction”
- “The person listens but rarely is any action taken”
- “Mutual satisfaction/resolution”
- “Waste of time”
- “Negative – ridicule”
- “The owner came to talk to me. Outcome satisfactory”
- “..... I received an insulting and patronising letter from management”.
- “They tried to have me moved from the village because I had a part-time job - I had to get help from Consumer Affairs”
- “Eventually with legal assistance”
- “Nothing changed. They have you tied up”
- “Treated with disdain”
- “Not resolved. Rules and regulations ignored”

Disputes

Whilst most respondents indicated their retirement village had a resolution process for disputes, 32% indicated they did not know if such a process was in place at their village. The majority (70%) of respondents also indicated their managers used a dispute resolution process when issues arose, and they thought that management handled disputes or concerns that affected retirement village life moderately well (mean = 6.2, SD = 2.8).

There was a moderate, significant correlation between resident life satisfaction and how well respondents thought management handled disputes or concerns (r is 0.438, $p < 0.001$) and a weak but significant correlation between how well respondents thought management handled disputes and respondent's emotional health (r is 0.297, $p < 0.001$).

Relationships & interactions with managers/owners

The survey respondents indicated their interactions with managers/owners were generally satisfactory (mean = 7.2, SD = 2.8) and that village managers were mostly available to residents when they were needed (mean = 7.4, SD = 2.4). On average, respondents felt comfortable about voicing concerns to their manager/owner (mean = 7.1, SD = 2.8).

Change of ownership or change of contract

Nearly half of all respondents (44%) reported their village had experienced a change of ownership or a change of contract. Some general comments included "Smooth changeover – new owners very experienced", "Change of ownership very positive", "I think the new owners are better" and "No particular changes obvious". These examples indicate that ownership and/or contractual changes were welcome for some residents. However the change of ownership or contract changes presented some challenging or negative results for others.

Whilst the following quotes are not definitive, they provide an illustration of the types of comments received. The qualitative responses are presented according to their over-arching themes.

Communication issues and/ or the "change process"

Resident respondents indicated variability in regards to how change was communicated generally.

- "Terrible feeling of uncertainty about the future".
- "2 changes of ownership - first change - bad news for residents - second change - much better. Now well managed"
- "As far as I am aware the village was sold and a new manager installed without any interaction or consultation with members of the village"
- "Improvement in communication"
- "Had a forum when committee explained changes - all voted on and accepted"

Reduction in services

In some cases, on-site services to residents were cut or reduced.

- "Now don't have live in managers. Completely under multi-national company"

- ““Family" to "corporate" style. Cost cutting by current owners”
- “Contractual amenities/services abandoned”
- “No longer 24/7 nursing”

Contracts

Residents’ comments highlighted the differences that occurred when ownership and/or contracts were changed and/or revised.

- “Improved clarity of financial issues”
- “New contracts; no sense of stability regarding policies”
- “New purchase contract has no monthly maintenance to pay”
- “Original management agreement not adhered to as promised”
- “Originally all units strata title. Now original builders buying units and leasing (same directors as management company). Have admitted want to own over 50% so that they can vote against owners corporation and take control”

Policies

For some residents new owners brought new processes which could be either positive or negative for residents.

- “New owners use dispute process”
- “We now have more "don'ts" - everything more controlled”
- “The removing of a number of privileges”

Financial & contractual matters

Pre-entry to village

Respondents were asked how easy it was to understand their pre-entry purchase contract, on a scale where 0 = difficult and 10 = easy. The average response was 6.0 (SD = 2.6)..

Whilst living in retirement villages

Of the 1682 who responded to the question about the monthly maintenance charge or service fee, the majority (68%) indicated they thought the fee represented good value for money, whilst 32% thought it did not. When respondents were asked to indicate what amount they thought represented value for money, the average response was \$ 328.00 per month (SD = 174.9). Responses were varied, and ranged from \$ 20.00 – \$ 1700.00 per month.

Exiting retirement villages

Respondents were asked whether they understood their contractual obligations on leaving their retirement villages (e.g. the exit process, selling). The mean response was 7.1 (SD = 2.6), indicating a moderate understanding.

In terms of the outgoing Deferred Management Fees, the respondents rated their understanding as a mean of 6.9 (SD = 3.1), where 0 = not understand at all and 10 = completely understand.

Additional information provided by respondents

The last question of the survey gave respondents the opportunity to provide further anonymous information about issues of significance for them. Of the 1876 surveys returned, 135 (7.2%) responded to this question.

Once again the qualitative responses are grouped according to their over-arching themes and a small number of quotes provided for illustrative purposes. It must be borne in mind that these views are provided by a small number of respondents, as the vast majority did not answer this question. Nevertheless, this sample of responses provides evidence of issues of concern for some retirement village residents.

Management

- "I feel our manager could be a lot more sensitive to elderly people's physical problems - it seems- if we are not as fit & well as he is - then we seem to be a real nuisance to him and very inclined to intimidate anyone with a complaint".
- "The manager/committee of management do not keep us informed or seek our opinions on matters affecting the residents".
- "Management bullies and interferes with role and decisions of owner's corporation committee".
- "We cannot solve a dispute - an ant against an elephant".
- "Most of the residents hesitate to be involved. Management just bulldoze their way on with what they want"

Maintenance/Building/Services

- "Our Manager not interested in Village. Have reported this on many occasions. Owner has given us a representative..... to help. attends our committee meetings and is very helpful. Willing to help us and listens, things much better".
- "Dispute over faulty structure. Still awaiting resolution on this problem! Management could be more transparent in their actions towards owner/residents, bullying & harassment by village manager. Not resolved by Management. Need ombudsman to handle complaints"
- "Owner has not fulfilled their promises for infrastructure but our service fees have not been adjusted accordingly. The owner is a developer and has no respect, morality or ethics about the lifestyle of retired residents. We still do not have a clubhouse, yet we are paying for it in our service fees".
- "I find it very difficult that village long term maintenance funds have to be used to replace the owner's assets. My understanding is that this is not the case in other states of Australia".
- "My problem arose in the "refurbishment costs" they tacked on all sorts of things to the list".
- "I feel management wait so long that tenants end up repairing incidents themselves because of inconvenience and stress".
- "The biggest problem is lack of building and garden maintenance due to the body corporate manager ripping off the residents, not spending any money on the property".

Health and Safety

- “My unit is next to a creek which fills with rubbish and rats and mice have been in my backyard. The smell is really bad. The manager will not do anything so I have to ring the MP’s office to regularly get it cleaned. The manager listens but does not act on much at all. Residents complain constantly”.
- “Several lack of appropriate care concern assessment by residents. Disrespect from staff disrespect of concerns + complaints non nutritional food provision in dining room”.
- “A dangerous dog, biting & attacking others & staff. Dog after 3 years removed from village”
- “Onsite 24/7 staff to have off site after hours staffing for emergencies I was involved with defeating this proposal by management. Currently we still have 24/7 staff all of whom have at least basic nursing qualifications”.
- “After a heavy fall due to disrepair of footpaths in newly opened area causing cracked ribs, lots of soft tissue damage bruising & grazes, management/owners denied negligence and refused temporary assistance around everyday living stating I lived in the independent living village and not the aged care area. Management tried to sell me one of their own Home Care packages”

Residents Committee

- “The Manager draws up the agenda and does the minutes of all Residents Committee meetings. So I found it a complete waste of time! Unfortunately ... completely dominates this committee”.

Contract/Sale

- “I lived in a retirement village for 4 1/2 years. I decided to leave and move to a village closer to my children. The exit fees they tried to charge were horrendous. The DMFs were OK, but the refurbishment fees were ridiculous. I was not consulted at any time, and had virtually no feedback from the [person] doing the selling of my apartment. I had to consult a solicitor to get \$8000 taken off my bill. It was a leasehold contract, and at no time did I sign any documents relating to the sale, and from the time of agreeing to sell until settlement was 8 months. They later admitted to the Residents Committee that mistakes had been made but never to me did they say that”.
- “When we moved into the village we were shown plans for the community centre and a map showing the final stage of villas to be constructed. Both, we were assured would take place soon. After more than 2 years we are still waiting. This has caused an ongoing dispute between the residents and the owner/developer”.
- “The overall attitude of village owners appears to be make the maximum amount of profit with the minimum of expenditure. Until a couple of years ago refurbishment costs when leaving the village was an average of \$12 - \$15,000.00. The owner is now sending out work pricing documents for refurbishment of \$55 to \$57,000.00. when seriously challenged reduced to 15 to \$20,000.00”.
- “I cannot afford to leave village now I am a widow, the refurbishing costs and sales costs are too unfair on residents have to wait 3 months before they put the unit on the market paying maintenance until unit sold and it’s been up to 3 years to resale some units”.

Discussion and Conclusion

Nearly 2000 responses were received for this survey, which indicates that many older adult residents of retirement villages were keen to be involved and have their say about retirement village life. The following discussion is a synthesis of the results and presents an overall conclusion, followed by recommendations arising from the data.

The recent 2015 Price Waterhouse Cooper (PwC) and Property Council Retirement Census indicates that the average age of residents is 81 years and the average age at which a resident moves into a retirement village, is 74 years of age. For the current survey, half the survey respondents were aged 80 years or more, and nearly 90% were aged 70 and over.

Motivations for moving into retirement villages were varied (for example a concern for safety, downsizing, previous home was too big) and could be for more than one reason. This result is in line with industry reports which show a combination of push/pull factors contributing to older adults' desire for retirement village living (McCrindle Baynes 2013).

Overall, respondents appeared satisfied with their life and their emotional health and the majority rated their health as good to very good. For the most part, respondents regarded retirement village life as a generally positive experience and would recommend it to their family, friends or colleagues. Emotional health was also moderately positively correlated with retirement village life. How this result compares to older people not living in retirement villages needs further investigation.

Whilst most new residents experienced no issues (contractual or otherwise) which needed resolving prior to taking up residence, nearly 22% reported issues that were of significance to them, such as delays, building issues, availability of promised facilities and complicated or poorly written contracts. For some these issues were not resolved before moving in and were unlikely to be resolved in the near future.

For communal living facilities, maintenance is offered as part of retirement village life. This is reflected in the high proportion of respondents indicating they reported a matter requiring the village manager's attention, most of which were general outdoor maintenance issues. The results were generally positive, as many managers' responded immediately and promptly, and issues were resolved to residents' satisfaction. However, for some residents issues took a long time to be resolved and in some cases these issues were never resolved and were unlikely to be so.

This raises issues about dispute resolution procedures. If such a process is in place, why is it failing for some residents? While many residents reported the presence of a dispute resolution process, it appears in many of these cases that it was not effective.

One third of respondents were unaware if their village had a resolution process in place. Consumer Affairs Victoria outlines good practice protocols for resolving disputes in retirement villages and can act as a mediator in such a process. All villages should have dispute resolution processes and ensure this is highlighted to new residents as they enter the village.

There was also a concern with the time taken to respond to residents' requests, as survey responses indicated this was not as timely as some residents would like it to be. Managers and

owners need to acknowledge this and communicate effectively with residents about the processes involved and the timeframes required before decisions can be made, particularly when matters are complex, substantial or sensitive.

One-fifth of all respondents reported they needed to contact regional managers or higher personnel regarding issues that affected them. These issues may be ones of an intricate nature and/or involve issues related to the role of the managers. Two thirds of these respondents had not had their issues resolved to their satisfaction. Regional managers and owners therefore need to ensure appropriate communication with residents in a professional manner.

It appears that there is a correlation, albeit moderate, between resident life satisfaction and how well respondents think management handles disputes, and a weak correlation between how well management handles disputes and respondent's emotional health. No causal relationship can be inferred from the data, as emotional health and life satisfaction are complex issues and can be influenced by many other factors, for example, health, housing, financial status, family relationships, leisure activities, social isolation and so on. Nonetheless, these results are interesting and would benefit from further research.

Nearly half of the respondents experienced a change of ownership or contract changes at their villages. Although not always within village operators' control, all potential residents need to be informed of the possibility of this prior to entering retirement village life. If a change of ownership does occur, appropriate independent support should be available to residents during the negotiating period, so that all changes can be communicated effectively and with full disclosure.

Recommendations

The results indicate that survey respondents were generally satisfied with retirement village life. There are, however, a number of recommendations for owners/managers arising from the results of the survey. These recommendations could help improve processes and may assist in alleviating residents' concerns regarding unresolved issues and, in particular, changes made to contracts or changes in ownership/management structure.

1. Communication

- Taking a person-centred approach to all resident interactions would greatly enhance relationships between all parties.
- All village managers would benefit from receiving training in effective communication.
- Developing and implementing a clear, effective communications policy which takes into account residents' rights to know what is going on is important. Keeping residents informed of changes in a fair and transparent manner may circumvent the loss of autonomy which some residents can experience. Such a policy may also help to explain reasons for time delays.
- Change of ownership is usually based on economic decisions, which are outside of residents' control. However communicating all changes in a timely and respectful manner may overcome many barriers and misunderstandings.

2. Dispute resolution processes

- The development, if none exists, and implementation of a dispute resolution process could help avoid (and resolve) many residents' concerns regarding unresolved issues.
- Where dispute resolution processes do exist, it is incumbent on managers/owners to ensure these processes are followed and issues resolved in a timely manner.
- All village managers would benefit from receiving training in developing skills in impartial and equitable dispute resolution processes.

3. Residents' Committees

- All villages should have an effective residents committee, independent of village managers, which can discuss matters of concern and can provide direct representation to managers/owners. In the absence of such an independent committee, the balance of power rests with the owners/managers which, in some cases, can be difficult for residents.

This report provides a snapshot of the results of the recent survey. The results are interesting and highlight some areas that warrant further investigation.

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About NARI

NARI (the National Ageing Research Institute) is an independent, not for profit, research institute that aims to be the centre of excellence in Australia for research into ageing and improving the quality of life and health of older people. NARI has extensive experience in research, evaluation and education in the area of health promotion, particularly in terms of active and healthy ageing. We conduct independent, non-biased research which helps older people lead healthier lives, manage chronic diseases better and continue to contribute to the community as carers, workers and volunteers.

Appendix 1 Copy of Survey



Retirement Village Residents' Experiences of Contracts and Outcomes

1. Retirement Village Residents' Experiences of Contracts and Outcomes Survey (Anonymous)

Residents of Retirement Villages Victoria (RRVV) Inc have requested a survey of members regarding their experiences with managers and owners of the villages in which they reside. The National Ageing Research Institute, an independent not for profit research institute (<http://www.nari.net.au>) has been funded by RRVV to undertake this survey.

The aim of the survey is to collect information about RRVV members' direct views and experiences of interacting with managers and owners of retirement villages. It also includes information about health, contracts and disputes. Each member of RRVV has been sent a paper survey for completion. Alternatively you can complete the survey at Survey Monkey https://www.surveymonkey.com/r/NARI_RRVV_Resident_Survey

Please note:

* You do not have to complete this survey if you do not want to

* Your participation is completely voluntary

* Fill in the questions you feel comfortable answering

* This survey is anonymous. The researchers or RRVV have no way of identifying who has completed each survey and it will not be possible for you or your retirement village to be identified in any report or publication of this work

* By returning the survey to the researchers or by completing it online you are giving your consent to take part in the survey and for the researchers to compile reports/publications of the results

* The survey should take no more than 15 minutes to complete

1. Is this the first time you have completed this survey?

- Yes
- No

2. How old are you?

- 50-59 years
- 60-69 years
- 70-79 years
- 80+ years

ABOUT YOU AND YOUR TIME IN THE RETIREMENT VILLAGE

3. Are you currently living in a retirement village?

- Yes
- No

4. How long have you lived in a retirement village?

- Less than 1 year
- 1-2 years
- 3-5 years
- 6-9 years
- More than 10 years

5. How many units are there in your retirement village?

6. Why did you decide to move into a retirement village? Tick as many boxes as apply to you

- Downsize while I've could
- Previous home became too big to manage
- Safe environment and emergency support
- Concern about my/our future health
- Village facilities
- Maintenance available on site
- Freedom from house responsibilities to pursue other interests
- 24 hour, 7 day care availability

Other (please specify)

7. How satisfied are you with your life as a whole?

0: Not satisfied to 10: Completely satisfied

1 2 3 4 5 6 7 8 9 10

8. In general would you say your health is:

- Excellent
- Very good
- Good
- Fair
- Poor

9. How satisfied are you with your emotional health?

0: Not satisfied to 10: Completely satisfied

0 1 2 3 4 5 6 7 8 9 10

10. How would you rate your experience of retirement village life?

0: Not satisfied to 10: Completely satisfied

0 1 2 3 4 5 6 7 8 9 10

11. How would you rate your experience of interactions with managers/owners?

0 1 2 3 4 5 6 7 8 9 10

0: Not satisfied to 10: Completely satisfied

12. How likely are you to recommend retirement village living to family, friends or colleagues?

0 1 2 3 4 5 6 7 8 9 10

0: Not at all likely to 10: Extremely likely

REGARDING THE TIME BEFORE YOU MOVED INTO YOUR RETIREMENT VILLAGE:

13. How easy was it to understand your purchase contract?

0 1 2 3 4 5 6 7 8 9 10

0: Difficult to 10: Easy

14. Were there any issues - contractual or otherwise - which needed resolving before you moved into your retirement village?

Yes, move to question 15 & 16

No, move to question 19

15. If yes, what were these issues?

16. Were the issues resolved before you moved in?

Yes, move to question 17

No, move to question 18

17. If yes, how satisfied were you with the outcome(s)?

0 1 2 3 4 5 6 7 8 9 10

0: Extremely dissatisfied to 10: Extremely satisfied

18. If no, how likely is it that the issue(s) will be resolved in the near future?

0 1 2 3 4 5 6 7 8 9 10

0: Extremely unlikely to 10: Extremely likely

SINCE YOU HAVE BEEN IN THE RETIREMENT VILLAGE:

19. Have you ever reported a matter requiring the village manager's attention?

Yes, move to questions 20, 21, 22 & 23

No, move to question 24

20. What was the issue?

21. Has the issue been resolved to your satisfaction?

Yes, move to question 22

No, move to question 23

22. How long did it take before the matter was dealt with to your satisfaction?

23. If the issue was not resolved, how likely is it that the issue(s) will be resolved in the near future?

0 1 2 3 4 5 6 7 8 9 10

0: Extremely unlikely to 10: Extremely likely

24. How available is the village manager when you need to see him/her?

0 1 2 3 4 5 6 7 8 9 10

0: Never available to 10: Always available

25. Have you every needed to contact the village manager's boss, for instance the regional manager or a person higher in the management company regarding an issue that was affecting you?

Yes, Move to question 26

No, Move to question 27

26. If yes, what was the outcome?

27. In your opinion, how long does it take for the manager/owner to make decisions about issues which affect you?

0 1 2 3 4 5 6 7 8 9 10

0: Too much time to 10: Right amount of time

28. Do you know if your village has a dispute resolution process?

Yes

No

29. To your knowledge, does your manager/owner use a dispute resolution process when issues arise?

Yes

No

30. How comfortable do you feel about voicing any concerns you might have to your manager/owner?

0 1 2 3 4 5 6 7 8 9 10

0: Extremely uncomfortable to 10: Extremely comfortable

31. How do you think the management handles disputes or concerns that affect the retirement village?

0 1 2 3 4 5 6 7 8 9 10

0: Not at all well to 10: Extremely well

32. Have you ever experienced a change of ownership of the village or a change of contract whilst you have been in the retirement village?

Yes, move to question 33

No, Move to Question 34

33. Describe any issues arising from this experience

34. Do you think your monthly maintenance charge or service fee represents good value for money?

Yes, move to question 36

No, move to question 35

35. What amount per month do you think represents good value for money?

ONCE YOU LEAVE THE RETIREMENT VILLAGE:

36. Do you understand your contractual obligations on leaving your retirement village (e.g. the exit process, selling your retirement village home etc?)

0 1 2 3 4 5 6 7 8 9 10

0: Do not understand at all to 10: Completely understand

37. Do you understand what the Deferred Management Fee is at your village?

0 1 2 3 4 5 6 7 8 9 10

0: Do not understand at all to 10: Completely understand

38. If you have been involved in disputes and/or would like to provide further anonymous information please provide the information in the text box provided.



Retirement Village Residents' Experiences of Contracts and Outcomes

2. Thank you and exit

Thank you for completing the survey. We appreciate your time and effort.

For information on any aspect of this survey, please contact the project manager at NARI:

Name: Dr Sue Malta
Telephone: 03.8387 2614

If you have any complaints about any aspect of the project, then you may contact:

Name: Ms Jessica Turner
Position: Manager Melbourne Health Human Research Ethics Committee, Project Code: 2015.102
Telephone: 03.9342 7602

If you would like RRVV to assist you in any way, please contact RRVV directly:

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