



WHEATBELT DEVELOPMENT COMMISSION

# AGE FRIENDLY CLUSTER HOUSING BUSINESS CASE DEVELOPMENT GUIDE

A toolkit guiding the development of comprehensive business cases for age friendly cluster housing



## **Aged Housing Alliance Business Case Development Framework Overview**

*The Australian Government recognises that many older Australians want to stay in their own homes as long as they can. By 2050, over 3.5 million Australians will access aged care each year with around 80 per cent of the services delivered in the community.*

Overall, WA non-metropolitan regions have an older population profile than the state as a whole and are consequently further advanced in encountering increasing needs for aged care. Common concerns in regional WA include:

- sparse and geographically dispersed ageing populations;
- aged services under pressure;
- aged and home care workforce issues; and
- significant sustained growth in demands for aged and home care services.

Housing plays a crucial role in the decisions of people to remain living independently. Many older adults are living in houses not suited to “ageing in place” and as such tend to experience a greater number of falls and accidents due to the design of their homes.

Cluster housing involves the development of a number of independent living units (ILUs) that are located central to essential town services including health care and retail. Contemporary age appropriate housing should meet the Platinum level requirements of the Liveable Housing Design Guidelines as well as recognise elements that facilitate to maintain abilities and provide meaningful engagement, accessibility and reduced risks to support a person with dementia.

This approach also supports the clustering of community aged care services to multiple persons in older person’s housing developments leading to the creation of greater efficiencies for community care service provision and minimising the cost and time required for travel when delivering services.

Within the full range of community aged care options, there is significant scope to imagine a future aged care landscape across regional WA where older people are regularly receiving up to and including nursing home levels of support *in* the community.

This document provides Local Governments and other stakeholders a framework for the development of Aged Housing Business Cases, assisting to ensure that thorough planning is completed and all essential elements for a Business Case are considered.

The development of a comprehensive Business Case, not only improves the opportunity to secure funding, it also sets the foundations for effective project management and implementation. Together with the information in this Framework and templates attached in the Appendices, proponents can be better informed and resourced, throughout the Business Case development phase.

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## Templates

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## Aged Housing Alliance Business Case Development Framework

### 1. Formation of an Alliance

#### What is an Alliance?

An Alliance is an agreement between two or more parties with a common interest that agree to pursue agreed objectives for mutual benefit whilst remaining independent organisations. This level of collaboration aims to bring each party greater benefits than those available from individual efforts.

#### An Alliance in the Context of Developing Aged Housing

An Aged Housing Alliance is underpinned by medium and long term planning to deliver appropriate and affordable housing solutions enabling seniors to remain living in their local community. Members of the Alliance will share a common interest in developing age appropriate housing built to universal, age and dementia friendly design standards that facilitates ageing in place.

The formation of an Alliance allows regional local governments to be better resourced to deliver aged housing through the sharing of ideas, financial and in-kind resources, governance and business modelling and facilitating economies of scale.

#### Key Elements in Forming an Alliance

When forming an Alliance it is important to:

- Identify the parties to be included in the Alliance
- Identify partner resources (funding, capital equipment, infrastructure, knowledge, expertise, intellectual property). This will result in a pool of resources which will be more valuable than individual resources
- Ensure all parties share a common interest i.e. regional boundaries, parties complement each other they do not compete against one another
- Identify and develop a vision for the Alliance
- Have the full commitment from all parties
- Be flexible and able to adapt
- Have complete trust internally (Shire and Alliance)
- Have realistic expectations
- Plan, be prepared and be proactive not reactive
- Adopt a suitable name for the Alliance
- Determine how the Alliance will be formalised i.e. Memorandum of Understanding, incorporation or business

#### How to formalise an Alliance?

The most common methods to formalise an Alliance is through the development and signing of a Memorandum of Understanding or by becoming an incorporated body through the Department of Commerce. More information on how to become an incorporated body can be found on the Department of Commerce website: <http://www.commerce.wa.gov.au/consumer-protection/associations-and-clubs>

Incorporation under the *Associations Incorporation Act 1987* provides an affordable and simple way of establishing a legal entity that has the capacity to function in its own right. The Department of Commerce can provide further information on how to become incorporated on 1300 304 074 or visit their website: <http://www.commerce.wa.gov.au/consumer-protection/how-incorporate-association>

Step one is to check the availability of your intended Alliance name with the Department of Commerce.

Furthermore, it is advisable that you seek legal advice or assistance when the Alliance develops the Memorandum of Understanding or establishing rules for the incorporated body through a constitution.

## 2. Stakeholder Identification / Engagement

### What is a Stakeholder?

A stakeholder is a person or group of people who can affect or be affected by a project. Stakeholders can be an internal part of a project’s organisation, or external, such as customers, creditors, or members of a community. Stakeholders can be individuals working on a project, groups of people or organisations. A stakeholder may be actively involved in a project’s work, affected by the project’s outcome, or in a position to affect the project’s success.

### Stakeholder Analysis

By encouraging the right people, in the right way, can make a big difference to the success of your project. Undertaking a Stakeholder Analysis will enable you to identify and manage your stakeholders efficiently. A stakeholder analysis will allow you to:

- Identify your stakeholders
- Engage with your stakeholders, and
- Manage your stakeholders

### Stakeholder Identification

It is important to identify your stakeholders early in the project. This, will allow you to effectively engage with and manage your stakeholders more efficiently. Stakeholders may be internal, external, local, state, national or international individuals or organisations. Your stakeholders may change throughout the duration of the project, for example some of your stakeholders may be present during the planning stage only but not during the project construction stage. See the list below as an example of some of your potential stakeholders.

Your Boss	Shareholders	Government
Senior Executives	Alliance Partners	Trades Associations
Co-workers	Suppliers	Media/Press
Project Management Team	Lenders	Interest Groups
Customers	Analysts	The Public
Prospective Customers	Future recruits	The Community
Service Providers		

When identifying your stakeholders, you also need to identify why they are a stakeholder to be able to establish the level of engagement and management required. Some questions you may ask about your stakeholder:

- Who is the stakeholder and the most relevant contact person?
- What is the nature of their stake in the project?
- What does the stakeholder expect from you?
- What do you expect from the stakeholder?

## Stakeholder Engagement

Stakeholder engagement is the process by which an organisation involves stakeholders who may be affected by the decisions it makes or can influence the implementation of its decisions. Stakeholders may support or oppose the decisions, be influential in the organisation or within the community in which it operates, hold relevant official positions or be affected in the long term.

Your stakeholders will be involved in different ways and different stages throughout the project, so it is important to identify what information will be communicated between you and your stakeholders and how you will communicate the relevant information with each of your stakeholders. The development of a communication plan will assist you in clarifying the details on how to engage with your stakeholders. See *Section 13 - Communication Plan* for more information.

It is also important to maintain a list of your stakeholders. A *Stakeholder Engagement Template* has been included as part of this document. This template may assist you in keeping a detailed list of your stakeholders throughout the duration of your project. The *Stakeholder Engagement Template can be found in appendix 1.*

### **Stakeholder Involvement: Planning Stage**

During the Planning Stage of your project, it is important to involve your Stakeholders as early as possible. This involvement will also assist in the development of your project's business case. The following activities are suggested as a guide to stakeholder involvement throughout the planning stage:

Seek Letters of Support - from various stakeholders (obtain as early as possible)

- Department of Local Government and Communities (project officer)
- Letters of Support from participating Local Governments
- Letters of Support from Regional Councils (if applicable)
- Service Providers (local & regional)
- WA Country Health Service
- Local Residents (prospective customers)
- Local groups and organisation
- Local Members of Parliament (Federal and State)

Conducting Community Consultation

- Community forums / meetings
- Surveys / questionnaires

Conducting Stakeholder Meetings - to establish;

- The nature of their stake in the project
- What the stakeholder expects from you
- What you expect from the stakeholder



## **Stakeholder Involvement: Project Implementation Stage**

Below are examples of how your stakeholders may be involved throughout the Project Implementation Stage:

### Status reports

Status reports are instrumental in keeping your stakeholders informed on the progress of the project. They allow the project manager to ensure milestones are being met and ensure all people involved in the implementation know exactly where the project is at, what has been completed and what is happening next.

### Stakeholder Meetings

Throughout the project you need to manage your stakeholders to ensure that all stakeholders' needs (including yours) and involvement in the project haven't changed. Stakeholder meetings may be held at various times to ensure everyone is happy with their level of involvement in the project. If changes are founded during the stakeholder meetings, the project must have a process to action and implement these changes.

### Project Variation Process and Forms

Although we have the best intentions to plan our project correctly, there may be aspects of the project that need to be varied throughout the implementation stage. Establishing a process to deal with project changes/variations ensures relevant stakeholders are aware that a process must be followed if changes need to be implemented. Not only is this good practice it also keeps the project transparent. A Project Variation Form ensures there is a clear record of the variation and that authorisation from the required stakeholders has been attained. An example of a *Project Change / Variation Form Template* can be found in *appendix 2*.

### Managing your Stakeholders

You have identified your stakeholders, determined their needs, their level of involvement and established how you will interact and communicate with them. Throughout the project you will need to engage your stakeholders to ensure that their needs, their involvement and your needs in the project haven't changed. Setting out how you will manage your Project's Stakeholders will ensure the relationship/s developed between all those involved in the project builds trust, an openness to communicate and the motivation to see the project to completion.

### 3. Project Management and Procurement

Project management is the application of processes, methods, knowledge, skills and experience to achieve the project objectives. Investment in effective project management will have a number of benefits to both the host organisation and the people involved in delivering the project. It will:

- provide a greater likelihood of achieving the desired result
- ensure efficient and best value use of resources
- satisfy the differing needs of the project's stakeholders.

#### Project Management Phases

<i>Initiation</i>	This first stage of a project defines the purpose of the project and the justification for the project, which will be used to ensure the project stays on track. It also states what the project is intended to achieve, how that will be achieved and the scope of the work. In this phase, those involved in the project will be assigned their responsibilities.
<i>Requirements</i>	The requirements documentation describes the aims of the project in detail including timescales and constraints. It should also define the criteria that will constitute a successful project and will be used to manage the expectations of the stakeholders.
<i>Planning</i>	The project plan details how the project work will be carried out (tasks), how it will be monitored and controlled, how communication will be facilitated and information about costs and timescales. All tasks need to be scheduled to ensure tasks with inter dependencies are completed when required and to enable tasks to be performed in parallel. A Gantt Chart is one of the most common project management tools to assist with scheduling.
<i>Execution</i>	The person or group assigned to carry out a task will need to know, in detail, what the task involves as well as any dependencies and timescales, and will also need to understand the criteria by which each task is deemed complete.
<i>Closure</i>	Once there is an approved end product, the project can be formally closed. A final review should be undertaken to learn from both the successes and the mistakes of this project and to take what was learnt to the next project.

#### Project Management Processes

<i>Monitoring</i>	Planning is carried out in the early stages of a project but there should be ongoing monitoring to ensure the project remains on budget and schedule, that resources are available and the expected benefits can be delivered.
<i>Control</i>	No project is without problems but the project manager needs to control them so they do not adversely affect the end result. The control phase also deals with risk management.
<i>Communication</i>	Good communication is one of the most important factors affecting project success. Many problems can be avoided if there is open, honest communication between everyone involved in a project; written and verbal, formal and informal.
<i>People Management</i>	A project manager is responsible for managing the individuals working on the project as well as the tasks and risks. In complex projects there may be segregated levels of people management but every project

manager will have some responsibility for individuals. This includes motivating people, delivering constructive feedback etc.

### Appointing a Project Manager or Project Management Team

A Project Manager or Project Management Team will be responsible for the overall direction, coordination, implementation, execution, control and completion of the project ensuring consistency with the Alliance's strategies, commitments and goals.

The Alliance will need to consider whether it has the necessary skills, knowledge and experience to manage the project or whether an independent Project Manager needs to be contracted to deliver the project on their behalf.

Some of the key tasks and responsibilities of the Project Manager/Project Management Team will be to:

- lead the planning and implementation of project
- facilitate the definition of project scope, goals and deliverables
- define project tasks and resource requirements
- manage project budget
- plan and schedule project timelines
- provide direction and support to project team
- constantly monitor and report on the progress (including problems, solutions, project variations and interventions) of the project to all stakeholders
- project evaluations and assessment of results

Some of the qualifications and experience of a Project Manager/Project Management Team may be:

- qualification in project management or equivalent
- proven experience in people management
- proven experience in strategic planning
- proven experience in risk management
- proven experience in change management
- proficient in project management software

A quality Project Manager/Project Management Team will be competent in:

- critical thinking and problem solving
- planning and organising
- decision-making
- communication
- influencing and leading
- delegation
- team work
- negotiation

- conflict management
- adaptability
- stress tolerance

The newly formed Alliance will need to develop a position description which clearly outlines their expectations of a Project Manager or Project Management Team. Once a clear position description has been developed, the position will need to be advertised and the Alliance will need to appoint the Project Manager or Project Management Team. For Western Australian Local Government, the Western Australia Local Government Association's Work Place Solutions arm provides HR support to member Councils in the development of position descriptions if required. The Project Manager position can be advertised in local media, social media platforms and webpages within your region and on sites such as:

Heartlands WA [www.heartlandswa.com.au](http://www.heartlandswa.com.au)

Seek [www.seek.com](http://www.seek.com)

Indeed [www.indeed.com](http://www.indeed.com)

Jobs WA [www.jobs.wa.gov.au](http://www.jobs.wa.gov.au)

Career One [www.careerone.com.au](http://www.careerone.com.au)

Job Search [www.jobsearch.gov.au](http://www.jobsearch.gov.au)

### Project Management Tools

A range of information and tools to assist with project management can be found on the Mind Tools webpage: [https://www.mindtools.com/pages/main/newMN\\_PPM.htm](https://www.mindtools.com/pages/main/newMN_PPM.htm)

**Gantt charts** are excellent models for scheduling and budgeting. They are also useful for reporting, presenting and communicating project plans and progress easily and quickly. Gantt Chart templates in Microsoft Excel or Power Point can be downloaded online at:

<https://www.officetimeline.com/gantt-chart-excel> or you can watch the tutorials on how to custom make your own Gantt Chart.

Free and paid online project management programs are also available including but not limited to Podio <https://podio.com/> and Wrike <https://www.wrike.com/>. These programs can assist to clearly define roles and customise tools to fit your team helping to improve delivery time, effectiveness and relationships. Conversations and document sharing can be held within the platforms. Apps are also available meaning accessibility on your portable device/smartphone is easy and readily available.

**Procurement** is acquiring, buying goods, services or works from an external source. It is important that the goods, services or works that are procured are done so with integrity, meet the needs (quality and quantity), delivered in a timely manner and are value for money.

The strategy that is developed should take into consideration the various procurement principles, primarily, economy and efficiency. Consideration needs to always be given to whatever savings (or economies of scale) can be achieved by strategically planning how procurements will be carried out over the period covered by the procurement plan.

Within the business case it is essential to cover:

#### 1) The Procurement Strategy

- a. Who will oversee project procurement?
- b. Are you governed by any policies/acts?
  - i. Local Governments will need to undertake procurement within the provisions of the Local Government Act (1995) and the Local Government Act (Functions and General) Regulations (1996)

ii. Local/Corporate/NFP Purchasing and Tender Policies (see *Section 12 – Purchasing Policy*)

2) Ethics and Integrity

- a. Honesty and professionalism
- b. Potential suppliers treated impartially, honestly and consistently
- c. Processes to be put in place to ensure decisions are made transparently, free from bias and fully documented
- d. Conflicts of interest identification process and record management
- e. Confidentiality

3) Value for Money

- a. Consideration to user requirements, quality standards and compliance
- b. Capacity to supply without risk of default
- c. Sufficient number of quotations obtained

4) Sustainable Procurement

- a. Consideration to environmental and social impacts
- b. Sustainable resource materials, waste minimisation and best practice energy and water efficiency methods

5) Local Purchasing

- a. Guided by the principles outlined in *Section 12 – Purchasing Policy*
- b. Opportunities for local suppliers

#### 4. Housing Needs Analysis

The Alliance will need to seek a comprehensive Aged Housing Needs Analysis to identify the key gaps and priorities in aged housing across the Alliance.

The Housing Needs Analysis will provide an overview of the current aged housing stock (including the activities of any aged housing organisations active in the Alliance). It will provide a summary of community feedback as to the design, cost and ownership models that would be appropriate, as well as setting out a ten year staged housing development plan that targets areas of significant need as a priority.

The Alliance will need to determine if internal capacity is available to complete the analysis in-house or whether a consultant will be required to be appointed. The Project Manager will utilise resources within the Region to assist in gathering the appropriate information that can then be used to develop a comprehensive analysis.

#### Housing Needs Analysis Requirements

Element
<p><u>Audit of current Aged-Specific Housing Stock for each Local Government summarised into a matrix</u></p> <ul style="list-style-type: none"> <li>Including number of houses, year built, configuration, current ownership model, location, market value (including current rental value) and overview of age friendliness (Liveable Housing Australia provides a guide to the level of housing age friendliness. At a minimum housing must meet the Silver level in Liveable Housing Design to be considered age friendly). The guide can be download from the Liveable Housing Australia website: <a href="http://livablehousingaustralia.org.au/library/SLLHA_GuidelinesJuly2015-3.pdf">http://livablehousingaustralia.org.au/library/SLLHA_GuidelinesJuly2015-3.pdf</a> (refer to page 13).</li> </ul> <p>Note: Local Governments should be able to provide this information.</p>
<p><u>Overview of any Aged Housing Organisations active in each Local Government</u></p> <ul style="list-style-type: none"> <li>Overview of history and current operations and responsibilities</li> <li>Overview of assets owned</li> <li>Governance Model</li> <li>Business Model</li> <li>Reliance on volunteers</li> <li>Capacity/willingness to expand operations (locally)</li> <li>Capacity/willingness to expand operations (sub-regionally)</li> <li>Capacity to improve economic outcomes of community (through employment opportunities, income generated from houses for further investment)</li> <li>Interest in partnering with Shire to deliver more aged care houses</li> </ul> <p>Note: Local Governments should be able to provide this information.</p>
<p><u>Current waiting list numbers for Aged-Specific Housing Stock for each Local Government</u></p> <ul style="list-style-type: none"> <li>Average wait times</li> <li>Ratio of local people on wait list</li> <li>Do people usually move into houses as soon as one is available?</li> <li>If houses are vacant – include why?</li> </ul>

### Housing Demand Estimates for each Local Government

- Present
- Present + 5 years
- Present + 10 years

This information will need to be researched and compiled by the person/consultant undertaking the analysis.

### Community Consultation

You will need to undertake community consultation to identify the desire for:

- Cluster Housing Precinct concept
- Housing configuration
- Access to garden/alfresco/other
- Ownership models
- Housing value (willingness to pay)
- Building materials (brick/modular)
- Environmentally sensitive design

### A synopsis of the current broad Housing Market for each Local Government

Potential impact statement of how building new dwellings could impact existing residential house value/market. This information will need to be researched and compiled by the person/consultant undertaking the analysis.

### An Overview of the Aged Housing Needs for each Local Government

Including number, configuration, age and dementia friendly design requirements and ownership model configuration. This information will need to be researched and compiled by the person/consultant undertaking the analysis.

### 10 Year Staged Housing Development Plan for the Alliance

Based on targeting areas of significant need as a priority. This information will need to be researched and compiled by the person/consultant undertaking the analysis.

The *Housing Needs Analysis Template* can be found in *appendix 3*. This template will assist each of the local governments within the Alliance to complete their own Housing Needs Analysis.

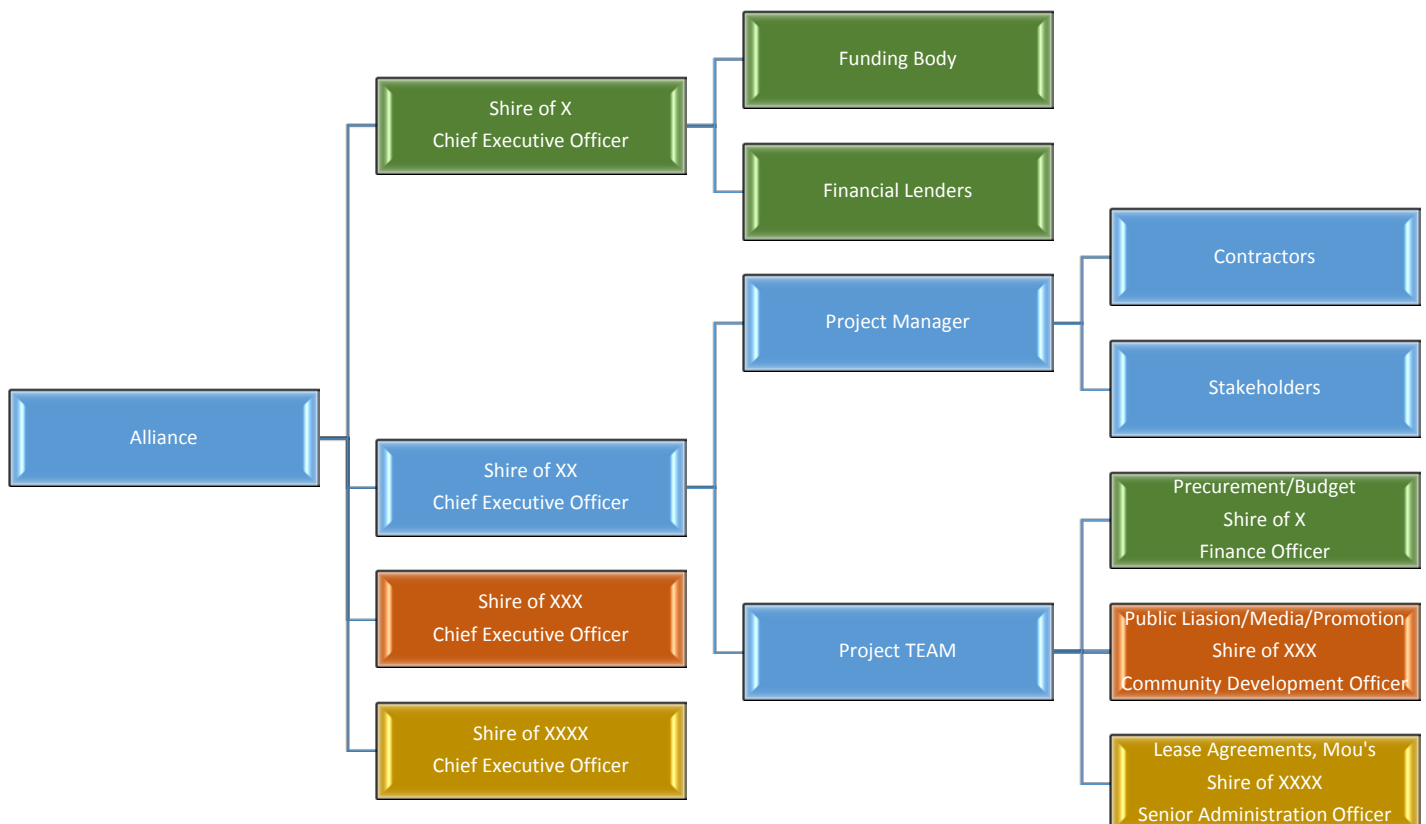
## 5. Governance

Project governance is the management framework within which project decisions are made. You will need to establish a governance framework and communication plan (see *Section 13 – Communication Plan*), which will ensure good project management and strengthen the Alliances role. This governance framework is for the duration of the project only. Once the project is completed, you will then need to transition the Alliance to the operational governance and ownership models found in *Section 18 – Operational Governance*.

In establishing a governance structure, the following key roles should be considered:

- Oversight Committee/Alliance - decides on the priorities and strategic direction of a project and manages the general course of its operations.
- Nominated contact for the funding body – manages communications with funding body including ensuring relevant reporting is completed and that the funding body is updated on any project variations.
- Project Manager – responsible for planning, procurement and execution of the project.
- Project Team - a group of people who usually belong to different groups, have specific functions and are assigned to activities for the same project. A team can be divided into sub-teams according to need. Usually project teams are only used for a defined period of time and disbanded after the project is deemed complete.

Below is a basic example of what a project Governance Framework Structure could look like.





## 6. Cost Benefit Analysis

A cost benefit analysis is used to evaluate the total anticipated cost of the project compared to the total expected benefits (monetary or otherwise). A cost-benefit analysis is an important tool for Government, particularly when establishing priorities for funding allocations.

Generally, a cost-benefit analysis has three parts. First, all potential costs that will be incurred by implementing a proposed action must be identified. Secondly, the anticipated benefits associated with the potential action need to be determined. And finally, subtract all identified costs from the expected benefits to determine whether the positive benefits outweigh the negative costs.

The project will have both direct and indirect economic benefits that the Alliance need to consider. The direct economic benefit for the Alliance includes income generated from rental of the accommodation. As part of this, you will need to determine how the generated revenue will be expended (e.g. maintenance, future builds) and how these funds will provide greater flow-on benefits.

Indirect economic benefits may also be experienced in the respective communities through the creation of jobs in the service and support industries. It may also produce economic benefits to the community through expenditure on foods and consumables purchased locally. Maintaining population numbers in the region will provide broader economic benefits by supporting industries that are population driven such as the services and retail sector and other community activities (i.e. volunteering, club membership).

You will need to provide a summary of all the economic impacts resulting from the delivery of the aged person housing project. Other factors you may consider when developing these impacts are:

- Economic return for State and Federal economies
- Broader benefits to both the aged care and health systems (reduced burden)
- How the project aligns economically with other State, Federal and Local Policies
  - Wheatbelt Blueprint
  - Wheatbelt and Sub Regional Economic Strategies
  - Wheatbelt Aged Support and Care Solutions Report
  - Wheatbelt Regional Plan 2013-2018
  - State Planning Strategy

You will also need to identify various options for the delivery of their project, including identifying options if funding is not approved. What are the possible impacts that this may have on the future of the project? What other alternatives have the Alliance considered to be able to successfully deliver the project? Further options you may explore are:

- Attracting third party capital investment
- Maintaining status quo
- Seeking commercial loans
- Downsizing the project to be more affordable for local government.

By developing a comprehensive cost-benefit analysis, you will be further equipped to prove the value of investing in aged housing, both from a social and economic perspective.

## 7. Risk Analysis

Risk analysis is a technique used to identify and assess factors that may jeopardise the success of a project or achieving a goal. This technique also helps to define preventative measures to reduce the probability of these factors from occurring and identify countermeasures to successfully deal with these constraints when they develop to avert possible negative effects on the Alliance and the project.

To perform a risk analysis on a project, the Alliance needs to identify any risks involved including financial, legislative, compliance, personnel, political and community as well as any physical risks.

It may be useful to separate the risk analysis into construction risk and operation risk to ensure consideration of the ongoing operational risks beyond the construction phase of the project.

The ultimate goal of a qualitative risk analysis is to rate risks for their likelihood of occurring (probability) and the consequence/s (impact) they may have on the overall project objectives if realised. Each risk is assigned a rating according to the severity of their potential likelihood and consequence. Use the Risk Rating Table below to assist you to rate the risks you've identified for your project.

### Risk Rating Table

#### Likelihood

Level	Descriptor	Example
5	Almost certain	100% chance of this happening
4	Likely	Most probable that it will occur
3	Moderate	Reasonable to consider that it could occur
2	Unlikely	Slight possibility of it occurring
1	Rare	1 in 100 chance of it occurring

#### Consequences

Level	Descriptor	Example
1	Insignificant	Impact would be inconsequential
2	Minor	Some impact would be noticeable
3	Moderate	Manageable scale of impact
4	Major	Large Scale of impact
5	Catastrophic	Extreme scale of impact

Use the Likelihood and Consequence Matrix below to determine the Risk Rating.

### Likelihood and Consequence Matrix

<b>Likelihood</b>	5 <i>Almost Certain</i>	6	7	8	9	10
	4 <i>Likely</i>	5	6	7	8	9
	3 <i>Moderate</i>	4	5	6	7	8
	2 <i>Unlikely</i>	3	4	5	6	7
	1 <i>Rare</i>	2	3	4	5	6
	<i>Rating</i>	1 <i>Insignificant</i>	2 <i>Minor</i>	3 <i>Moderate</i>	4 <i>Major</i>	5 <i>Catastrophic</i>
<b>Consequence</b>						

### Risk Rating Definitions

<b>High</b>	<b>8-10</b>	
<b>Significant</b>	<b>7</b>	
<b>Medium</b>	<b>6</b>	
<b>Low</b>	<b>2-5</b>	

The *Risk Analysis Template* can be found in *appendix 4*.

You will need to perform the initial risk assessment before identifying any actions that could be applied to minimise the likelihood or consequence for each of the identified risks. The next step is to identify the actions to avert the identified risk and insert action under the 'Risk Response' column in appendix 4. The final step is to perform another risk assessment on the identified action to determine whether the risk has been minimised by the desired actions.

## 8. Local Planning Policies / Zoning

The Western Australian planning system is regulated on three levels;

- Minister for Planning
- Western Australia Planning Commission (WAPC), and
- Local Government

Local governments are responsible for planning their local communities by ensuring appropriate planning controls exist for land use and development. They do this by preparing and administering local planning schemes and strategies.

**Local planning schemes** set out the way land is to be used and developed, classify areas for land use (zones) and include provisions to coordinate infrastructure and development in a locality. Further information can be obtained via <http://www.planning.wa.gov.au/Local-planning-schemes.asp>

**Local planning strategies** set out the long-term planning directions for the local government, apply State and regional planning policies, and provide the rationale for the zones and other provisions of the local planning scheme. Further information can be obtained via <http://www.planning.wa.gov.au/Local-planning-strategies.asp>

Statutory mechanisms that direct Local Government planning procedures include:

- State Planning Framework
- Regional Planning Schemes
- Planning and Development Act 2005
- Environmental Protection Act 1986
- Town Planning Regulations 1967

Local Government Authorities will also have Local Planning Policies included within their Policy and Procedure Manuals. Planning Policies and Procedures are used to guide town planning and encourage Local Government Authorities to make consistent decisions on planning applications. Check with your Local Government Authority for a copy of their Local Planning Policies and Procedures which will outline the process for Planning Applications and Approvals you will be required to complete and have in place prior to commencement of construction.

It is essential to consult Local Government Town Planning Schemes and speak with Building Surveyor / Environmental Officers when completing the site identification process.

### **Bushfire Attack Level Planning Assessment**

There are six Bushfire Attack Level (BAL) categories, as set out in Australian Standard 3959: Construction of buildings in bushfire-prone areas (AS 3959).

If you are proposing to build or develop in a bushfire prone area as designated on the [Map of Bush Fire Prone Areas](#), then you may be required to undertake a BAL assessment before you can commence development.

A BAL assessment is generally carried out by an accredited Level 1 BAL Assessor or Bushfire Planning Practitioner. You can find a list of accredited Level 1 BAL Assessors at the Fire Protection Association [\(FPA\) Australia's website](#).

The State Government has announced a package of reforms to help protect lives and property against the threat of bushfires throughout Western Australia. These reforms introduce new requirements for people intending to develop and/or build in bushfire prone areas, including the need to assess a property's bushfire risk and take additional construction measures to limit the impact of bushfires.

The bushfire planning reforms only apply to new buildings and development. They are not retrospective so will not affect existing buildings or approved development.

These below website links will help the Alliance understand how these changes may affect any developments being considered. They provide important information on the land use planning requirements if you are planning to develop in a designated bushfire prone area within Western Australia.

The Map of Bush Fire Prone Areas identifies land falling within, or partially within, a bush fire prone area of Western Australia as designated by the Fire and Emergency Services (FES) Commissioner.

The Map of Bush Fire Prone Areas 2016 is available by [clicking here](https://www.dfes.wa.gov.au/regulationandcompliance/bushfireproneareas/Pages/default.aspx).  
<https://www.dfes.wa.gov.au/regulationandcompliance/bushfireproneareas/Pages/default.aspx>



*Image Source: Department of Fire and Emergency Services*

Additional planning and building requirements may apply to developments within designated bush fire prone areas, in accordance with Schedule 2 Part 10A of the *Planning and Development (Local Planning Schemes) Regulations 2015*, State Planning Policy 3.7 Planning in Bushfire Prone Areas, the supporting Guidelines for Planning in Bushfire Prone Areas and the Building Code of Australia. Certain exemptions and exclusions may apply. For specific requirements and for more information:

- Refer to the [Department of Planning website](https://www.planning.wa.gov.au), or contact the Bushfire Policy Officer at [bushfire@planning.wa.gov.au](mailto:bushfire@planning.wa.gov.au) or on (08) 6551 9000.
- Refer to the [Department of Commerce - Building Commission website](https://www.commerce.wa.gov.au) or contact [BCinfo@commerce.wa.gov.au](mailto:BCinfo@commerce.wa.gov.au) or 1300 489 099, or;
- Contact the planning or building section of your local government.

Building in bushfire prone areas will have additional budget implications to be considered by the Alliance. A list of Frequently asked questions can be found at;  
<http://www.planning.wa.gov.au/8193.asp>

## 9. Site Identification and Land Assembly

It is important for Local Governments within the Alliance to choose the most appropriate and practical site for their Aged Housing Development. Identification of all the possible sites before making a decision will ensure the best site is selected. Shires need to compile a list of all possible vacant land within their town site(s) for consideration. This includes land not owned by Council.

After the sites have been identified, the local government will need to establish some guidelines to determine the best possible location. These guidelines may include:

- A minimum and a maximum block size (site area in square meters)
- Capacity for the number of dwellings
- Services (what services exist at the site)
- Ownership
- Zoning and planning restrictions
- Access to medical and other local services and conveniences
- Community preferences
- Access to existing infrastructure (footpaths, seating, bus stops)
- Proximity to existing Aged Care Housing
- Land Assembly

The *Site Identification Template* provided in *appendix 5* will assist you to collate relevant information relating to selected sites and assist in obtaining servicing prices from providers (see *Section 10 – Servicing (Water, Electricity, Telecommunications, Waste Water/Sewerage)*).

Councils will also need to consider the number of houses (cluster housing concept), housing design and site design when selecting a site. Cluster housing is seen to be a favourable approach to aged housing developments as it leads to greater efficiencies for community care service provision (minimising the cost and time required for travel when delivering services) and reduces instances of social isolation that might otherwise be experienced by aged persons. When selecting a site, it is also recommended that local governments consider future aged housing developments. With the ageing population in the Wheatbelt increasing, Council should consider their potential needs in expanding or creating more aged person housing in future years. For example, they may identify that the current need is four Independent Living Aged Care Units but in 10 years' time, the need may increase requiring a further four units to meet the demand.

Information determined through the *Housing Needs Analysis* process will identify the current and future housing need and will assist in the site selection process.

After considering some of these factors the local government may determine the need for joining contiguous lots to make one larger parcel of developable land. Contiguous parcels in an urban area are often too small to build anything more than one house. This type of assembly requires the following three steps and can be a lengthy process:

- Stage 1: Site Identification
- Stage 2: Site Acquisition
- Stage 3: Approval Implementation

Final assembly of the land includes connection of services including power, water, telecommunications and sewerage. The connection of the services will ensure that the land is construction ready. The availability and land assembly requirements of identified sites will impact the decision making process within *Section 22 – Prioritisation of Sites and Planning Construction*.

### Shire Profile and Map

It is recommended that the identified sites for current and future aged housing development are depicted in an attachment to the business case that will further profile:

- Each local government
  - Location, population total
  - Age percentage breakdown
  - Housing type percentages (78% of dwelling have more than 3 bedrooms)
- Current number of senior housing/units
- Proposed site information
  - Lot number
  - Street number
  - Combined size (sqm)
  - Capacity (number of dwellings)
  - Current services
  - Proximity to existing services, infrastructure and shopping precincts
- Map – include a map that clearly identifies the proposed site (include other facilities and services on the map such as hospitals, other aged person accommodation, post office, banks, recreation facilities, train/bus stations, Shire Office, library, fuel, convenience stores and other places of relevance)

Housing and aged person demographics statistics can be sourced from:

- the Australian Bureau of Statistics webpage: <http://www.abs.gov.au/>
- The Australian Department of Health webpage: <https://agedcare.health.gov.au>

## 10. Servicing (Water, Electricity, Telecommunications, Waste Water/Sewerage)

When considering a site for the proposed project, existing services (water, electricity, telephone, waste water/sewerage) will have been identified utilising the *Site Identification Template* provided in *appendix 5*. If the services are already available, connection to a new building is a relatively straight forward process. Acquiring each of the services requires dealing with a variety of organisations, each with their own processes. A brief outline of the process for each of the services can be found below.

To determine the current level of service or the service you require to develop the site, contact the relevant service provider:

Service	Organisation	Contact Details	Information to assist your enquiry
Water	Water Corporation	Phone: 13 13 95 Email: <a href="mailto:building.services@watercorporation.com.au">building.services@watercorporation.com.au</a> Webpage: <a href="http://www.watercorporation.com.au">www.watercorporation.com.au</a>	Street Address- have both the street number and lot number.  If there are existing services at the site, try and get a meter number or account number from a previous bill.
Electricity	Western Power	Phone 13 10 87 Email: <a href="mailto:enquiry@westernpower.com.au">enquiry@westernpower.com.au</a> Webpage: <a href="http://www.westernpower.com.au">www.westernpower.com.au</a>	If you are an existing customer, have your customer reference number available (this will be on any current bills with the service provider).
Telephone	Telstra	Phone: 1800 676 642	
Waste Water / Sewerage	Local Council	Search your Local Government Authority's contact details on the Department of Local Government and Communities webpage <a href="https://www.dlgc.wa.gov.au/AdviceSupport/Pages/Local%20Government%20Directory.aspx">https://www.dlgc.wa.gov.au/AdviceSupport/Pages/Local%20Government%20Directory.aspx</a>	Make sure an authorised person within the organisation makes contact with the service provider otherwise they may not be able assist with any requests.

**Note** - each of the following processes must be completed prior to the commencement of the construction of buildings.

### Water

Before commencement of building, an application to Water Corporation for their approval will be required to be submitted, including your architectural floor plans and site plans. Presuming the water is already available at the selected site, this process is relatively straight forward. There are several ways to submit the application and forms to Water Corporation including online, post, email and fax. You can use the online self-service system BuilderNet to lodge your building application. Simply login to BuilderNet, complete the appropriate application form and attach electronic copies of your architectural floor plans and site plans and any other documents relevant to your application. BuilderNet has been set up to allow builders and developers to lodge building applications and get quotes from Water Corporation for the following services:

- Minor plans for non-habitable structures – swimming pools, patios and garages
- Alterations or additions to existing buildings – renovations or extensions
- Multi-residential or commercial developments, including associated water service connections and sewer junctions



You can login instantly as a guest or register if you will be using BuilderNet regularly at the BuilderNet webpage:

<https://buildernet.watercorporation.com.au/bn/login/logon.jsp?TYPE=33554433&REALMOID=06-abf0796f-e658-42c4-b204-23c3fcb1f09b&GUID=&SMAUTHREASON=0&METHOD=GET&SMAGENTNAME=-SM-FrGA7Em3UABTjAM7qH9JDX%2bWFhCkCAnPiizfCYtEOVJkDSV%2fMSMg9%2bFhNJeClmUe&TARGET=-SMhttps%3a%2f%2fbuildernet%2ewatercorporation%2ecom%2eau%2f%2fbn%2f>

Alternatively, application forms can be downloaded from the Water Corporation webpage. Completed application and supporting documents can be sent via post, email or fax. You will find all the relevant information and forms available on the Water Corporation webpage at: <http://www.watercorporation.com.au/home/builders-and-developers>

### Land Planning Services

The information featured on Water Corporations Land Planning page will assist land developers, planners and State and Local Governments to find out about existing and planned water and wastewater service capacity and location to meet the needs of expanding communities. You will find this information at: <http://www.watercorporation.com.au/home/builders-and-developers/land-planning>

Contact Information:

Building Services	13 13 95	<a href="mailto:building.services@watercorporation.com.au">building.services@watercorporation.com.au</a>
Development Services	(08) 9420 2099	<a href="mailto:land.servicing@watercorporation.com.au">land.servicing@watercorporation.com.au</a>

### **Electricity**

Western Power is responsible for the connection of new buildings or properties to the electricity network. All new connections to the Western Power network will be served by underground power, regardless of whether there is overhead or underground network in your area. To apply for a new residential connection through Western Power, a standard supply needs to be installed on your property. The electricity supply will be connected to a pillar or 'green dome' located on the front boundary close to the neighboring fence line. One pillar is shared between two properties unless there is more than one dwelling on the property.

#### *How to apply*

For standard connections (one to three dwellings), complete the online domestic underground supply application form:

<https://services.westernpower.com.au/online/edus/do/Home>

For strata developments, unusually large homes, or those running heavy-duty or three-phase equipment, you will need to consult an electrical contractor to determine your power needs and to complete the single residential new supply form:

<http://www.westernpower.com.au/customer-service-single-residential-new-supply.html>

For more information and online application forms visit the Western Power webpage: <http://www.westernpower.com.au/customer-service-residential-connections-and-power-upgrades.html>

### *What happens next?*

- Step 1: You will need to set up an account with an electricity retailer i.e. Synergy
- Step 2: Provide the account number (provided by Western Power following your application submission) to the builder or electrical contractor who will arrange the connection (see step 4)
- Step 3: Western Power will install a pillar inside or adjacent to your property boundary connected via an underground cable to the nearest power line
- Step 4: It is then your responsibility to arrange for your builder or electrical contractor to install an underground consumer main cable between the pillar and the meter box/premises

### Solar Power

Western Power is responsible for approving the connection of new embedded generation systems to the Western Power Network. A system can only be connected once all of the applicable connection eligibility criteria have been met.

An embedded generation system (and the most common of the embedded generation systems), converts solar energy into electricity. When an embedded generation system is connected, it has the potential to increase the amount of power flowing into the network. To ensure power quality, reliability of supply and prevent a network capacity overload, Western Power must be advised of, and approve the connection of all embedded generation systems.

In some areas, the connection of new embedded generation systems is subject to Western Power completing network upgrades or installing new infrastructure to ensure the network capacity is large enough to service community and business demand. The approval process to connect your embedded generation system to the network depends on the size of your system and the capacity of the network in the suburb or region where it will be installed.

### Telephone

Cabling of Multi-Building Residential Developments document provides property developers an outline of Telstra's requirements for the provision of telecommunications cabling within multi-building, multi-tenant premises to enable the supply of telecommunications services to the occupants. It applies to private property residential developments such as villas, town houses and retirement villages. This document may be downloaded from the Telstra Smart Community® web site [www.telstra.com.au/smartcommunity](http://www.telstra.com.au/smartcommunity) (look under "Builders"). This webpage will provide you with the information and forms you will need to complete. Alternatively, contact Telstra directly to clarify what you would like to achieve.

### Waste Water/Sewerage

Your local Environmental Health Officer (EHO) will be able to outline all the waste water and sewerage requirements for your site. Contact your local Council office to find out who will be the most appropriate person to talk to about this. The local EHO should be familiar with both the national regulations as well as any local regulations that may be in place.

### Temporary water and electricity supplies for building

Construction does require water and electricity prior to commencing a job. Certain tasks, including mixing concrete and the use of electric power tools rely on water and electricity and are essential to the construction process. Likewise, site amenities for builders and contractors like toilet services and drinking water also depend on having a supply of water.

Builders will generally organise distribution of these temporary services when the site is being prepared. Builders will apply for temporary construction water from the local water supplier, which will be connected at the front of the block. This kind of temporary connection normally comes with some restrictions (e.g. the water shouldn't be used to water plants). Temporary electrical service will also be connected prior to construction beginning. Again, this is generally the responsibility of the builder.

## 11. Identification of any significant Aboriginal Heritage Sites / Aboriginal Participation

### Aboriginal Heritage Sites

Aboriginal sites are an important part of the heritage of the whole community. They are of immense cultural, scientific, educational and historic interest. Aboriginal heritage sites provide Aboriginal people today with an important link to their present and past culture. Destruction, damage or alteration (impact) to an Aboriginal Site without the prior consent of the Minister for Aboriginal Affairs (Minister) is an offence under section 17 of the Aboriginal Heritage Act 1972 (Act).

More information can be found on the Department of Premier and Cabinets website:  
[http://www.slp.wa.gov.au/legislation/statutes.nsf/main\\_mrtitle\\_3\\_homepage.html](http://www.slp.wa.gov.au/legislation/statutes.nsf/main_mrtitle_3_homepage.html).

Identified land status information can be sought from the Department of Aboriginal Affairs (DAA) by emailing [heritageenquiries@daa.wa.gov.au](mailto:heritageenquiries@daa.wa.gov.au) or phoning (08) 6551 7950.

Access to information that the Department of Aboriginal Affairs (DAA) holds in relation to registered Aboriginal Sites and other heritage places is available:

#### Online

- The Aboriginal Heritage Inquiry System (AHIS) which is an internet based search tool <http://maps.dia.wa.gov.au/AHIS2/>. Refer to the AHIS Getting Started: <http://www.daa.wa.gov.au/globalassets/pdf-files/heritage-pdfs/ahisgettingstarted.pdf> and AHIS User Guide <http://www.daa.wa.gov.au/globalassets/pdf-files/heritage-pdfs/ahisuserguide.pdf> for tips to assist you.

Anyone is able to look up information on this system. Note that the AHIS is unavailable from 7-7.30pm daily, and may also be unavailable on Saturday mornings due to scheduled website maintenance (Western Standard Time).

- Spatial information can be downloaded from:  
<http://www.daa.wa.gov.au/heritage/place-search/download-spatial-information/>

You will need to apply for a Licensing Agreement for the Transfer and Use of Digital Information at: <http://downloads.daa.wa.gov.au/placedownload/>

#### In-person

- Appointments can be made to view hardcopy files and reports at DAA's office at 151 Royal St, East Perth by emailing [heritageenquiries@daa.wa.gov.au](mailto:heritageenquiries@daa.wa.gov.au) or phoning (08) 6551 7950.

#### Electronically

- Email or USB: To access the Department of Aboriginal Affairs' site files and heritage survey reports electronically please complete a DAA Site File Access Request Form at <http://www.daa.wa.gov.au/globalassets/pdf-files/heritage-pdfs/daa-site-file-access-request-form-2.docx> and email it to [heritageenquiries@daa.wa.gov.au](mailto:heritageenquiries@daa.wa.gov.au).

The Government's Due Diligence Guidelines assist land users to understand their obligations under the Act and inform their risk-management decisions. Individual developers are encouraged to consult with the DAA to determine whether their proposed development is one where Aboriginal heritage is known to exist and to ascertain whether approvals may be

required under the Aboriginal Heritage Act 1972. The Due Diligence Guidelines can be found at <http://www.daa.wa.gov.au/globalassets/pdf-files/ddg>.

*This information has been taken from the Department of Aboriginal Affairs (DAA) webpage.*

### **Aboriginal Participation**

It is important within the planning process that you summarise any aboriginal participation they intend to engage in throughout the delivery of the Aged Housing Project. This may be by providing job-creating activities targeted at Aboriginal workforce participation within the project. It may also be by promoting any anti-discriminatory policies adopted by the Alliance to ensure equal and fair opportunities for all members of the community. There may already be aboriginal participation from current project partners or employees that could be included in the summary.

## 12. Purchasing Policy

Each of the Local Governments involved in the Alliance will already have their own purchasing policies in place which may differ slightly, therefore you may need to develop a purchasing policy that will best cover the Alliance's needs and requirements of the project. Alternatively, the Alliance may agree that for the purposes of the project, one of the existing local government policies will apply.

The purpose of a purchasing policy is to:

- To ensure best practice policies and procedures are followed in relation to purchasing
- To ensure compliance with the *Local Government Act 1995* ("the Act") and the *Local Government Act (Functions and General) Regulations 1996* ("the Regulations")
- To ensure compliance with the *State Records Act 2000* and associated records management practices and procedures of the Local Government/Alliance
- To undertake purchasing processes that ensures value for money for the Local Government by delivering the most advantageous outcome possible
- To ensure openness, transparency, fairness and equity through the purchasing process to all potential suppliers
- To ensure efficient and consistent purchasing processes are implemented and maintained across the organisation
- To provide opportunities for local services / businesses

You will need to ensure that the Purchasing Policy is consistent with the intent of the purchasing policy of the intended funding body, for example the State Government's, WA Buy Local and Building Local Industry policies.

The Western Australia Local Government Association (WALGA) recommends that the following ethics and integrity are addressed within a purchasing policy:

### Code of Conduct

All officers and employees of the Local Government undertaking purchasing activities must have regard for the Code of Conduct requirements and shall observe the highest standards of ethics and integrity. All officers and employees of the Local Government must act in an honest and professional manner at all times which supports the standing of the Local Government.

### Purchasing Principles

The following principles, standards and behaviours must be observed and enforced through all stages of the purchasing process to ensure the fair and equitable treatment of all parties:

- full accountability shall be taken for all purchasing decisions and the efficient, effective and proper expenditure of public monies based on achieving value for money;
- all purchasing practices shall comply with relevant legislation, regulations, and requirements consistent with the Local Government policies and Code of Conduct;
- purchasing is to be undertaken on a competitive basis where all potential suppliers are treated impartially, honestly and consistently;

- all processes, evaluations and decisions shall be transparent, free from bias and fully documented in accordance with applicable policies, audit requirements and relevant legislation;
- any actual or perceived conflicts of interest are to be identified, disclosed and appropriately managed; and
- any information provided to the Local Government by a supplier shall be treated as commercial-in-confidence and should not be released unless authorised by the supplier or relevant legislation.

### Value for Money

Value for money is an overarching principle governing purchasing which allows the best possible outcome to be achieved for the Local Government. It is important to note that compliance with the purchasing specification is more important than obtaining the lowest price, particularly taking into account user requirements, quality standards, sustainability, life cycle costing and service benchmarks.

An assessment of the best value for money outcome for any purchasing process should consider:

- all relevant Total Costs of Ownership (TCO) and benefits including transaction costs associated with acquisition, delivery, distribution, as well as other costs such as but not limited to holding costs, consumables, deployment, maintenance and disposal;
- the technical merits of the goods or services being offered in terms of compliance with specifications, contractual terms and conditions and any relevant methods of assuring quality, including but not limited to an assessment of levels and currency of compliances, value adds offered, warranties, guarantees, repair and replacement policies, ease of inspection, ease of after sales service, ease of communications etc.;
- financial viability and capacity to supply without risk of default (competency of the prospective suppliers in terms of managerial and technical capabilities and compliance history); and
- a strong element of competition in the allocation of orders or the awarding of contracts. This is achieved by obtaining a sufficient number of competitive quotations wherever practicable.

### Purchasing Thresholds and Processes

#### ***Legislative / Regulatory Requirements***

All purchasing by the Local Government will be in accordance with the *Local Government (Functions and General) Regulations 1996*. Purchasing that exceeds \$100,000 in total value (excluding GST) shall be put to public tender unless a regulatory tender exemption is utilised by the Local Government.

Below is the purchasing process that WALGA recommends to be followed based on the actual or expected value of each purchase by the Local Government/Alliance:

Purchasing Thresholds (ex GST)	Requirements
Up to \$1,000	Direct purchase from suppliers requiring at least two (2) verbal or written quotations supported by evidence of the quotation (e.g. email, fax or record of quotation) in each instance. All quotations from suppliers should be in writing.
\$1,000 - \$39,999	Obtain at least three (3) written quotations (email, fax or original copy).
\$40,000 - \$99,999	Obtain at least three (3) written quotations (email, fax or original copy) containing price and specification of goods and services. The procurement decision is to be based on all value for money considerations in accordance with the definition stated within this policy.  <i>The <a href="#">WALGA Procurement Handbook</a> has a model Request for Quotation Template which provides best practice documentation for the Request for Quotation process and will assist with recording details.</i> <a href="http://walga.asn.au/Subscription-Services/Procurement/Procurement-Services.aspx">http://walga.asn.au/Subscription-Services/Procurement/Procurement-Services.aspx</a>
\$100,000 and above	Conduct a public tender process in accordance with this policy and the WALGA Procurement Handbook. The procurement decision is to be based on all value for money considerations in accordance with the definition stated within this policy. OR Obtain at least three (3) written quotations from a tender exempt and pre-qualified panel of suppliers pursuant to section 11(2) of the <i>Local Government (Functions and General) Regulations 1996</i> . The <i>WALGA Procurement Handbook</i> has a model Request for Quotation Template which provides best practice documentation to the Request for Quotation process and will assist with recording details.

### Local Purchasing

Where possible, the Alliance should consider supporting local businesses when purchasing goods and services. Supporting local small and medium enterprises (SMEs) has the potential to create jobs and stimulate the economy to deliver growth.

The Government of Western Australia Buy Local Policy states that State Government agencies must maximise the use of competitive local businesses in goods, services, housing and works purchased or contracted on behalf of government. Other considerations include;

- The degree of local content in bids and the potential for local industry development and employment creation through government buying. Purchasing decisions must be undertaken in accordance with specific industry development initiatives.
- Implementing arrangements for purchasing and contracting that facilitate supply relationships with local businesses.
- Exploring the capacity of local businesses to meet supply requirements.
- Purchasing decisions must be undertaken in accordance with specific initiatives of the Government that give preferential consideration to local businesses.
- Agencies must ensure that local business opportunities are maximised.



The following resources may be useful to the Alliance Group when developing a Purchasing Policy:

- For WALGA Member based services, Local Governments can visit:  
<http://walga.asn.au/Subscription-Services/Procurement.aspx>
- The Procurement Practice Guide available through the Western Australia Government Department of Finance provides an effective 'how to' framework for public sector contracting for products and/or services:  
[http://www.finance.wa.gov.au/cms/uploadedFiles/Government\\_Procurement/Guidelines\\_and\\_templates/Goods\\_and\\_service\\_procurement\\_practice\\_guide.pdf?n=4198](http://www.finance.wa.gov.au/cms/uploadedFiles/Government_Procurement/Guidelines_and_templates/Goods_and_service_procurement_practice_guide.pdf?n=4198)

Understanding and adhering to these guidelines will help the Alliance achieve efficient and effective purchasing outcomes.

- The Commonwealth Procurement Rules available through the Australian Government Department of Finance represent the Government Policy Framework under which entities govern and undertake their own procurement and combine both Australia's international obligations and good practice:  
<http://www.finance.gov.au/procurement/procurement-policy-and-guidance/commonwealth-procurement-rules/>

## 13. Communication Plan

The effective management of project communications is critical to the Aged Housing Alliance projects success. A common reason for projects faltering or failing is the poor management of communications: within the Alliance, between the team and key stakeholders.

A communication plan will make it possible for the Alliance to target its communication accurately. It provides a structure to determine whom the Alliance need to reach and how. A plan will make your communication efforts more efficient, effective, and lasting.

The Aged Housing Alliance Project Communication Plan should:

- encourage two-way exchanges of information
- effectively address key project messages
- identify communication vehicles
- identify communication accountabilities
- identify timing of communication to stakeholders involved in and affected by the project's activities
- decrease the likelihood of key stakeholders being misinformed about the project

### ***What needs to be included in a Communication Plan?***

#### Messenger

Clearly identify who will be responsible for the communications throughout the Aged Housing Alliance project. By this stage your stakeholders would have been clearly identified with a stakeholder analysis (see *Section 2 – Stakeholder Identification / Engagement*). By working through each of your stakeholders you can clearly identify the communication responsibilities of everyone involved in the project.

#### Target Audience

Who will the messenger need to communicate with? Refer to the list of stakeholders identified in your *Stakeholder Analysis* will assist in establishing who needs to be reached by the messenger.

#### Objectives

What does the messenger want to achieve through communicating? What is the reason and importance of the communication? Some examples of the objectives that the Housing Alliance may wish to include are:

- **Project Status** - a Status Report providing updates on what tasks have been completed, what milestones have been reached, what tasks are next to be completed and who will be responsible for completing them
- **Timeframe Status** – enables stakeholders to see that the project is meeting set milestones (see *Section 23 – Project Timeframes and Key Milestones*)
- **Budget Status** - updates of the projects income and expenditure (see *Section 21 - Budget*)
- **Budget Modifications** - changes to the original budget developed by the Alliance

- **Complaints** - complaints and feedback on the project that need addressing
- **Risk Management** - any changes to the risk management assessment or any incidents that have happened (see *Section 7 – Risk Analysis*)
- **Project Promotion/Media** - who will be dealing with the media for promotion of the project? When will they be contacted? How will they be contacted? What information will they be provided?

### Communication Vehicles

This outlines how the communication will take place. The communication vehicle will need to be established between the messenger and the target audience to ensure that the most effective method of communication for both parties is established. Some examples of communication vehicles that the Alliance may choose to use are:

- Email
- Written Notification (personalised letter, newsletter)
- Advertisement in the local paper
- Other community newsletters
- Executive meeting
- Stakeholder meeting
- Phone call
- Teleconference
- Video conference
- Templates (e.g. status report)

### Frequency

How often does the communication need to take place? This may be daily, weekly, fortnightly, monthly, or as required. This should be determined by the Alliance.

### Venue

Where will the communications take place? This may be a central local government within the Alliance group that has the appropriate facilities to be able to cater for the occasion. The venue may also vary depending on the communication vehicle.

The *Communication Strategy Template* provided in *appendix 6* may assist you to formalise a communication plan.

## 14. Project alignment to Local, State and Federal Policies

When developing your business case there are several local, state and federal strategies, policies and plans that may be of assistance. Familiarisation and alignment to the plans listed below will assist in quantifying the benefits of the project to potential funding organisations and how the project fits with your broader strategies. It is important to align with the interests of the funder and keep this information foremost. While it is imperative that a project fits within your strategic direction it is more important that it helps to deliver on theirs.

The *Local Government Strategic Plan-Policies Summary Table* provide in *appendix 7* will assist you to collate a list of Local Government policy and planning documents.

### **Wheatbelt Blueprint**

The Wheatbelt Blueprint is a document developed by the Wheatbelt Development Commission (WDC) in 2015 that acts as a road map to assist the Wheatbelt region deliver on its full potential. This document identifies the Wheatbelt as currently having an older population and indicates that this sector of the population is predicted to increase due to both improved health outcomes and the in-migration of retirees into the region due to affordability pressures being experienced in the metropolitan area.

The Wheatbelt Blueprint indicates that the availability of suitable housing will support the retention of the ageing population in the area. The WDC has identified various outcomes and priority actions in regards to aged housing to deliver the Wheatbelt Blueprint. The Commission also aims to support local governments plan for and deliver age friendly communities.

For further information on the Wheatbelt Blueprint contact the Commission on (08) 9622 7222 or email [info@wheatbelt.wa.gov.au](mailto:info@wheatbelt.wa.gov.au)

### **Sub-Regional Economic Development Plans**

Sub-Regional Economic Strategies have been developed for the identified Sub-Regions of Avon, Central Coast, Central East, Central Midlands and Wheatbelt South. These Economic Strategies provide economic analysis and evidence based guidance to assist in investment and decision making. Regions can therefore make a major contribution to sub-regional and whole-of-region planning. This Strategy also establishes a framework for the promotion and facilitation of economic and population growth across all towns in the Sub-regions.

Sub-Regional Economic Strategies can be downloaded at:  
<http://www.wheatbelt.wa.gov.au/publications/economic-development-plans/>

These documents have been developed by the WDC. For further information on these publications please contact the Commission on (08) 9622 7222 or email [info@wheatbelt.wa.gov.au](mailto:info@wheatbelt.wa.gov.au)

It is encouraged that you read your Sub-Regions Economic Strategy to identify if there are any actions outlined relevant to aged housing and population growth/retention in your sub-region. The table below outlines which sub-region your shire is located.

Sub-Region	Shires of
Avon	Beverley, Cunderdin, Dowerin, Goomalling, Koorda, Northam, Tammin, Toodyay, Quairading, Wyalkatchem, York
Central Coast	Dandaragan, Gingin
Central East	Bruce Rock, Kellerberrin, Merredin, Mount Marshall, Mukinbudin, Narembeen, Nungarin, Trayning, Westonia, Yilgarn
Central Midlands	Chittering, Dalwallinu, Moora, Victoria Plains, Wongan-Ballidu
Wheatbelt South	Brookton, Corrigin, Cuballing, Dumbleyung, Kondinin, Kulin, Lake Grace, Narrogin, Pingelly, Wagin, Wandering, West Arthur, Wickepin, Williams

### **Wheatbelt Aged Support and Care Solutions Report**

In 2012, local governments in the Wheatbelt identified the need to address current issues surrounding aged care. The Wheatbelt Aged Support and Care Solutions aims to develop a holistic regional solution that allows older people to remain in their communities as their care needs change.

The Wheatbelt Aged Support and Care Solutions Report can be downloaded at:  
<http://www.wheatbelt.wa.gov.au/publications/aged-care/>

For further information on this publication please contact the Commission on (08) 9622 7222 or email [info@wheatbelt.wa.gov.au](mailto:info@wheatbelt.wa.gov.au).

### **Seniors Strategic Planning Framework**

Ageing well requires planning to enable older Western Australians to age with dignity, maintain their independence, play active and valued roles and have their rights respected and upheld.

The Department of Local Governments and Communities Seniors Strategic Planning Framework is available at:  
<https://www.dlqc.wa.gov.au/Publications/Pages/Seniors-Strategic-Planning-Framework.aspx>

### **Tools to developing an Age Friendly Community**

**Age-Friendly WA Toolkit** – The Department of Local Governments and Communities have developed an Age-Friendly Toolkit. The steps involved in the age-friendly community process will assist your community to identify the age-friendly features, age-friendly barriers and suggestions for improvements in relation to their physical and social environment.

The Age-Friendly WA Toolkit is available at:  
<https://www.dlqc.wa.gov.au/Publications/Documents/AgeFriendlyWAToolkit.pdf>

**Age Friendly Community Planning Guide** - The Wheatbelt Development Commission Age Friendly Community Planning Guide outlines a process and offers useful tools and resources for Age Friendly Community Planning. It is non prescriptive and is expected that each community will have its own style and language when completing this strategic plan.

The Age Friendly Community Planning Guide is available at:  
[http://www.wheatbelt.wa.gov.au/files/3314/1929/6046/Age\\_Friendly\\_Community\\_Planning\\_Guide\\_FINAL.pdf](http://www.wheatbelt.wa.gov.au/files/3314/1929/6046/Age_Friendly_Community_Planning_Guide_FINAL.pdf)

## **Regional Development Australia Wheatbelt Regional Plan**

The Wheatbelt Regional Plan 2013-2018 is a five-year strategic outlook for the Wheatbelt region that aims to inform decision makers about appropriate policy for the region and provide a focus for investment. This document covers the topic of Ageing Population and Aged Care within the Wheatbelt Region (refer to page 15 – Ageing Population and page 42 – 2.4.4 Aged Care). A copy of the Wheatbelt Regional Plan can be downloaded from the Wheatbelt Regional Development Australia webpage: <http://www.rdawheatbelt.com.au/get-to-know-us/regional-plan>

## **State Planning Strategy**

The purpose and function of this document is to provide a credible State strategic context and basis for the integration and coordination of land-use planning and development across state, regional and local jurisdictions. In an aged housing context, the State Planning Strategy aims to ensure people who are ageing can remain in their communities long-term. The provision of aged care retirement housing options and land tenure arrangements will ease the stress on the State's service delivery programs (refer to page 14 and 91).

*Extract from page 14*

*“The Western Australian population is ageing (Figure 8). Over the next 40 years the proportion of the population aged 65 or over is likely to increase from 13% to 22% and, in contrast, the proportion aged 15 or under is likely to decrease slightly from 19% to 18%”.*

The State Planning Strategy is available at:

[http://www.planning.wa.gov.au/dop\\_pub\\_pdf/State\\_Planning\\_Strategy\\_2050.pdf](http://www.planning.wa.gov.au/dop_pub_pdf/State_Planning_Strategy_2050.pdf)

## **Wheatbelt Regional Planning and Infrastructure Framework (2015)**

The Western Australia Planning Commission (WAPC), in partnership with Regional Development Commissions, Regional Development Australia (RDA) and local governments has prepared Regional Planning and Infrastructure Frameworks for the State's eight country planning regions. The purpose of each framework is to establish a regional vision and basis for decision-making. The frameworks also introduce a number of planning initiatives, which form the basis of an ongoing work program for the Department of Planning.

The WAPC aim to develop planning guidance that can be used in Wheatbelt planning schemes to provide a flexible approach for the planning and development of aged-care sites (refer to section 3.7 Housing on page 16 and 3.8 Human Services page 18).

The Wheatbelt Regional Planning and Infrastructure Framework (2015) is available at:

<http://www.planning.wa.gov.au/6971.asp>

## **Council On The Ageing (COTA) Western Australia Age Friendly Communities Network**

In 2012, the Council on the Ageing (COTA), in partnership with the Western Australian Local Government Association (WALGA), the Department of Local Government and Communities (DLGC) and the City of Melville (CoM) hosted a forum designed to establish an Age-Friendly Communities Network (AFCN) for local government officers. For more information on the Age Friendly Communities Network visit the Council On The Ageing webpage: <http://www.cotawa.org.au/programs-projects/age-friendly-communities-network/>

## Department of Social Services

There are also some valuable resources available on the Department of Social Services webpage\* such as:

- Formative evaluation of the Home Care Packages Programme (formerly known as HACCC): <https://www.dss.gov.au/our-responsibilities/ageing-and-aged-care/aged-care-reform/home-care/home-care-packages-reform>
- Caring for Older Australians - *Productivity Commission Inquiry Report Volume 1*: <http://www.pc.gov.au/inquiries/completed/aged-care>
- Australian Government Response to the Productivity Commission's Care for Older Australian Report: <https://agedcare.health.gov.au/ageing-and-aged-care-publications-and-articles-ageing-and-aged-care-reports/australian-government-response-to-the-productivity-commissions-caring-for-older-australians-report>
- Commonwealth Home Support Programme - *Programme Manual 2015*: <https://www.dss.gov.au/ageing-and-aged-care-publications-and-articles-fact-sheets/commonwealth-home-support-programme-programme-manual-2015>
- Commonwealth Home Support Programme Information sheet – *overview of programme and feedback process*: <https://agedcare.health.gov.au/ageing-and-aged-care-programs-services-commonwealth-home-support-programme/information-sheet-commonwealth-home-support-programme-programme-manual>

\*Due to recent government changes, responsibility for ageing and aged care is now part of the Department of Health. Information about ageing and aged care is still available on the Department of Social Services website, however it will be transferred to the Department of Health website in 2016.

## 15. Housing Design

Housing design that supports the delivery of aged care and allows people to age-in-place as their needs change, is essential in delivering a holistic and comprehensive solution to aged care in regional WA. It is also important to consider Environmental and Energy Efficient Design Specifications and Building Codes when considering appropriate design requirements for community housing.

The following guidelines and specifications should be considered throughout the planning stages:

### a. Livable Housing/Universal Design Specifications

Livable Housing Australia (LHA) is a partnership between community and consumer groups, government and industry. LHA champions the mainstream adoption of liveable housing design principles in all new homes built in Australia. LHA arose from the Kirribilli Dialogue on Universal Housing Design, which established nationally agreed guidelines on designing and building liveable homes.

The Livable Housing Guidelines which have been developed by industry and the community provide assurance that a home is easier to access, navigate and live in, as well as more cost effective to adapt when life's circumstances change.

The LHD Guidelines provide useful information for consumers seeking to introduce these liveable design features into a new home. The guidelines describe 16 liveable design elements. Each element provides guidance on what performance is expected to achieve either silver, gold or platinum level accreditation. Some of these liveable design features include:

- A safe continuous and step free path of travel from the street entrance and / or parking area to a dwelling entrance that is level
- At least one, level (step-free) entrance into the dwelling
- Internal doors and corridors that facilitate comfortable and unimpeded movement between spaces
- A toilet on the ground (or entry) level that provides easy access
- A bathroom that contains a hobless (step-free) shower recess
- Reinforced walls around the toilet, shower and bath to support the safe installation of grabrails (even if the grabrails are installed at a later date)
- A continuous handrail on one side of any stairway where there is a rise of more than one metre
- Stairways are designed to reduce the likelihood of injury and also enable future adaptation

It is encouraged that the Livable Housing Guidelines are utilised in partnership with an architect to develop a housing plan that will be both accessible and universally designed to cater for a wide range of occupants. The Livable Housing Guidelines is available at: <http://www.livablehousingaustralia.org.au/>



## b. Dementia Design Specifications

A well designed environment, planned with cognitive impairment in mind, can help maintain abilities and provide meaningful engagement by providing essential prompts, accessibility and reduce risks to support a person with dementia. A poorly designed environment can be confusing and at worst, disabling and even dangerous for those with dementia.

The Dementia Enabling Environment Project (DEEP) Virtual Information Centre provides practical tips, guides and resources to help make the places where we live more dementia enabling. This will encourage a person with dementia to lead a full and independent life for as long as possible. These can be simple modifications that anybody can make to their home, to landscaping or architectural design. A feature of DEEP enables you to explore different home settings and learn more about the key design principles in each area of your house. For more information visit the DEEP website:

<http://www.enablingenvironments.com.au/>

## c. Environmental/Energy Efficient Design Specifications

There are several areas where you may choose to make your housing more environmental and energy efficient. These areas include:

<i>Passive design</i>	Designs that take advantage of natural heating and cooling can increase comfort and use less energy
<i>Materials</i>	Carefully choosing materials can reduce harmful health effects, minimise waste and environmental impact
<i>Energy</i>	Learn how to reduce power consumption and about renewable energy systems
<i>Water</i>	Learn how to reduce water use inside and outside your house through improved water use efficiency as well as possible collection of stormwater and options for recycling water

The Your Home website is a guide to building, buying or renovating a home. It shows you how to create a comfortable home with low impact on the environment, that is economical to run, healthier to live in and adaptable to your changing needs. It is encouraged that the Your Home website is utilised particularly when considering environmental/energy efficient design specifications. The Your Home website is available at:

<http://www.yourhome.gov.au/introduction/welcome-your-home>

## d. Building Codes

The National Construction Code (NCC) sets out the legal construction requirements for all new building work in Australia. It includes performance requirements that must be achieved for each aspect of building construction.

In designing a home that incorporates the design elements of the LHD Guidelines it is important to ensure that all building work also complies with the relevant National Construction Code which is inclusive of the Building Codes of Australia (BCA) Volume 1 and 2 as well as the Plumbing Code of Australia (PCA) volume 3. The three volumes cover topics such as structure, fire

resistance, health and amenity, plumbing, building access and egress and building services and equipment.

The NCC is an initiative of the Council of Australian Governments developed to incorporate all on-site building and plumbing requirements into a single code. The NCC sets the minimum requirements for the design, construction and performance of buildings throughout Australia.

NCC 2015, NCC 2016 and all archived editions of the Code are available from the Australian Building Codes Board webpage:

<http://www.abcb.gov.au/Resources/NCC>

#### **e. Other Specifications/Requirements**

There are several other design elements to consider throughout the planning stages as outlined below:

##### Emergency Vehicle Access

Emergency vehicles need to be able to get within close proximity to the house. Emergency vehicles are generally larger than standard vehicles and need extra room for turning, parking and to open up rear access doors.

##### Gardens and Landscaping

Will there be gardens that the residents are required to maintain (i.e. courtyard, front garden)? Consideration for more accessible solutions such as raised garden beds should be a priority. Communal gardens could be considered where there are shared communal areas in the design.

##### Emergency Systems

Built-in emergency alarm system that allows residents to call for help. There are many options available from hand held remotes through to inbuilt alarm buttons on walls or within phone systems.

##### Security and Privacy

Inclusion of alarm systems, motion censored security lighting and crime-safe doors provide security to residents making them feel safe and secure within their environment.

##### Active Community Spaces

Will the development include communal spaces such as a barbeque area, gazebo, park area, paths, seating or other facilities that can be utilised by all the residents? The accessibility and safety aspects on making these communal spaces universal and liveable will need to be considered.

## 16. Site Design

Effective site design ensures that the land in which the Independent Living Units (ILUs) are situated, are developed in a way that provides appropriate access, meets the relevant planning codes and creates a connected and safe space for residents and visitors.

The following elements should be considered in planning the site design:

### a. Disability Access

It is essential to provide disability access to both the site and any buildings located on the site. Some aspects to consider, as outlined within the Livable Housing Australia Guidelines (LHA) include:

- provide easy access from both the street and car parking spaces in all weather and light conditions
- avoid stairs and use ramps only where essential
- design both ramps and stairs in compliance with AS 1428.1
- construct access paths from well drained, solid, non-slip surfaces that provide a high colour contrast to surrounding garden areas
- light pathways with low level lighting directed at the path surface, not the user
- protect paths and entries from weather
- avoid overhanging branches and plants which may cause hazards

The LHA guidelines can be viewed at <http://www.livablehousingaustralia.org.au>

Household activities such as mail collection, rubbish storage, car parking and enjoyment of outdoor spaces must also be considered in designing for full accessibility. The Your Home website suggests more ways to make a site more accessible for a person with a disability:

- Make rubbish bins, recycling storage, letterboxes, clotheslines and garden tool storage accessible along paths
- Provide access and circulation space to external areas such as patios and terraces
- Provide private, sheltered areas with access to northern sun in winter, visible from inside the home
- Allow for raised garden beds in the initial garden layout
- Locate car parking close to the entry with at least one covered parking space sized to enable wheelchair access
- Install electronically operated garage doors
- Allow secure space for future storage and recharging of a wheelchair or other mobility device such as a scooter
- Ensure that garden and fence layouts do not compromise security by limiting visibility through the site
- Ensure that house or unit numbers are clearly visible from the street
- Use movement activated sensor lights

The guidelines can be viewed at: <http://www.yourhome.gov.au/housing/livable-and-adaptable-house>

Specific Local Government housing requirements will need to be reviewed in accordance with their local Disability Access and Inclusion Plans (DAIPs). DAIPs assist public authorities to plan and implement improvements to access and inclusion across seven outcome areas, which include, services and events, buildings and facilities, information, quality of service, complaints, consultation processes and employment. The intent for most Local Governments is to encompass their DIAP within all the other Council plans and strategies as part of an integrated planning approach. The DIAPs may be able to provide some guidance to the Alliance.

**b. Dementia Design**

The Dementia Enabling Environment Project (DEEP) Virtual Information Centre provides practical tips, guides and resources to help make the places where we live more dementia friendly. This assists to encourage a person with dementia to lead a full and independent life as much as possible. These can be simple modifications that anybody can make to their home, landscaping or architectural design. For more information visit the DEEP website: <http://www.enablingenvironments.com.au/>

**c. Other specifications/Requirements**

Site design is an important element to the development of creating sustainable and liveable communities. The urban form should take into account items including but not limited to:

- Development conforms to the density code designated in the scheme
- Achieves the objectives of the local planning framework
- Building setback is appropriate from street boundaries and lot boundaries to provide adequate space for parking, solar access & ventilation (buildings), utilities, easements (service corridors), landscaping and open space and privacy for dwellings
- Appropriate location and design of vehicular parking and pedestrian access points
- Visual privacy of active habitable spaces and outdoor living areas on adjacent dwellings or from proposed adjacent dwellings
- Solar orientation of the dwelling and solar access

Elements for site design should be based on the guidance provided by the Local Planning Scheme for your Local Government. This will indicate the current zoning of land, the residential density as well as relevant strategic and statutory documents for compliance and regulation.

Residential density is attributed as R-Codes in local planning schemes. This code provides a guideline to the acceptable residential density for the lot/area in question. The R-Code is determined as the number of dwellings per hectare. An example is R10, meaning 10 dwellings per hectare can be built (average of 1000m<sup>2</sup> per lot site area).

**Table 1: General site requirements for all single house(s) and grouped dwellings; and multiple dwellings in areas coded less than R40**

1 R-Code	2 Dwelling type	3 Minimum site area per dwelling (m <sup>2</sup> ) ◆	4 Minimum lot area/rear battleaxe (m <sup>2</sup> ) ▼	5 Minimum frontage (m) ▼	6 Open space		7 Minimum setbacks (m)		
					min total (% of site)	min outdoor living (m <sup>2</sup> )	primary street	secondary street ●	other/rear
R2	Single house or grouped dwelling	Min 5000	-	50	80	-	20	10	10
R2.5	Single house or grouped dwelling	Min 4000	-	40	80	-	15	7.5	7.5
R5	Single house or grouped dwelling	Min 2000	-	30	70	-	12	6	* /6
R10	Single house or grouped dwelling	Min 875 Av 1000	925	20	60	-	7.5	3	* /6
	Multiple dwelling	1000	-	-	60	-	7.5	3	* /6
R12.5	Single house or grouped dwelling	Min 700 Av 800	762.5	17	55	-	7.5	2	* /6
	Multiple dwelling	800	-	-	55	-	7.5	2	* /6
R15	Single house or grouped dwelling	Min 580 Av 666	655	12	50	-	6	1.5	* /6
	Multiple dwelling	666	-	-	50	-	6	1.5	*
R17.5	Single house or grouped dwelling	Min 500 Av 571	587.5	12	50	36	6	1.5	*
	Multiple dwelling	571	-	-	-	-	6	1.5	*
R20	Single house or grouped dwelling	Min 350 Av 450	450	10	50	30	6	1.5	*
	Multiple dwelling	450	-	-	50	-	6	1.5	*
R25	Single house or grouped dwelling	Min 300 Av 350	425	8	50	30	6	1.5	*
	Multiple dwelling	350	-	-	50	-	6	1.5	*
R30	Single house or grouped dwelling	Min 260 Av 300	410	-	45	24	4	1.5	*
	Multiple dwelling	300	-	-	45	-	4	1.5	*
R35	Single house or grouped dwelling	Min 220 Av 260	395	-	45	24	4	1.5	*
	Multiple dwelling	260	-	-	45	-	4	1.5	*
R40	Single house or grouped dwelling	Min 180 Av 220	380	-	45	20	4	1	*
	Multiple dwelling	220	-	-	45	-	4	1	*
R50	Single house or grouped dwelling	Min 160 Av 180	380	-	40	16	2	1	*
	Multiple dwelling	180	-	-	40	-	2	1	*
R60	Single house or grouped dwelling	Min 120 Av 150	380	-	40	16	2	1	*
	Multiple dwelling	150	-	-	40	-	2	1	*
R80	Single house or grouped dwelling	Min 100 Av 120	380	-	30	16	1	1	*
	Multiple dwelling	120	-	-	30	-	1	1	*

**Legend**

- ◆ subject to variations permitted under clause 5.1.1 C1.4
- ▼ only applies to **single houses**
- **secondary street:** includes **communal street**, private street, **right-of-way** as street
- indicated not applicable
- \* see **Tables 2a** and **2b** and clause 5.1.3
- Av. average **site** area

All standards for single house or grouped dwellings within R100, R160 and R-AC areas are as for the R80 Code

**(Source: State Planning Policy, 3.1 Residential Design Codes, Table 1, page 59)**

With regards to specific Local Government requirements imposed on development, it is important that you review your local Council's Local Planning Scheme and the Local Planning Strategy. This is essential to ensure that the requirements set by that Council are reflected in the site design considerations in conjunction with State Planning Policies.

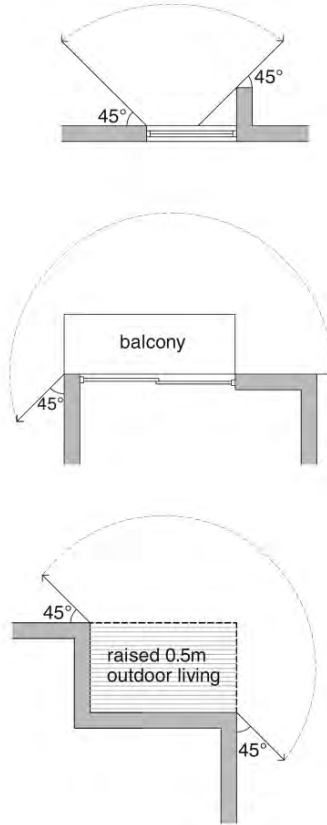
The Western Australian Department of Planning website provides access to Local planning schemes. The Local planning schemes are available at: <http://www.planning.wa.gov.au/Local-planning-schemes.asp>

With regards to visual privacy, it is important to understand the cone of vision in the design of sites and the location of buildings and windows. Utilising the cone of vision in locating dwellings will ensure that steps are taken to implement screening where appropriate and to site dwellings as to reduce or mitigate privacy issues. An example from the State Planning Policy applying the cone of vision to a building design illustrated below.

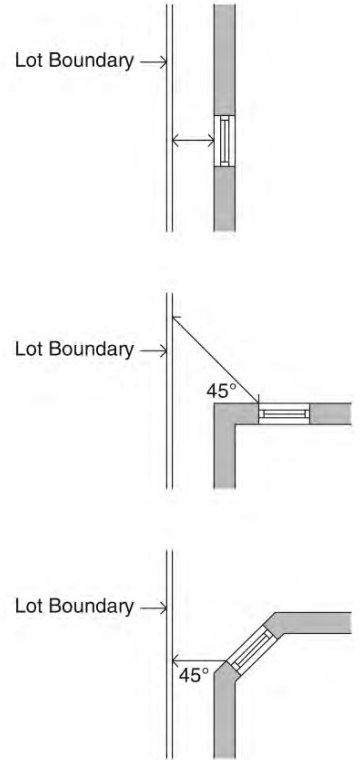
**Intent**

The purpose of figure series 10 is to illustrate how to establish the **cone of vision** to determine overlooking, and how to measure privacy **setbacks** for the purposes of clauses 5.4.1 C1.1 and 6.4.1 C1.1.

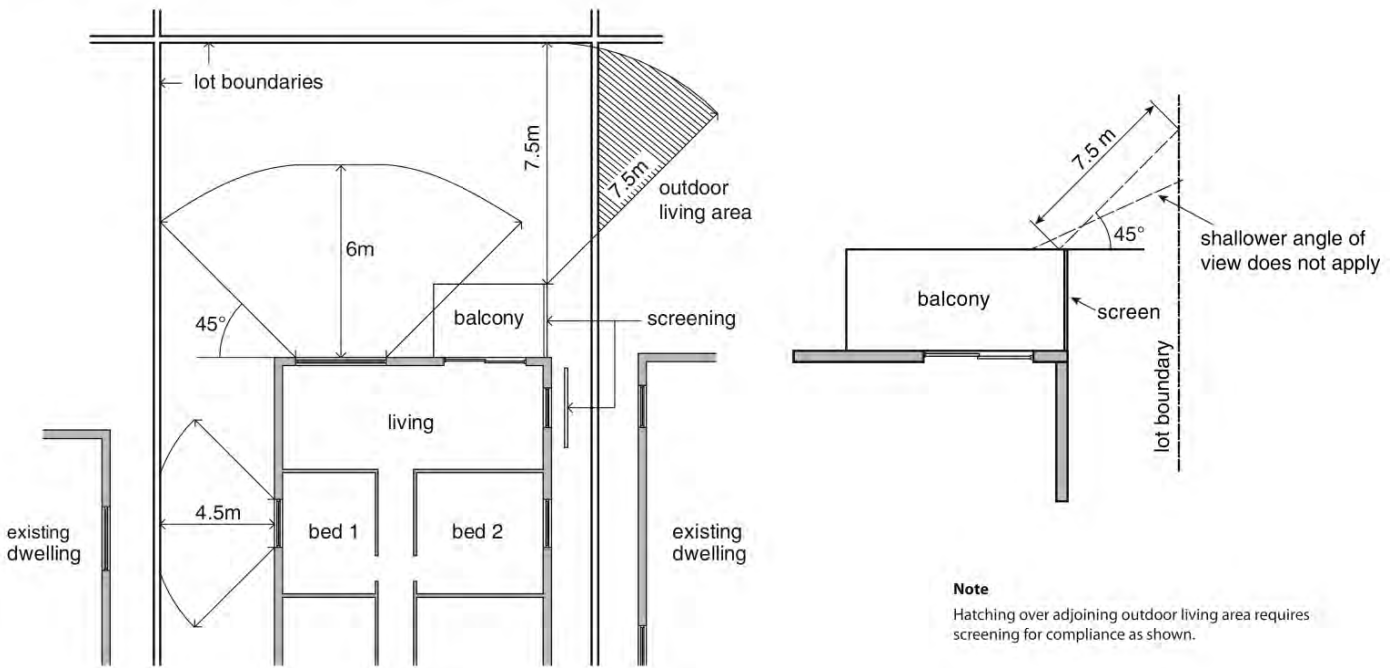
**Figure 10a – Establishing the horizontal component of cone of vision**



**Figure 10b – Measurement of minimum privacy separation distances**



**Figure 10c – Measuring privacy setbacks using the cone of vision**



**(Source: State Planning Policy, 3.1 Residential Design Codes, Figure Series 10, page 77 - 78)**

Full guidelines and policies which relate to site design can be found from the following Western Australian Planning Commission sources:

- Liveable Neighbourhoods (2009): <http://www.planning.wa.gov.au/Liveable-neighbourhoods.asp>
- State Planning Policy 3.1: Residential Design Codes (2015), particularly Part 5 Residential Design Codes for dwellings and Part 5.2.2 for Aged or dependent persons dwellings: <http://www.planning.wa.gov.au/Residential-design-codes.asp>
- State Planning Policy 3.1: Residential Design Explanatory Guidelines (2015): <http://www.planning.wa.gov.au/Residential-design-codes.asp>

## 17. Aged Housing in the broader Aged Care context

### a. Service Provider Engagement

In order to ensure aged housing developments enhance the delivery and access to aged care, it is important to identify the existing and required Aged Care services within the Alliance. The Alliance will need to engage with the providers of aged care services to determine what services are already being delivered and how the aged housing development may influence the delivery of services in the future.

It will also be beneficial to outline the positive outcomes that the Aged Housing Development will have on existing services, the potential to expand existing services and identify any opportunities to develop services that are currently absent within the region.

The Wheatbelt Aged Support and Care Solutions Report (Verso Consulting) identifies four planks to support older people to age well in Wheatbelt communities. These four planks are:

1. **Age-Friendly Communities** – The foundation plank of Age-Friendly Communities is a World Health Organisation initiative with defined areas of activity and infrastructure that assist older residents to remain active, well and socially engaged. 100% of older people benefit from this plank
2. **Age Appropriate Housing** – The second plank of housing plays a crucial role in an older persons' decision to remain living independently
3. **Community Aged Care** – A range of Community Aged Care programs constitute the third plank and provide a range of in home support and care. It is estimated that this plank supports up to 30% of all older people. The policy trend in these programs is towards income tested fees contributions
4. **Residential Aged Care** - The fourth plank of Residential Aged Care relates to nursing and aged care services provided in conjunction with accommodation in a purpose built facility. In regional WA the proportion of older people in residential care is variable but averages around 5% to 6%

Each plank could be instituted without the other, however by layering one upon another, each plank supports the next with ever increasing impact and inherent synergies. The first three planks are readily applicable to local action or influence and therefore offer a path to a level of local empowerment.

By engaging with local service providers, housing can be built to better facilitate local service delivery, service delivery can be made more efficient and appropriate for the community and crucial knowledge from service providers can be considered throughout the development process.

Some possible service providers that may deliver aged person services to your communities are:

- Department of Health/WA Country Health Service - Nursing Posts, Hospitals, GP Services, Physiotherapist, Dieticians, Occupational Therapists, PathWest
- HACC and Commonwealth Home Care Programs
- Local Housing Associations
- WA Department of Local Government of Communities (programs)



- Private enterprise - GP, Physiotherapist, Dieticians, Occupational Therapists, Dentist
- Community groups and organisations - meals on wheels, craft groups, seniors groups

It is recommended that the Alliance engage with their identified service providers to determine how they can support each other. This may be by referring to documents, policies or procedures adopted by these organisations that support ageing in place or obtaining a letter of support from them to illustrate their support for your Aged Housing Development Project.

The following resources may be useful to you for additional information on service provider engagement:

- My Aged Care website – Will assist you in locating current service providers:  
<http://www.myagedcare.gov.au/service-finder?tab=help-at-home>
- The Wheatbelt Aged Care Assessment Team (WACAT) – Located in Northam WACAT can be contacted by email  
[wachs-wheatbeltacat@health.wa.gov.au](mailto:wachs-wheatbeltacat@health.wa.gov.au) or phone (08) 9690 1318
- Department of Social Services Ageing and Aged Care website – Will provide more information on the reform of the aged care system in Australia:  
<https://www.dss.gov.au/our-responsibilities/ageing-and-aged-care/aged-care-reform>

## 18. Operational Governance

The Alliance will need to establish an Operational Management/Governance Agreement to provide a legally binding framework for a recommended minimum period of five years. The agreement puts appropriate controls in place to ensure the Aged Housing Project will:

- be used for their intended purpose
- will generate satisfactory revenue to be adequately maintained
- used for the benefit of the community, and
- prevent the sale of the property without appropriate consent

Some suggested areas to be covered within the agreement are:

### Ownership

Prior to the constructing of the Aged accommodation building/s, it needs to be clearly identified who will become the owner of the property or properties by developing an ownership transfer agreement. This can be done by developing an ownership model.

Once the ownership is determined the agreement will need to cover other ownership responsibilities such as:

- **Insurance** - will a specified minimum cover amount and minimum required cover be established? What is the owner's ability to afford this cover and their commitment to ensuring the appropriate cover is held for the property?
- **Depreciation** - Tax depreciation (also known as property depreciation) is a legitimate deduction against assessable taxable income, generated by a residential or commercial investment property. It works by allowing property investors to deduct a portion of the original costs of plant and equipment (such as furniture and fittings) and capital works (such as renovations) on their investment property each financial year, over the effective life of that item. The Australian Taxation Office recognises that the value of capital assets gradually reduces over time as they approach the end of their effective life. These assets can be written off as a tax deduction - known as depreciation.
- **Asset Management** - If the ownership is held by the local Council, the new asset/s will need to be included in their respective Local Government Asset Management Plans in line with the Integrated Planning and Reporting (IPR) requirements.
- **Income generation** - The direct economic benefit for the Alliance will be the income generated from rental of the accommodation. The Alliance will need to determine how the generated revenue will be expended. Will funds be put into a reserve for maintenance on the property? Will there be an opportunity for the revenue generated to be invested back into future property construction to meet the needs of the growing aged population?
- **Consent for Sale of Properties** – If for whatever reasons the Alliance or individual Council plan to sell their property/properties, what will be the nominated process to allow this to happen?

## Management and Maintenance of the Properties

You will need to establish whether the properties will be managed by a central management body across the Alliance or if each individual Council will be responsible for the management, operation and maintenance of the housing within their shire. If any third parties are involved they will need to be clearly identified. Relevant policies, procedures and constitution will need to be obtained as they will assist with the planning process.

Consideration needs to be given for the following management and maintenance areas:

- Management of Tenants/Lease Agreements
  - Establishing rental rates – determine if the rates will be set by the Alliance or individual Councils
  - Lease Agreements – ascertain if a generic agreement will be developed by the Alliance or developed by the individual Councils managing their properties
  - Establishment of an eligibility criteria for tenants – the Alliance will be required to resolve if tenant eligibility will be means tested. Will the criteria be uniform across all the local governments or will each shire establish their own criteria?
- Organising maintenance on housing, gardens and landscaping. The Alliance will need to:
  - Determine who will be responsible for organising maintenance on the buildings
  - Determine who will pay for the ongoing maintenance costs of the properties, and
  - Determine who will be responsible for dealing with any complaints, and what will be the process for dealing with complaints

## Sustainability

It is important that the you demonstrate sustainability for the future. A funding body will be more likely to approve a project that demonstrates strong operational governance proving the development is sustainable. This includes proving that the project is unlikely to require future funding for maintenance and improvements.

## 19. Regional Significance

It is important that the Alliance illustrate how the aged housing development will provide broader benefits to the region and sub-region.

Supporting documents, as outlined in *Section 14 - Project Alignment to Local, State and Federal Policies*, may assist to inform how aged housing and other aged care initiatives are able to benefit the region more broadly. For example, the Wheatbelt Blueprint identifies the need for improved aged care infrastructure and services to reflect the needs of current and future Wheatbelt residents. It also indicates that by improving the aged care infrastructure and services it will support employment in the field of health and aged care which has been identified as a rapidly growing employment industry within the Wheatbelt.

The Alliance should also identify how the housing developments in each town will interact with each other and the broader aged care sector and services within the region, and explain how the project might deliver regional benefits including:

- population growth
- increasing services
- providing accessible facilities
- supporting employment, and
- encouraging economic growth

Where possible, you should provide evidence on how the project will have greater flow-on effects within the region both economically and socially.

## 20. Funding Model

A funding strategy will need to be outlined within the business case and should consist of one or two paragraphs outlining the Alliance intentions. Provide a summary of the total project costs and indicate where the relevant funds for the project will be sourced. Clearly outline the name of the funding body and funding program/s, the percentage of the total project cost that will be requested and the percentage of funds committed by the Alliance and any other sources.

Your project may be intrinsically linked to a bigger project, for example this project may involve the construction of 12 units across 5 local governments but there may be an overall plan to develop a total of 32 units.

Your monetary figures listed within this section need to be directly linked and equal those outlined within your project budget. See *Section 21- Budget*.

## 21. Budget

The project budget is a detailed estimate of all the costs required to complete project tasks. A budget must be completed when developing a business case, to ensure that funders have a comprehensive understanding of your Project's costs.

There are two main approaches you can take when creating a budget:

- Top-down approach: deciding how much the project will cost and dividing the amount between the project tasks.
- Bottom-up approach: estimating the total cost of the project by costing each of the individual project tasks and rolling up.

### Top-Down Budgeting Approach

The decision is made, often by senior management or in this case the Alliance group, about how much the project should cost. This amount is divided between the project tasks. This approach is more than guessing. Justification as to how you will do the work within the allocated budget for each project task is imperative. Prior experience from other projects will be pivotal in validating the budget allocation for project tasks. It should be asked whether the budget looks realistic based on experience from past projects.

The advantage of the top-down budgeting approach is that it focuses on achieving the project within the allocated budget which leads to efficiencies and reduction in wasteful practices.

A disadvantage of the top-down budgeting approach is that it assumes that the person creating the budget has enough knowledge and expertise to make a reasonable cost estimate. If they do not, conflict may occur when a person required to execute the project is given an unrealistic budget that is insufficient. There is a risk of deliberately creating low budgets with the belief that it will encourage cost savings.

### Bottom-Up Budgeting Approach

The Alliance, often involving the relevant appointed financial management officer, identify the tasks and activities needed to complete the project. The project is based on the lowest-level project tasks and rolled up to arrive at the total project cost. The direct and indirect costs are calculated for each project task.

The advantage of the bottom-up budgeting approach is its accuracy (providing all tasks or activities are included). The budget creator (usually the project manager) involves members of the Alliance in budget formation which creates a sense of ownership. This approach is sometimes called participative budgeting for this reason.

A disadvantage of the bottom-up budgeting approach is the difficulty in getting a full list of tasks and activities needed to complete the project. It is easy to miss tasks that will be required resulting in non-budget expenses being incurred.

### Other Methods

In addition to the top-down and bottom-up budgeting approaches, there are a number of other techniques that project managers use to create budgets. There are five alternative approaches used to create budget estimates:

1. **Expert Judgment:** This approach uses subject matter experts (SMEs) to calculate the total cost of the project. This approach can be useful because, with the aid of expert knowledge and experience, you can account for factors that are not always apparent to non-experts.
2. **Supplier Bid Analysis:** This approach compares bids from different suppliers to arrive at a cost estimate for the project. This may involve calling for Expressions of Interest from suppliers for specific aspects of the project.
3. **Analogous Estimating:** This approach uses history from similar projects to create an estimate. It looks at how much past projects cost while taking any differences with the new project into account.
4. **Three-Point Estimating:** This approach uses the weighted average of three estimates – best case, most likely case and worst case - to gain a greater degree of control over how the value of a task or activity is calculated.
5. **Parametric Estimating:** This approach uses a statistical relationship between historical data and other variables, such as lines of code in a software application or square footage of a building to calculate an estimate.

Whichever budgeting approach chosen, spend time to create budgets, check it carefully, and review it often to ensure it is correct.

The *Site Build Estimates Template* provided in *appendix 8* may assist you to perform a thorough project cost estimate. The *Budget Summary Template* provided in *appendix 9* is a less detailed cost overview that can be included within the business case document.

Below is an example of a summarised project budget. This example has been developed for a three (3) phased project but can be customised to represent additional phases as required.

PROJECT INCOME		Secured	PHASE 1	PHASE 2	PHASE 3	TOTAL
Cash	Shire of xx	YES	\$120,000.00	\$120,000.00	\$120,000.00	<b>\$360,000.00</b>
	Shire of xx	YES	\$120,000.00	\$120,000.00	\$120,000.00	<b>\$360,000.00</b>
	Shire of xx	YES	\$120,000.00	\$120,000.00	\$120,000.00	<b>\$360,000.00</b>
	Shire of xx	YES	\$120,000.00	\$120,000.00	\$120,000.00	<b>\$360,000.00</b>
	Shire of xx	YES	\$120,000.00	\$120,000.00	\$120,000.00	<b>\$360,000.00</b>
	R4R Funding	NO	\$1,510,000.00	\$1,110,000.00	\$1,150,000.00	<b>\$3,770,000.00</b>
	Other	NO	\$0.00	\$0.00	\$0.00	
In Kind	Shire of xx	YES	\$55,000.00	\$0.00	\$0.00	<b>\$55,000.00</b>
	Shire of xx	YES	\$0.00	\$55,000.00	\$0.00	<b>\$55,000.00</b>
	Shire of xx	YES	\$0.00	\$0.00	\$55,000.00	<b>\$55,000.00</b>
	Shire of xx	YES	\$55,000.00	\$0.00	\$0.00	<b>\$55,000.00</b>
	Shire of xx	YES	\$0.00	\$55,000.00	\$0.00	<b>\$55,000.00</b>
	Other	NO	\$0.00	\$0.00	\$0.00	<b>\$0.00</b>
<b>TOTAL</b>			<b>\$2,220,000.00</b>	<b>\$1,820,000.00</b>	<b>\$1,805,000.00</b>	<b>\$5,845,000.00</b>

PROJECT EXPENDITURE			PHASE 1	PHASE 2	PHASE 3	TOTAL
Items of Expenditure	Breakdown	Quality of Estimates	2016-2017	2017-2018	2018-2019	
Professional Fees and Project Manager	Architect, Structural Engineer, Project Manager	Expert Judgment/Quote	\$250,000.00	\$0.00	\$0.00	<b>\$250,000.00</b>
Administration and Compliance	Stationary, printing, IT, Phone, Advertising of Tenders, marketing and promotion, insurances, opening events, Energy rating, planning approvals, relevant permits, applications to service providers	Analogous Estimating	\$140,000.00	\$50,000.00	\$50,000.00	<b>\$240,000.00</b>
Site Works and Land Assembly	Purchase of Land, Land Assembly, Clearing Land, Removal of Top soil, backfilling, retaining walls, power, water, septic/waste, telephone	Parametric Estimating	\$180,000.00	\$100,000.00	\$85,000.00	<b>\$365,000.00</b>
Construction and Fit Out	Construction, transportations, delivery, footings, installation, Flooring, wet area, fixtures, painting, window coverings	Analogous Estimating	\$1,200,000.00	\$1,200,000.00	\$1,200,000.00	<b>\$3,600,000.00</b>
External Construction (Post Build)	Sheds, landscaping, verandas, driveways, fencing, mail box, footpaths, communal areas	Analogous Estimating	\$300,000.00	\$200,000.00	\$200,000.00	<b>\$700,000.00</b>
Construction Contingency			\$150,000.00	\$150,000.00	\$150,000.00	<b>\$450,000.00</b>
Escalation				\$120,000.00	\$120,000.00	<b>\$240,000.00</b>
<b>TOTAL</b>			<b>\$2,220,000.00</b>	<b>\$1,820,000.00</b>	<b>\$1,805,000.00</b>	<b>\$5,845,000.00</b>

## 22. Prioritisation of Sites and Planning Construction

Prioritisation of sites is to be completed by the Alliance after receiving a comprehensive *Aged Housing Needs Analysis* to identify the key gaps and priorities in aged housing across the Alliance.

It is not recommended, nor viable in most instances, to build all the identified aged person accommodation across the Alliance in one stage, as this would require large up-front financial commitments from each of the Alliance members as well as have significant impacts on project management and staff resources. Alternatively, you can inaugurate a phased approach to constructing the aged person accommodation. The *Prioritisation Sites Planning Construction Example Template* provided in *appendix 10* identifies the four main project processes of land assembly, headworks, concept plan and design and the timeframe for actual construction of the dwellings.

You will need to prioritise which houses will be completed in each phase. The example below has suggested a three phased approach over three financial years, however your Alliance may choose a four or five phase approach over four or five years. It will depend on the number of houses required within the Alliance and each of the Council's ability to commit financially towards their projects.

You will also need to consider important factors such as land assembly and any headworks required at the site as these are factors of the project timeframe that are out of the Alliance's control. In some instances, land assembly can be a long, drawn out process, so taking this into consideration you may choose not to nominate a site for the first phase of construction when that site requires land assembly.

By prioritising the sites and planning the construction, it gives each of the Councils within the Alliance a clear indication of what will be happening within each phase and when their Shire is expected to be at the construction stage. This planned phased approach will also allow clear communication between the Alliance, the general public and potential customers.

Project Deliverables												
Shire	Phase 1 – 2017/18				Phase 2 - 2018/19				Phase 3 - 2019/20			
	Land Assembly	Head Works	Concept Plan & Design	Build ILU	Land Assembly	Head Works	Concept Plan & Design	Build ILU	Land Assembly	Head Works	Concept Plan & Design	Build ILU
Shire of XX								6 units				
Shire of XX												4 Units
Shire of XX								4 units				
Shire of XX				4 Units								2 Units



## 23. Project Timeframes and Key Milestones

Time is the most valuable resource. Once it has gone it can never be replaced. Time can be lost due to various circumstances, including poor people management, poor communication and lines of authority, lack of information, too many or too few meetings, poor record keeping, unclear objectives, lack of support and commitment from others, inadequate project tools, onerous reporting requirements, inadequate team skills, too much/too little attention to detail and focus on non-essential activities. Developing a Project Schedule/Timeframe and setting Key Milestones will allow the project to be implemented in a timely manner.

### Key Milestones

Important activities representing significant points in the projects life are identified as Key Milestones. Each of these important activities are broken down, or decomposed, into smaller more discrete activities called 'scheduled activities'.

Milestones are tools used in project management to mark specific points along a project timeline. In many instances, milestones do not impact project duration. Instead, they focus on major progress points that must be reached to achieve success. Some examples of key milestones are:

- Signing of Funding Agreements
- Concept Plans approved
- Appointment of Builder/Contractor
- Building approvals
- Completion of site preparation
- Completion of foundations and concrete pad
- Houses reach Lock Up Stage
- Final Inspection and handover from Builder/Contractor
- Completion of Acquittals and Project Evaluation
- Opening of the Aged Houses

Milestones built into the project schedule/timeframe will ensure that the project is given the best possible chance to stay on schedule. The *Schedule Timeframe and Milestones Template* provided in *appendix 11*, consists of three (3) worksheets that will assist you in setting key milestones (refer to worksheet 3).

### Project Timeframe

The Alliance must work out what needs to be done (activity definition), in what order (activity sequencing), how much it will cost (activity cost estimation), what resources are required (activity resource estimation), and how long each task will take (activity duration).

A summary of what is required in each component of project time management is described below:

- Project Scope Statement – this contains a schedule management plan which outlines the processes, tools and techniques that will be used to develop and control the project schedule. It also identifies the time and other constraints which affect the schedule.

- Activity Definition – breaking down the work that has to be done in a project into smaller components (called ‘schedule activities’) using a technique called decomposition and creating an activity list.
- Activity Sequencing – identifying and documenting the logical relationships between schedule activities using manual or computer techniques so that the schedule is realistic and achievable.
- Activity Resource Estimation – deciding on the type and quantities of resources (human, physical, material) required to perform each schedule activity. This process is closely aligned with the cost estimation and procurement and contracting project objectives.
- Activity Duration Estimation – utilises the project’s scope document, sequencing and resource estimations to estimate the amount of work or effort required to complete each scheduled activity.
- Schedule Development – this involves determining the planned start and finish dates for each scheduled activity based on a thorough analysis of the activity sequence, duration and resource estimates and project constraints.
- Schedule Implementation – once developed, the schedule should be implemented in accordance with the project scope statement.
- Monitoring and controlling the schedule – monitoring the schedule is important to determine the current status of the schedule, diagnose which schedule activities are ahead or behind schedule, and determine whether the schedule has altered. Armed with this information, steps can be taken to influence factors affecting the schedule, plan strategies and implement changes to the schedule to ensure timely completion of the project.

The *Schedule Timeframe and Milestones Template* provided in *appendix 11*, consists of three (3) worksheets that will assist you in developing a project timeframe for the Aged Housing Project. Worksheet one (Scheduled Activities) will assist in identifying all the activities and worksheet two (Timeframe of Scheduled Activities) will allow you to develop project timeframes by inserting the activities in a chronological order and selecting the activity duration. The information on worksheet two is often referred to as a Gantt Chart.

## 24. Executive Summary

The executive summary is a short section included at the beginning of the business case. The executive summary should summarise your business proposal, providing readers with an overview of the key objectives of the project, without having to read the entire document. Be concise and provide background information, an outline of project cost, benefits, priorities and main conclusions (specify your phases). Ensure that the executive summary contains the key points of interest to the funder that you are targeting.

### Structure of an executive summary

There is general agreement on the structure of an executive summary. Typically, an executive summary will:

- Be approximately 5-10% of the length of the main report
- Be written in language appropriate for the target audience
- Consist of short, concise paragraphs
- Begin with a summary
- Be written in the same order as the main report
- Only include material present in the main report
- Make recommendations
- Provide a justification
- Have a conclusion
- Can be read separately from the main report

The executive summary should be the last component to be written. This will ensure it is relevant, concise and contains only information that is included in the full document. It is simply a summary of the key information including the objective, the background and the proposed solution. The executive summary should not include any information that is not included in the document.

Areas an executive summary may cover are:

- What the project will deliver – both outputs (what the funding will pay to do) and benefits (what will be the results of this investment)
- Identified Aged Care shortages (how has the need for aged housing been determined)
- The Alliance (who is involved)
- Total Cost Breakdown (amount of funding required, amount the Alliance has committed, any other funding partners and the total project cost)
- How many houses and the type of houses to be built across the Alliance
- Indicate any planned project phases
- Include any justification for the project (benefits and projected outcomes of retaining aged persons in your communities)

## 25. Business Case Structure

The following outlines the structure of a Royalties for Regions Business Case:

1. Cover Page
2. Table of contents
3. Glossary of terms
4. Executive Summary
5. Project Scope and Evaluation
  1. Project Purpose
  2. Funding Requirements
  3. Project Description
  4. Background
  5. Policy and Strategic Framework
    - i. Alignment to State/Federal Policy Objectives i.e. Royalties for Regions
    - ii. Alignment to Related Strategic Plans
  6. Project Deliverables
  7. Stakeholder Engagement
  8. Critical Assumptions
  9. Economic and Financial Analysis
  10. Assessment of Options
  11. Funding Strategy
  12. Budget
  13. Sustainability and Ongoing Viability
  14. Project Timeframe and Key Milestones
  15. Risk Analysis
  16. Purchasing Policy (Local Content)
  17. Aboriginal and Torres Strait Islander Participation
  18. Personal Development / Training Opportunities
6. Implementation Strategy
  1. Communication Plan
  2. Project Management
  3. Project Governance
  4. Procurement Strategy
  5. Supporting Documents
7. References
8. Signatures
  1. Business Case Author / Lead Shire CEO
  2. All CEO's from within the Alliance

## 26. Business Case Writing Guidelines

- Font – Arial size 12 in paragraphs; Arial size 11 in tables
- Justify paragraphs across the page
- Ensure Proponent is appropriate for the business case (check this with the Wheatbelt Development Commission {WDC})
- Name Proponent correctly through the entire business case and on the front cover
- All images clear and crisp
- Do not refer to any attachments or appendices in the business case; instead use “supporting documents” for added information
- Create a separate file to the business case for “supporting documents”
- Save the business case from a Word document to a pdf to submit to the WDC
- Save “Supporting documents” as a separate pdf to submit to WDC
- Do not scan a copy of the business case or supporting documents from a photocopier (signing pages excepted)
- Make sure page numbers are correct (i.e. “page 49 of 42” is incorrect)
- Ensure all page numbers are correct (particularly following page breaks)
- Update table of contents before saving to pdf
- Ensure the Business Case is signed by all partners (not just the Proponent)