



Incoming resident information booklet

Specialising in complete quality aged care and independent living

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Welcome to Edgarley Assisted Living

The decision to move into aged care is not easy and Edgarley Assisted Living strives to help make this decision process as easy as possible, while providing care that respects our resident's independence, dignity and individuality.

As an aged care facility, our role is to provide for the region's elderly citizens who, for various reasons, have found it difficult to remain in their home and require assistance with their daily care needs.

Edgarley provides aged care, palliative care and dementia care, together with on-site care and support for independent residents.

As an organisation Edgarley is committed to providing person-centred care to meet the individual choices, preferences and health needs of our residents. Person centred care promotes a positive interaction between the carer and the resident and ensures the resident is actively involved in their care which supports their physical, emotional and spiritual needs.

Incoming residents are encouraged to visit and tour Edgarley Assisted Living when preparing to make their decision about moving into aged care.

The Director of Nursing and Chief Executive Officer at Edgarley are available to help residents and their families discuss the complexities involved with moving into care, please contact them if you have any questions in relation to information in this booklet.

This booklet has been developed to help prepare those who have made the decision to move into care at Edgarley easier, with much of the information contained within here developed to help residents understand what they need to bring, expectations of care, and some of the financial details involved with transitioning into full time aged care.

Who is Edgarley Assisted Living?

Established in 1955, Edgarley Assisted Living provides high quality care for its aged care and independent living unit residents with fully qualified and caring staff.

This care is provided in Edgarley's Jackson Street's care facility and 23 independent living units and continues Edgarley's pursuit of being a quality, community-based, not-for-profit, regionally-based provider in Casterton in Western Victoria.

Edgarley's commitment to quality care and the Casterton community will soon take the form of a state-of-the-art, modern and purpose-built aged care building. This new, \$14 million building redevelopment will complement the existing high-quality care currently provided to Edgarley's residents. Construction of the build is due to be completed in late 2019.

Edgarley Assisted Living prides itself on providing high quality care in a regional area in our community-based living areas.

Edgarley prides itself on being part of the Casterton community and encourages its residents to be part of our community through activities and events.

The day-to-day operations of Edgarley are managed by its Chief Executive Officer, while the business is overseen by a Board of Directors, drawn from the local community and with resident representatives.

At Edgarley, we pride ourselves on the high quality staff employed to provide care and services to our residents, including registered and enrolled nurses, a qualified chef and dietitian, personal care workers and a team of catering and maintenance staff committed to the health and wellbeing of each and every one of our residents.

The management and staff of Edgarley Assisted Living welcome you and your family to our facility and trust you will enjoy our time with us. We look forward to meeting your care needs and being of service to you.

Edgarley key contacts:

Board Chairman	Andrew Speirs
Chief Executive Officer	Steven Toope
Director of Nursing	Amanda Lee
Supervisors	Susan Richardson & Denise Fraser
Reception/Office	Jacinta Bunnik & Sally Lodge
Finance	Olivia Darcy
Continuous Improvement	Denise Fraser

Edgarley contact information:

Edgarley Home Inc
85 Jackson Street
Casterton Vic 3311
Phone: 03 5581 1211
Fax: 03 5581 2050
Email: office@edgarley.com.au
Financial/Employment inquiries – CEO – stoope@edgarley.com.au
Bed inquiries – Director of Nursing – don@edgarley.com.au
Monday to Friday 9.15 a.m. to 4.00 pm

CHARTER OF EDGARLEY ASSISTED LIVING RESIDENT'S RIGHTS AND RESPONSIBILITIES

Every person has the right to freedom and respect and the right to be treated fairly by others.

A person's rights do not diminish when he or she moves into a hostel, regardless of his or her physical or mental frailty or ability to exercise or fully appreciate his or her rights.

A positive, supportive and caring attitude by family, friends, hostel proprietors and staff, carers and the community will help people who live in hostels to continue as integral, respected and valued members of society.

Australian society has a strong commitment to social justice principles. Those principles recognize the aspirations of all Australians to a dignified and secure way of life with equal access to health care, housing and education, and equal rights in civil, legal and consumer matters. They form the basis of a society which is free of prejudice and is caring, just and humane.

This Charter affirms those social justice principles.

The personal, civil, legal and consumer rights of each resident are not diminished in any way when he or she moves into hostel.

The Charter also recognises that resident of hostels have the responsibility to ensure that the exercising of their individual rights does not affect others' individual rights, including those providing care. The Charter recognizes that residents have specific rights and responsibilities which balance the needs of the individual against the needs of the hostel community as a whole.

Each resident of Edgarley Assisted Living has the rights:

- To quality care which is appropriate to his or her needs.
- To full information about his or her own state of health and about available treatments.
- To be treated with dignity and respect, and to live without exploitation, abuse or neglect.
- To live without discrimination or victimization. The resident is not obliged to feel grateful to those providing his or her care and accommodation.
- To personal privacy.
- To live in a safe, secure and homelike environment and to move freely both within and outside the hostel without undue restrictions.
- To be treated and accepted as an individual. Each resident's individual preferences are to be taken into account and treated with respect.
- To continue his or her cultural and religious practices and to retain the language of his or her choice, without discrimination.
- To select and maintain social and personal relationships with any other person without fear, criticism or restriction.
- To freedom of speech.
- To maintain his or her personal independence, which includes recognition of personal responsibility for his or her own actions and choices.
- Some actions may involve an element of risk which the resident has the right to accept, and which should then not be used to prevent or restrict those actions.
- To maintain control over, and to continue making decisions about, the personal aspects of his or her daily life, his or her financial affairs and his or her possessions.
- To be involved in the activities, associations and friendships of his or her choice, both within and outside the hostel.
- To have access to services and activities which are available generally in the community.

- To be consulted on, and to choose to have input into, decisions about the living arrangements of the hostel.
- To have access to information about his or her rights, care, accommodation, and any other information which relates in him or her personally.
- To complain and to take action to resolve disputes.
- To have access to advocates and other avenues of redress. Reprisal in any form shall not be made against any resident who takes action to enforce his or her rights.

Each resident of Edgarley Assisted Living has the responsibility:

- To respect the rights and needs of other people within the hostel, and to respect the needs of the hostel community as a whole.
- To respect the right of staff and the proprietor to work in an environment which is free from harassment.
- For his or her own health and well-being, as far as he or she is capable.
- To inform his or her medical practitioner, as far as he or she is able, about his or her relevant medical history and his or her current state of health.

EDGARLEY ASSISTED LIVING MISSION AND PHILOSOPHY

MISSION:

To not only be known for quality care, but to be renowned for it.

PHILOSOPHY:

In pursuing our role all actions and decisions will be guided by the following principles.

- Services will be developed, operated and evaluated on the basis of the identified needs and expectations of our community and continuous communication process will be used to facilitate these processes;
- At all times, all residents are entitled to receive the best quality care available including unqualified recognition of their rights, dignity, integrity and individuality;
- Continuous Quality Improvement (CQI) principles need to influence all aspects of personal care, domestic and management's practices.
- The responsibility for care requires careful planning based on the needs of individuals and their careers and on the available resources to meet such needs.
- The organisation will be structured in a way that ensures positive achievement of quality services and accountability;
- Every member of the organisation plays an important role in the achievement of successful outcomes;
- Staff participation, encouragement of creativity, communication and recognition will form the basis of delivering high quality multi-disciplinary services;
- We will employ staff with the correct skills to fulfill their roles and will invest in their further development to improve quality effectiveness and efficiency;
- Systems and policies that conform to government requirements will be used to ensure equity of access to services; and,
- Government establishes the broad policy and funding criteria for the delivery of health-related services and this creates an obligation to comply.
- The Organisation will as a minimum adhere to the Outcome Standards required by the Department of Health and Family Services.

MOVING IN TO CARE AT EDGARLEY – WHAT DO I BRING?

Once you have made the decision to move into care, what you should bring as a resident will depend on a number of factors.

Here, we provide an overview of what residents will need to bring with them when coming into care Edgarley whether that it is for respite care or permanent care.

RESPITE CARE:

Residents who move into Edgarley for respite care will need to bring enough clothes for their length of stay, toiletries and any other personal effects.

Edgarley will supply a bed, lockable bedside cupboard, chair and television.

Edgarley will also supply all linen for use for the period of time in care – ie. towels, face washers, sheets, pillow cases, blankets and bedspreads. However, respite care residents are welcome to bring their own linen, if they choose. There is a laundry service available to all Edgarley residents.

All meals over the period of care are provided for the resident by Edgarley, there is no need to bring food into the facility. However, if residents choose to bring food in, please see information in this booklet on food being brought in to Edgarley.

All cleaning of rooms and living areas will be undertaken by Edgarley during the period of care.

Residents will need to bring all their medications and any other medical equipment or aids they require. Please ensure all items brought in to Edgarley are clearly named.

PERMANENT CARE:

Residents coming in to Edgarley as permanent care residents will need to bring clothes, toiletries and any other personal effects they wish to bring to make their room comfortable and suitable for them. An indication of what some of these items may include is included in the information in this booklet.

Edgarley will supply a bed, lockable bedside cupboard and chair, and will also supply all linen, ie. towels, face washers, sheets, pillow cases, blankets and bedspreads. Residents are welcome to bring their own linen if they choose. Edgarley provides a laundry service to residents, or there is a laundry available for residents to use.

Edgarley will provide all meals for residents during their time in care. Edgarley will undertake all cleaning of rooms and living areas, but residents do have some responsibilities in this area, please see the notes in this booklet.

RESIDENT INFORMATION

The following information is provided (alphabetically) to give residents and their families a general understanding of operations at Edgarley and how that impacts on them as residents. This includes an overview of standards residents can expect Edgarley to meet, and standards residents are expected to meet in terms of living arrangements, care needs, activities and other day-to-day information.

ACCOUNTS:

Accounts for care will be issued either fortnightly or monthly. Accounts are to be paid for via direct debit to Edgarley. Accounts are issued in advance. Direct debit arrangements for payment of accounts is discussed and set up at the admission meeting between residents and their families and Edgarley staff. Further information on financial aspects of care are included in this booklet on pages 18-23.

ACCREDITATION PROCESS:

Edgarley is an accredited aged care facility under the Federal Government body, Australian Aged Care Quality Agency. Edgarley is required to maintain this accreditation under the Aged Care Act. Accreditation audits occur every three years. At any given time, Edgarley can be subjected to unannounced 'spot checks' as part of this accreditation and auditing process. Residents and/or family representatives will be notified when Edgarley will be undertaking an audit by the agency and residents and family members have the right to meet with assessors at this time.

ACTIVITIES:

Edgarley Assisted Living provides residents with daily activity sessions, Monday through to Friday, created in consultation with the activities co-ordinator and staff to ensure they remain engaging for all residents.

These activity sessions include, but not limited to, bingo, craft, games, musical entertainment, outings, trips, exercise classes, cooking, gardening etc.

A monthly calendar of activities is included in our monthly newsletter, published and distributed to residents at the end of each month.

Edgarley also has its own bus for transporting residents to various activities and outings within and surrounding the Casterton community to ensure residents have the opportunity to be part of the broader community while in aged care.

Additionally, card sessions are held each Tuesday from 1.30pm. Residents and the member of the wider community are welcome to join this group.

ADMISSION:

Admission is strictly between 10am and 12pm, Monday to Friday. The admission process will take approximately ONE HOUR. At this time, baseline medical information will be taken, a range of consent forms will be completed, together with account/financial forms. All Medicare, concession, DVA, etc cards should also be brought to this meeting to assist this process. It is advised incoming residents have a family member or representative with them for this meeting.

Please note: At this admission meeting, a terminal care plan will be completed. This can be an emotional and difficult process but one which must be completed to ensure Edgarley can provide appropriate care for the resident when the time arrives.

ALCOHOL:

Residents are welcome to enjoy an alcoholic beverage while on site. Residents are requested to be moderate in their consumption of alcohol. In some instances, resident's consumption of alcohol maybe restricted or banned. This decision is at the discretion of the Director of Nursing and/or senior care staff members.

ADVANCED CARE PLANNING:

Advanced care planning is mandatory at Edgarley Assisted Living and will be completed on admissions. Edgarley has trained staff members who will guide you through the process and will make appointment times to meet with all concerned to discuss the procedure of advanced care planning.

ALLIED HEALTH:

Edgarley has a number of contractual arrangements with visiting allied health professionals. Allied health professionals include, but are not limited to; podiatry, physiotherapy, dietician, continence, stoma therapist, speech therapist and others as they are required.

Residents can have an allied health professional of their choice visit the facility or they can travel off site for an appointment.

It is not the responsibility of Edgarley Assisted Living to transport residents to off-site appointments. Depending on the classification of the resident (ie. care level) residents may be charged for any transportation services.

BULLYING:

Edgarley Assisted Living expects that any persons who attend its workplace, program or service or any reason is required to behave in an appropriate and respectful manner.

Edgarley will take appropriate actions to investigate and address any incidents relating to occupational violence and aggression – this includes residents, staff and visitors to Edgarley (including family and friends, allied health and service providers).

All persons onsite at Edgarley are required to:

- Behave appropriately
- Promote a climate of mutual respect
- Report any concerns or breaches immediately, and
- Maintain confidentiality concerning any complaint or investigation

CHURCH SERVICES:

Church services are conducted on a regular basis. Times and dates of the services are included in our monthly newsletter. Edgarley respects the rights of all residents to undertake their religion, beliefs or spiritual practices and will endeavour to cater for individual choices.

CHEMICALS:

Due to legislation and regulations, residents are not permitted to bring chemicals into our facility. This includes not allowing residents to keep any chemicals in their rooms, and any chemicals on site must be stored in a locked cleaning room. This includes a number of chemicals residents living at home may take for granted including: Insect sprays, air fresheners, cleaning products, washing products, aerosol sprays, liquid or cream chemicals.

Some of these regulations are in place to take into consideration the impact some chemical products have on other residents and staff.

CLEANLINESS OF ROOMS & REFUSE:

Residents are encouraged to keep their rooms in an orderly manner. Edgarley staff can maintain tidiness if residents are unable to maintain it themselves. When coming into Edgarley as a resident, consider that too much furniture can be a safety risk to you as the resident, and also may prevent domestic staff from maintaining the room to appropriate standards.

Please ensure food scraps and the like are placed in a garbage bin. Newspapers etc. should be placed next to rubbish bins for disposal by domestic staff.

COMMENTS/SUGGESTIONS/QUERIES/CONCERNS:

Residents and relatives are encouraged to openly discuss any suggestions, queries, problems or concerns with the supervisor, Director of Nursing, Chief Executive Officer or another Edgarley staff member.

COMMENTS/SUGGESTIONS/QUERIES/CONCERNS (cont.):

There are a number of ways in which issues can be raised.

- Residents can raise issues or concerns at the monthly resident's meetings, chaired by the CEO. Meeting information is provided in the monthly newsletter.
- Residents and their representatives may use the 'We Welcome your Comments' feedback forms. These are available from brochure stations located at: the front office, Edgarley foyer, Cheers & William Anderson dining areas, and the entrance to the Coulter wing. Completed forms should be placed in the suggestion boxes located in the Edgarley Reception Area and William Anderson dining area.
- Once lodged, residents' issues, concerns or complaints will be acted upon, treated in confidence and with no form of reprisal. It is important to us at Edgarley that resident concerns and queries are dealt with in a prompt and efficient manner to ensure a continued happy, safe and secure environment.
- Alternatively, if the resident or their representative feels he issue is of a serious matter and cannot be raised with Edgarley staff, the Board Chairman can be contacted directly. Contact details for the chairman are available from the administration staff. Residents also have the right to seek assistance from outside agencies if they feel their issues are not being addressed.

COMMITMENT TO CONTINUOUS IMPROVEMENT:

The Edgarley Quality Management Committee oversees the continuous improvement program and ensures Edgarley, as a business, strives to improve all aspects of our service, systems, processes and care to our residents. We actively encourage and welcome participation and involvement of residents and family representatives in the continuous improvement process. Part of this continuous improvement program includes a variety of tools to identify areas of improvement. These include: audits, surveys, questionnaires, resident and representative comments and complaints forms, opportunity for improvement forms, various meetings, maintenance, and hazard and incident reports.

DOCTOR'S VISITS:

A doctor will visit residents at Edgarley twice a week. Currently this occurs on Mondays and Thursdays, however, this may vary or be cancelled due to unforeseen circumstances.

Residents have the right to be treated by their own doctor. However, if residents choose to see their regular doctor (if this is not the visiting doctor) it is the responsibility of the resident and/or their family to arrange transport to this medical appointment. Edgarley staff are not available to transport residents to these appointments. **Should transport by a staff member be required, residents will be charged at a rate of \$50/hr from when staff leave Edgarley until their return.**

Residents have access to trained nursing staff 24 hours a day, 7 days a week at Edgarley who can treat medical condition and liaise with a doctor or arrange ambulance transport if required.

DRESS:

Residents are requested to be respectably and fully dressed at all times. Residents and families are encouraged to liaise with the nursing staff/team leaders as necessary to ensure suitable clothing is provided for the resident. All clothing laundered by Edgarley will have heat-sealed labels attached to ensure clothing is returned to the correct resident. *See: Laundering of personal clothing.*

ELECTRICAL ITEMS:

All electrical items brought into the facility must be checked and tagged by a qualified Edgarley staff member or their appointed contractor.

Residents may have fridges in their rooms but it will be at the discretion of the DON and care staff. Residents are able to use communal fridges where staff will label and check food daily.

Residents cannot use electrical blow heaters as they are considered a fire safety hazard. If residents wish to have a heater in their room, an oil filled heater is recommended.

FIRE & OTHER EMERGENCIES:

Edgarley has an automatic fire detection system, which exists throughout the facility for your safety. The alarms automatically ring through the Casterton fire brigade (via an automatic process with the alarm monitoring company). Emergency service vehicles are dispatched within stipulated timeframes as part of this system.

In the unlikely event that a major emergency occurs necessitating evacuation, our staff members are trained in such procedures and an evacuation plan is set up for each area of the facility.

The fire alarm bells are tested every Friday morning.

FOOD REGISTER:

Any food brought into Edgarley must be recorded in a *Food Register Book* located in the Coulter, Edgarley and William Anderson wings.

These register books should be completed by friends and family to record food items brought into Edgarley which may pose a risk of food contamination.

For example – baked biscuits do not need to be registered; however, cakes, cream-filled sponges, seafood, pastry items etc, need to be registered in these books.

Should a food illness or contamination issue occur, this register assists staff identifying possible sources.

FURNITURE:

A beds and bedside cabinet are provided for residents in all rooms. A television antenna socket is installed in every room.

Residents may bring in whatever items of furniture they wish to have in their rooms. However, space is at a premium in rooms and safety of residents is of paramount importance.

Depending on whether residents are in an independent living unit or an individual room, it is suggested furniture should be limited to a lounge chair, television and stand, book shelf, and photographs.

GROUNDS & GARDENS:

The spacious grounds around Edgarley are there for the enjoyment of residents. Residents, their visitors and families, are encouraged to wander these grounds and enjoy the outdoors when weather permits. There are a number of shaded areas and garden seats available. The upkeep of these grounds and gardens is the responsibility of Edgarley. However, any resident wishing to be involved with gardening and tend to the garden beds is welcome to do so.

HAIR APPOINTMENTS:

Hairdressers visit Edgarley on a regular basis to provide haircuts, perms etc to residents.

Appointments for this service is made by Edgarley staff. Payment for this service must be made to the hairdresser on the day of the service. Residents or representatives are free to make appointments with other hairdressers. Residents may arrange for a different hairdresser to attend Edgarley if they choose but are responsible for arranging this themselves. If a resident chooses to attend a hair appointment outside of Edgarley, it is the responsibility of the resident and/or their family to arrange transport to this appointment. Edgarley staff cannot transport residents for these appointments.

INTIMACY:

Edgarley is committed to supporting the rights of the individual. These rights extend to maintaining or forming a relationship between consenting adults. All rights are respected irrespective of age or a person coming into an aged care facility. Friendship, companionship and emotions are a part of a person's life and lifestyle, and these needs will be respected.

Edgarley will also support residents with dementia and ensure their rights are respected and their safety and wellbeing is maintained. Family consultation may need to occur once a relationship begins to form.

With the development of any relationship, our residents' dignity and privacy will be respected and we will ensure the resident's emotional wellbeing is protected.

INSURANCE:

A resident's personal belongings are not covered under Edgarley Assisted Living's insurance policy. Please ensure that appropriate insurance coverage is sought to cover your own contents and personal property item.

LADIES AUXILIARY:

The Edgarley Ladies Auxiliary meet on a monthly basis to raise money for the provision of equipment or other nominated projects at Edgarley. The Auxiliary hosts a range of activities and events during the year and residents are welcome to join the auxiliary and/or attend any the functions.

The Ladies Auxiliary also provide a well-stocked trolley of personal items and snacks. Every Tuesday morning the trolley is taken through the facility to enable residents to purchase these.

LAUNDERING OF PERSONAL CLOTHING:

Edgarley provides a laundry service for all residents. This service is out-sourced to the local business, Casterton Laundromat. Laundry services are offered three times per week - Monday, Wednesday and Friday. All clothing items will be tagged by Edgarley staff with heat press laundry tags to ensure clothing is returned to the right person. There is a one-off cost for the supply of tags and placing the tags on the clothing. Please enquire at reception regarding the cost of this service.

Residents wishing to undertake their own laundry may do so in the resident's laundry located on the southern end of the Edgarley unit block. Note: washing powder cannot be kept in a residential room. A family member may also choose to take a resident's washing offsite.

If residents require an item to be dry cleaned, this can be arranged at a cost to the resident. Please see staff for details on this.

FAMILIES, GUESTS AND LEAVE OF ABSENCE:

Residents are welcome to have guests visit at all reasonable times. Lounge areas with tea/coffee making facilities are available for such use.

Residents are welcome to leave Edgarley for a social day out, overnight occasions or for health issues. An indemnity form regarding leave is signed on admission, however, staff should be made aware of any planned absences at least 24hr prior to allow for medications to be placed in webster packs for residents.

Day leave: Residents are able to leave the facility at any time for social visits or to go out on business. For safety reasons, staff should be personally informed of the destination and expected length of absence.

Overnight social leave: Residents may be absent from the facility on social leave for a period of 52 days in one financial year. If more days are taken financial implications can occur to resident fees.

FAMILIES, GUESTS AND LEAVE OF ABSENCE con't.):

However, for any social leave in excess 28 days in one block (or more than 52 days in a year) you must make prior arrangements with CEO/DON, if you wish to retain your place at Edgarley Assisted Living.

Hospital leave: If a resident is hospitalised, the resident's place in the home will be retained for the resident provided arrangements are made for continuing payment of fees. Hospital leave is unlimited.

FUNERAL SERVICES:

Edgarley Assisted Living can provide for residents to hold a full service and/or a wake on-site at our premises. Costs will be based on the requirements of the services requested. This can be discussed and arranged with the Director of Nursing.

LINEN:

Edgarley supplies all linen for residents. This includes sheets, blankets, bedspreads, pillow cases, towels and face washers. Residents are welcome to bring in their own linen if they choose, however, please ensure all items are clearly named.

MAIL:

Mail is delivered daily to Edgarley through Australia Post and distributed to residents by Edgarley administration staff. Residents can collect their mail from the front office if they wish. Edgarley staff can post letters for residents (at resident's expense) or residents can post their own letters in the mail box located at the front of Edgarley in Jackson Street. Mail is collected from the street mail box at 11.30am on weekdays by Australia Post.

MANDATORY REPORTING:

Edgarley and its staff have a legal obligation and responsibility to report all suspicions and allegations of abuse to the Police and the Department of Social Services within 24 hours of becoming aware of an issue.

The mandatory reporting process covers incidents of alleged assaults, poisoning, missing residents, gastroenteritis outbreaks, influenza outbreaks, and other incidents as outlined in Edgarley's Mandatory Reporting Policy,

Mandatory reporting must occur when there is a suspicion or allegation of abuse. This includes: a resident alleges that an assault has occurred; a staff member or volunteer observes an incident; a staff member or volunteer is suspicious of an incident occurring eg. resident distressed, clothing torn, bruising; family representatives have a suspicion or a resident is extremely fearful or wary of a particular person, staff member or other resident. All suspicions and allegations of abuse must be reported to the Supervisor/Director of Nursing/ Chief Executive Office immediately.

MEALS:

All meals prepared at Edgarley are made by qualified staff and all meal plans are overseen by a dietician, who visits and reviews these on a monthly basis or as required.

Residents are supplied with breakfast, lunch and dinner, morning and afternoon tea, and supper, daily with a choice of meals offered at these times.

Meals are prepared in the main kitchen area and delivered to dining room areas. The times for meals are clearly displayed in all dining room area.

Individual dietary requirements are catered for and these should be detailed on admission notes when the resident comes into Edgarley.

Any food kept in rooms must be stored in sealed containers. Residents should see staff for the storage of perishable foods as fridges are not permitted in residential rooms.

Visitors can arrange to have a meal with residents at the facility for a nominal charge. Please see Edgarley staff to arrange this.

MEDICATION:

Residents should bring all medication with them on admission. All medications handled by Edgarley staff are dispensed through the Webster System set up by the Casterton pharmacist. Incoming residents should arrange for a medication list be faxed or mailed to Edgarley by your current treating doctor prior to arrival to assist staff.

Residents can self-medicate if a Medical Officer has deemed the resident capable. A locked drawer will be provided in your room to keep medications in, this must be kept locked at all times. Residents must inform the Director of Nursing of all and any medications in their possession. Any medications/vitamins/herbal treatments brought into Edgarley must be written up in the medication chart. Out-of-date or unused medication is unsafe and must be disposed of correctly.

NEWSPAPERS:

Residents wishing to receive a newspaper or magazine may arrange for delivery through the local newsagent. All subscriptions are at the cost of the resident.

Edgarley distributes a monthly newsletter at the beginning of each month. Newsletters have information about upcoming events and planned activities for residents, together with pictures from the previous month's activities, and some great activities.

PALLIATIVE CARE:

Edgarley Assisted Living provides palliative care to all residents. Palliative care plans are developed individually for each resident when the time arises.

Edgarley has a palliative care team on staff consisting of qualified nursing staff. Palliative care plans are regularly reviewed by a doctor and family members are invited to participate with the resident's care plan.

At this time, residents receiving palliative care receive 1:1 care from Edgarley staff.

Edgarley will respect the resident's end of life wishes and will ensure residents pass away with dignity, respect and with effective pain management. A holistic approach will be taken to respect resident's values, beliefs and spiritual/cultural needs.

PETS:

Edgarley will allow residents to have pets move in with them, subject to approval of and at the discretion of the CEO/Director of Nursing.

Pets must be healthy, disease-free, vaccinated, vet-checked, well behaved, non-aggressive, must not disturb other residents or staff. Residents who have pets within the facility must also have an agreed care plan with Edgarley. This care plan will detail the resident being wholly responsible for the care and maintenance of the pet including: Maintaining, caring for and being responsible for all costs associated with the pet's care including food, bedding, yearly vaccinations, routine flea worm treatments; ensuring the pet behaves in a suitable manner; suitable arrangements for the pet if the resident is away for more than one day (this cannot be Edgarley staff); arrangements in place for the pet if the resident passes away;

In the event of a pet disturbing other residents or staff, the CEO and Director of Nursing will investigate and the resident may be asked to remove the pet from Edgarley.

PRIVACY POLICY:

Edgarley is committed to respecting the privacy of all residents' personal information.

Edgarley is bound by a set of National Privacy Principles and Victorian Health Privacy Principles which establish the benchmark for how personal information is handled. These principles have been embraced by Edgarley as part of its standard operating procedures.

All personal information given to Edgarley is dealt with in a uniform, strategic manner with the highest regard for maintaining the security of this information at all times.

Edgarley retains the following information about its residents -- date of birth, medical records/information and next of kin contact information, together with limited financial information. Only staff with appropriate levels of authority have access to this information. Staff are bound by strict confidentiality policies.

PRIVACY POLICY (con't.):

This information is retained to process applications for residency, assess the appropriate level of medical care and to make decisions on the level of funding a client is entitled to receive. Edgarley may, from time to time, disclose some of this personal information to the Commonwealth Government or its agencies. This will be undertaken in accordance with the provisions of the *Aged Care Act* or other relevant legislation, for the purpose of informing decision makers about funding and medical care. The Commonwealth Government is subject to laws relating to privacy and policies designed to safeguard personal information. It is Edgarley policy that all requests for access to information be made in writing. Please contact the Chief Executive Officer or Director of Nursing to arrange for access to information. Complaints in regards to privacy of information are taken seriously and we will be dealt with promptly. In some cases, we may require that you put your complaint in writing.

RESIDENTS' INDIVIDUAL CARE PLANNING:

After an initial settling in period of one week, residents will be assessed over 21 days by staff to determine their individual care needs. Using information gathered by staff and from the resident or their representative, a comprehensive care plan is developed to provide the best individualised care for the resident.

After the care plan is developed, the resident and/or their representative will be asked to review the plan and, if satisfied, will sign to that effect on a *care plan review form*. The resident's care plan is reviewed through a 'Resident of the Day' review process. This is a process of review where individual care plans for each resident is undertaken every two months or when an obvious need arises. The resident's next of kin is consulted when there is a Resident of the Day review, an annual care plan review and when there is any change to resident's care needs.

RESIDENT MEETINGS:

Resident meetings are held bi-monthly on the first Thursday of the month to discuss matters relating to life at Edgarley. A newsletter is created monthly and is provided to residents, their families and representatives and provide an insight into activities at Edgarley in the month prior, and upcoming activities and events.

SECURITY:

Edgarley operates seven days a week, 365 days a year, and has staff available 24 hours a day. External doors of the main buildings are opened daily from 6.30am and are locked each evening – at 6pm during winter and 8pm during day light saving.

SMOKING:

Smoking is not permitted inside any building of Edgarley. There are designated areas for residents who wish to smoke and these are clearly defined onsite. Edgarley's smoking policy is designed to respect the rights of residents who choose to smoke and provides areas where they can do so in safety. The policy also respects the rights of non-smokers, and smokers are requested to consider their fellow residents.

TELEPHONES:

Telephone connection points are installed in every bedroom. Residents can arrange to have a telephone connected in their room. This connection, provision of a telephone and associated costs are borne by the resident.

TOILETRIES:

Residents are supplied with basic toiletries including: talc, shampoo, conditioner, toothpaste and other personal items. Other toiletry items such as perfume and makeup, or preferred brands of basic toiletries, are to be brought in by the resident at their expense.

TRAINED STAFF:

Edgarley prides itself on having fully qualified staff who provide care to residents and can provide immediate care or medical assessments for all residents. In the majority of cases, medical treatment can be administered in the residents' own room or on site. Appropriately trained staff are on duty throughout the facility 24 hours a day, seven days a week, 365 days a year, together with our care assistants and volunteers.

As part of Edgarley's regular staffing, it has registered and enrolled nurses undertaking medical duties, with these and other staff trained in many aspects of health care including: aural and oral health, continence advisor, catheter insertion and care, wound care, ECG operation and monitoring and venepuncture.

TRANSPORT:

Edgarley has its own vehicles which are used to transport residents for planned events. Residents and/or their families are responsible for the transporting of the resident to/from Edgarley for appointments or personal events. Transport is only available to transport residents in special circumstances. A charge may be incurred for this transport as it requires a staff member to be absent for their duties at Edgarley can only be used to transport residents in special circumstances or for planned events. Resident's families are responsible for the transportation of the Resident to and/or from the facility for appointments etc. unless otherwise organised with the facility.

VALUABLES & MONEY:

All items brought in to Edgarley when a resident comes in to care should be listed on the *Valuable Items form* completed at the time of admission. If at any time during a residents' stay items any items are given away or sent home, a staff member must be notified so the *Valuable Items list* for the resident can be altered appropriately.

Residents may have money in their room, but they are responsible for its security. Alternatively, residents can utilise a petty cash system operated by Edgarley to manage cash amounts.

Any valuables or monies that are left in resident's rooms are done so at the residents own risk. Edgarley does not take any responsibility for any thefts unless it can be proven an Edgarley representative was responsible.

VISITING HOURS:

Visitors are permitted to visit residents at all reasonable times. Visitors are able to enter Edgarley through the main administration office or through the William Anderson Wing. Visitors sign the visitor's register and collect a visitor's pass. This allows Edgarley to identify visitors on the premises to ensure resident, staff and visitors safety and to enable the safe evacuation of all persons if there is an emergency.

VOLUNTEERS:

Edgarley has a number of volunteers who assist staff with a range of functions and activities, for example obtaining books from the library, reading to the visually impaired, assisting with shopping, undertaking interaction and conversation with residents and generally assisting with activities at Edgarley.

VOTING:

A polling booth is made available on the premises for ease of voting at election time. If a resident requires their name to be removed from the Electoral Roll, the resident or their representative must contact the Australian Electoral Commission.

YOUR HEALTH:

During your residency at Edgarley, your health will be carefully monitored and your level of care will be provided for and adjusted as required. If an adjustment in the level of care is required, this may also require a necessary move within Edgarley's care areas to enable us to provide the correct and appropriate care for your individual needs. This will be done in consultation with you, your family and any other representative you wish to be present.

LEAVING A DONATION IN YOUR WILL

Edgarley Assisted Living operates on a not-for-profit basis and aims to provide the best quality care and lifestyle for its residents.

Leaving a donation in your will or in lieu of flowers is a voluntary goodwill gesture some residents of Edgarley have chosen to do which assists Edgarley in continuing to provide high quality services to residents.

The decision to leave a donation in your Will is your own personal decision and is absolutely not requested of residents by Edgarley.

Edgarley does request this decision be made after consultation with your family and/or representative to ensure it is a decision you are comfortable with, one you personally wish to make, and one which does not cause family conflict.

On making this decision, you may have a specific donation amount in mind, or you may consider 'in lieu of flowers' to be part of funeral arrangements.

Specific donation amounts may be discussed with the Chief Executive Officer or Director of Nursing,

'In lieu of flowers' is a request made of mourners to donate to Edgarley instead of purchasing flowers at your funeral service. To assist with this, pre-prepared envelopes for this are available and are placed at the service for attendees.

Edgarley Assisted Living is incredibly appreciative of any donation a resident makes. Donations allow Edgarley to continue to provide better services and equipment for the residents in our care.

FINANCIAL CONSIDERATIONS WHEN ENTERING AGED CARE:

The following information is provided to give residents and their families a basic understanding of the many and varied financial and legal considerations and requirements when a person enters residential care. This information can seem overwhelming, lengthy and difficult to understand. The following information is provided as a guide only but may assist new residents with seeking out information prior to entering care and understanding the costs associated with entering care at Edgarley Assisted Living. If you have questions regarding any of this information, please contact the Chief Executive Officer for further explanation.

WHERE TO START:

It is recommended new residents seek assistance from appropriately qualified professionals to be fully informed about the financial considerations of the aged care industry before committing to a move. Please contact the Edgarley Assisted Living Chief Executive Officer to arrange an appointment and discuss your financial position as there are several options available and a suitable financial arrangement can be tailored to suit your requirements.

Information regarding moving into aged care can be found on the Federal Government website www.myagedcare.com.au or alternatively on www.edgarley.com

All incoming residents to Edgarley Assisted Living will need to complete the Centrelink form *Permanent Residential Aged Care Request for Combined Assets and Income Assessment*. This form outlines income, assets and liabilities and is the basis for our financial negotiations. The form can be found on the Centrelink website or is available from the Edgarley Assisted Living office.

The following information outlines the processes and financial requirements when entering care at Edgarley Assisted Living. If, at any time, you require this information explained, please contact the Chief Executive Officer.

AGED CARE ASSESSMENT:

The first step to move into an aged care facility is to have an aged care assessment undertaken. These assessments are conducted by an independent body (Aged Care Assessment Services) and determines a person's care needs and their ability to access Commonwealth funded residential care or respite care.

These assessment interviews cover a series of topics and include: any limitations, assistance, current medical diagnosis, living environment, cognitive and psychological behaviours, nutrition, mobility and other factors. The assessments involve a one on one meeting with a potential resident and it is highly recommended if the resident could be supported through this process by having a family representative with them during the interview.

An ACAS assessment will only need to be undertaken once. To arrange an ACAS assessment contact ACAS on 03 5561 9300 or go to the Myagedcare website and complete the process online.

AGED CARE APPROVAL:

Following the ACAS assessment, incoming residents will be approved for care as one or more of the following care services:

RESPITE CARE:

Respite is designed for people who require care for a shorter, less permanent reason, ie recovery from a hospital stay, a carer going away, and the requirement of some short-term assistance. Eligible persons are allocated approximately 63 days per financial year of respite care, dependent on their individual status (i.e pensioner, Department of Veterans Affairs (DVA) etc.) Respite care residents are classified as either low or high care. Respite residents will not be asked to pay any accommodation payments. Edgarley Assisted Living charges the daily care fee for respite care residents.

RESIDENTIAL CARE:

Residents are assessed as requiring permanent residential care by the ACAS process. There is no longer a classification of high or low care as the level of the care required will be determined through the Aged Care Funding Instrument (ACFI) conducted by Edgarley Assisted Living staff. This assessment is a set procedure defined by Medicare and Edgarley and is subject to independent audits to ensure Edgarley is applying the correct assessment criteria for each resident.

EDARLEY ASSISTED LIVING'S EQUITY STATEMENT:

Edgarley gives an undertaking, endorsed by the Edgarley Home Inc Board of Management, that no person requiring our services will be denied entry based on their financial position. Edgarley is a community-based organisation that exists to serve the community and it takes this guiding principle to heart.

If you require care, please contact Edgarley and to discuss your situation and reach an agreement that is suitable for all parties.

NEGOTIATION OF FEES:

Edgarley has a number of set fees in place to ensure quality care is provided to all of its residents. Some of these fees are set, some are determined by each individual's financial position and some are determined by supply and demand, the current market environments. Edgarley is open to, and will, negotiating with you the set fees to ensure a suitable arrangement for both parties can be achieved.

As part of the move into aged care, there is a requirement to establish the level of Refundable Accommodation Deposit (RAD) a resident may need to pay. *Please refer to information below for an explanation of RADS.* The level of RADS for Edgarley – set at \$300k and \$180k – is a maximum figure, and not what has to be paid.

To enable your transition into aged care, Edgarley will need to establish a level of RADS. While Edgarley has a set a RADS amount, this is not a set figure and we will negotiate with you to come to an arrangement suitable for both parties. Edgarley will always negotiate in good faith. Edgarley will always have its equity statement about providing care to all people, irrespective of their financial position, at the base of its negotiations.

UNDERSTANDING EDARLEY'S RESIDENTIAL CARE COSTS

The following information outlines the fee structures applied to incoming and existing residents of Edgarley Assisted Living.

DAILY CARE FEE:

The daily care fee is currently \$49.42 and is set by the Federal Government. All residents entering into an aged care facility anywhere in Australia, will pay the daily care fee. The fee is adjusted twice a year in line with pension increases.

REFUNDABLE ACCOMMODATION DEPOSITS (RAD):

All aged care facilities across Australia, by law, must determine a pricing for their rooms and lodge these prices on the Government's myagedcare website. Edgarley has determined the following prices: \$300k for rooms in the Edgarley, Cheers, LAW and William Anderson Wings, and \$180k for rooms in the Coulter Wing. These are the maximum amounts Edgarley can charge a resident. The final and total amount will be **negotiated between the facility and each resident and/or their representatives.**

If a resident chooses to make your payment as a lump sum, this is called a RAD. A RAD works like an interest-free loan to an aged care facility. The balance of the RAD is refunded to the resident or their estate, less any agreed amounts have been deducted, on leaving the facility.

The Federal Government, through Centrelink or Department of Veterans Affairs, will conduct an assessment of an individual's income and assets and they will advise the individual and the aged care facility the level of fees and charges required to be paid. If this assessment requires a resident to pay for accommodation, there is a number of choices as to how that will be paid.

Residents can choose to pay the accommodation payment as a lump sum payment (RAD), a payment schedule (DAP) or a combination of the two.

If a resident is required to pay an accommodation payment, they will have 28 days from the day they enter care to decide on the payment method. Aged care facilities cannot refuse you a place based on how you want to pay for your accommodation.

Until the ongoing payment method is decided, residents will be charged Daily Accommodation Payments while in care.

DAILY ACCOMMODATION PAYMENTS (DAP):

Based on Edgarley Assisted Living's RADs of \$300k and \$180k, the DAPS equates to \$54.98 per day and \$32.99 per day, respectively.

Instead of paying for accommodation as a lump sum, residents can choose to pay this accommodation charge as periodic payments. The amount charged is based on a daily rate, known as the Daily Accommodation Payment (DAP). Edgarley invoices residents for DAPs on a fortnightly basis and may be charged one month in advance. DAPs are not refundable if a resident leaves Edgarley. DAPs paid in advance will be returned on departure.

Residents may choose a combination approach to paying the total RAD amount. This means residents may choose to make these DAPs out of the lump sum RAD amount. This will mean that the total amount in your RAD will be reduced over time as your DAP is deducted and reduce total funds returned to the resident or Estate on leaving Edgarley.

As the RAD is reduced, Edgarley Assisted Living may ask residents to 'top up' their RAD or pay a higher daily accommodation payment during the course of care. The following calculations are a guide to how this may impact your RAD:

RAD and DAP Calculations:

RAD = \$300,000

DAP Calculation – RAD x Maximum Permissible Interest Rate (MPIR) / 365

= \$300,000 x 6.6% / 365

= 54.25 per day.

RAD = \$180,000

= \$180,000 x 6.6% / 365

= \$32.55

REFUNDABLE ACCOMMODATION CONTRIBUTIONS (RAC):

This payment is similar to a RAD, but applies only when a person who is receiving Australia Government assistance with their accommodations costs, makes a financial contribution towards their accommodations costs.

DAILY ACCOMMODATION CONTRIBUTION (DAC):

This is the contribution residents would need to pay, if they are also receiving Australian Government assistance costs. This amount equates to the Daily Accommodation Payment, less the Government assistant amount.

MAXIMUM PERMISSIBLE INTEREST RATE (MPIR):

The MPIR is set by the federal government and is the maximum interest rate a facility may charge on RAD and/or DAP outstanding monies. If this charge is to be used, Edgarley can negotiate with a resident to determine a rate acceptable to both parties. The MPIR is altered in line with pension payments reviews that occur twice per year. The MPIR is reviewed on a quarterly basis and can vary in any given year.

MEANS TESTED CARE FEE:

This refers to an extra contribution towards the cost of care that residents may need to pay, on top of the daily care fee. The means-tested fee is based on an income and assets assessment undertaken by Centrelink through its Permanent Resident Aged Care Request for a Combined Assets and Income Assessment form.

COMBINATION PAYMENT:

Residents can choose to pay for their accommodation as a part lump-sum RAD and part DAP. The DAP can be deducted from the RAD. The same applies to the payments of RACs and DACs. Please refer to the specific parts of this financial information for clarification.

INCOME AND ASSET ASSESSMENT:

Any person entering an aged care facility in Australia will need to complete The Residential Aged Care Request for a Combined Assets and Income Assessment form. A copy is attached to this document. You may seek assistance with this form through Centrelink or the Department of Veteran Affairs.

ANNUAL AND LIFETIME CAPS:

The Federal Government has caps in place for the maximum amount of money a resident will be charged each year for costs associated with residential care. Details of these capped amounts are explained below:

ANNUAL AND LIFETIME CAPS con't.):

Annual Cap: The maximum means-tested care fee a resident can be asked to pay each year is \$25,000. This cap amount is indexed. Once this cap is reached, a resident cannot be asked to pay any more means-tested care fees until the next anniversary of the date of their first entry into an aged care facility.

Lifetime Cap: The maximum means-tested care fee a resident can be asked to pay is \$60,000 in their lifetime. This cap is indexed. When a resident has reached this lifetime cap, they cannot be asked to pay any more means-tested care fees.

NOTE: The annual cap may see some residents paying fees and then stopping for a period of time during a year; paying again when their care anniversary comes around, then stopping for the remainder of the year; or starting to pay again an stopping once the resident reaches their lifetime cap.

EXTRA SERVICES:

Aged Care facilities may choose to negotiate with residents to provide extra or higher standards of service. These may include upgraded accommodation, hairdressing, pay TV in rooms, exclusive menus or a range of other services. If and when Edgarley Assisted Living chooses to offer these services to residents, residents will be advised.

SUPPORTED RESIDENTS:

Any resident who is deemed to have assets valued below \$40,500 and an income below \$22,701 is a fully supported resident.

Once the assets or income exceed these thresholds assessments as outlined in these financial pages will come into place. The government will pay the difference between the resident contribution and up to \$50 as supplement.

NON-SUPPORTED RESIDENTS:

Non-supported residents are those residents who have assets above \$40,500 and income above \$22,701. The following formula is utilised when determining the costs charged to incoming residents.

50 cents per dollar above \$22,701.

17.5% of assets between \$40,500 - \$144,500.

SELF FUNDED RETIREES:

Care contributions are income and asset-tested. Residents can be asked to pay more than their cash flow and there is no daily limit, however, the maximum cap limits of \$25,000 (annual cap) and \$60,000 (lifetime cap) will apply.

RESIDENTIAL AGREEMENTS:

Residents will be required to enter into a signed agreement with their Edgarley Assisted Living upon entering care. The agreement will set out all the rights and responsibilities of the residents and Edgarley, along with all financial arrangements for the duration of a resident's stay. A copy of this signed agreement will be given to the resident.

DISCLAIMER:

This document is to provide information and to act as a guide only. It is not to be relied upon in making of any decision by any person. The information provided in this document is based on current advice from the Department of Social Services. The contents of the information may change from time to time and it is up to the individual to make themselves available of up to date information.

Before any person, reading this document, decides to move into aged care, they must seek their own independent advice.

ALL INCOMING RESIDENTS SHOULD SEEK PROFESSIONAL ADVICE:

The payment method which is most suitable for each resident will depend on their own personal and financial situation. Edgarley Assisted Living strongly recommends prospective residents seek professional advice from an appropriately qualified person (for example financial adviser, bank advisor, accountant, lawyer) before making a decision on which payment option they choose when entering aged care with Edgarley Assisted Living, or any aged care facility. Researching the option that best suits an individual's circumstance will make the process of moving into care more enjoyable and without any complications.

Steven Toope
CEO

ATTACHMENTS:

INVESTMENT POLICY AND STRATEGY FOR THE MANAGEMENT OF RESIDENT BONDS OR RADs:

(In these policies or statements bonds means either bonds or RAD's)

PURPOSE:

This Investment Policy and Strategy stipulates the mandatory requirements for the management of Edgarley Home Incorporated (trading as Edgarley Assisted Living) resident's accommodation bonds. All investment activities shall be exercised with due care, diligence and undertaken in a prudent manner.

Edgarley will not engage in any speculative investment activity or participate in schemes that are considered to be high risk or that expose the original principal sum to undue investment risk or potential loss.

The policy is intended to safeguard Edgarley's cash and investments portfolio, strive to achieve appropriate earnings and manage cash resources to ensure sufficient liquidity to meet its obligations and requirements.

The policy reinforces Edgarley's ongoing commitment to maintain a conservative risk and return investment portfolio as an important component of its ongoing prudent financial management practices.

The policy is intended to conform to Edgarley's financial position and financial commitments, current legislative constraints and specifies our investment goals for the forthcoming years.

SCOPE:

Investment of funds is carried out under the guidance and approval of the Edgarley Home Incorporated Board of Management (the Board), through the Finance Sub-Committee. This policy applies to all managers, employees and sub-committee members who actively manage the investment funds or have the responsibility for employees who actively manage the investment funds.

All investments will be under the direct control of the Board unless this task is properly delegated or outsourced. The outsourcing of investments must be approved by a 75% majority vote of the Board or can be delegated to an appropriately licensed financial advisor as moved by a 75% majority of the Board. The motion and vote is to be recorded in the Board minutes.

INVESTMENT CONTROLS:

The following internal control practices are in place to ensure good governance and allow a transparent and clear investment performance measurement:

- Policy content
- Delegated authorities
- Monthly reporting
- Investment reviews
- External audit
- Annual meeting with financial institutions and external auditors

Edgarley Assisted Living will maintain an appropriate level of fraud insurance as reviewed by the Board on an annual basis.

POLICY CONTENT:

Investments must be limited to deposits or investments in products offered in the normal course of business by authorised deposit-taking institutions (ADI) as approved by the Australian Prudential Regulation Authority eg banks.

All investments will be limited to the following products offered by ADI's:

- Cash-including fixed interest term deposits, bonds
- Cash management trusts and

such investments are to be made in accordance with this policy, taking into consideration the following:

1. In determining appropriate investments the Board is to consider the allocated rating of the proposed investment, and, as a minimum must invest in ratings no lower than long term AA or equivalent;
2. Having a low expectation of negative returns in any twelve-month period
3. Having proper regard to the risks associated with the investments given EHI's objectives and cash flow requirements;
4. Having proper regard to the composition of Edgarley Home Incorporated's investment portfolio, including diversification of the investments;
5. Having proper regard to the liquidity of Edgarley Home Incorporated's investments, given its cash flow requirements,
6. Having proper regard to the ability of Edgarley Home Incorporated to meet its current and prospective liabilities, including potential resident bond refunds; and
7. Before investing in any particular asset, having due regard to the balance between risk and return so as to maximize the rate of return of Edgarley Home Incorporated's funds subject to an appropriate level of risk; and

In determining appropriate investments, the Board will be mindful of government guarantees that may cover deposits and cash management funds. Government guarantee arrangements may alter from time to time and the CEO is to monitor any changes and advise the Board of any guarantees that may cover any upcoming investments. Guarantee information will be included on the Statement of Investment sheet.

All investments will meet the legal requirements as outlined in the following Acts and Principles:

Aged Care Act 1997: Section 57, 17A, Division 8A of the User Rights Principles 1997

User Rights Amendment Act 2011: Schedule 1, Part 2

User Rights Principles 1997: Division 3, Subdivision 3.4

User Rights Principles 1997: Section 23.38A, 23.38B, 23.40, 23.42, 23.43 & 23.40(1)

DELEGATED AUTHORITIES:

The following process is to be adopted in investing funds of EHI and must be done so in accordance with the investment policy and strategy;

The CEO will prepare a statement of investment that includes amount to be invested, term of the investment, interest rate and name of financial institution. The statement is to be tabled at an Edgarley Home Incorporated finance sub-committee meeting for discussion. The investment, if recommended by the finance sub-committee, is submitted to the Board for their ratification. No investment can be made unless it is approved by the Board and duly minuted.

The CEO is responsible to ensure the investment is carried out as per the Board instructions.

Evidence of the investment will be tabled at the next available finance sub-committee meeting.

MEASUREMENT OF INVESTMENT PERFORMANCE:

Direct investments will be held through to maturity unless there is a need to access the investment. The decision to break an investment will be approved by the Board of Management or in certain urgent circumstances by the Chair of the Board, Chair of the Finance Sub-Committee and the CEO. This decision will be endorsed by the Board at its next meeting.

Investments will appear in the monthly financial statements, tabled at both the Finance and Board meetings.

DISCLOSURE STANDARDS FOR RESIDENTS:

A copy of this policy and strategy, together with a Disclosure Statement, will be sent to all existing residents of Edgarley Assisted Living and the new documentation will be included in Edgarley Assisted Living's Resident Admission Pack for their information. Within seven (7) days of a request by any resident who has previously paid a bond, EHI will deliver a current copy of this policy.

REVIEW OF INVESTMENT POLICY AND STRATEGY:

This policy shall be reviewed by the Board annually and within a reasonable timeframe after the occurrence of one of the following events;

- If there is a change to the executive decision makers
- If there is a change in key personnel with responsibilities for managing accommodation bonds
- If there is a change in the objectives of the investments
- If there is a significant devaluation of any of the financial products invested in.

AMENDMENTS:

Any amendments to this policy will require approval by 75% of the Board.

AGED CARE ACCOMMODATION BONDS DISCLOSURE TO RESIDENTS (EXISTING AND NEW) AND FAMILY REPRESENTATIVES:

Edgarley Home Incorporated (EHI) is the approved provider for Edgarley Assisted Living Under the Aged Care Act 1997 (The Act), residents and prospective residents or their representatives are entitled to receive particular information from their approved provider on request.

This includes, in relation to the previous financial year;

- A summary of the permitted uses for which we have used accommodation bonds
- Information about whether we complied with requirements for permitted uses of accommodation bonds and with the prudential requirements for accommodation bonds
- Information about the number of accommodation bond balances (if any) that were not refunded in accordance with the timeframes set by the Act. For entry contributions (payable before 1997), information about the number (if any) that were not refunded in accordance with the entry contribution agreement
- A copy of the independent audit opinion on our compliance with the prudential requirements for accommodations bonds.
- Our most recent statement of audited accounts
- Liquidity statement

We must also provide;

- If you have already paid an accommodation bond, a copy of your entry bond register

- From the 1st February 2012, if we invest accommodations bonds in particular kinds of permitted financial products, our investment objectives and the asset classes we may invest in.

Residents, prospective residents or their representatives may request any or all of the available information. We must provide the information within seven days of the request, and the information must be correct at the time of the request.

If you wish to request any information or seek further clarification please contact the CEO on 03 5581 1211.

More details are contained in Sections 23.42 & 23.43 OF THE Users Rights Principles, available from www.commonlaw.gov.au

PERMITTED USE OF ACCOMMODATION BONDS SUMMARY:

To the Resident and/or Family Representative:

Edgarley Home Incorporated investments are governed by our Investment Policy and Strategy and we can confirm all investments are made in accordance with this policy. All investments will be limited to the following products offered by Authorised Deposit Taking Institutions (ADIs):
Cash – including fixed interest term deposits and bonds
Cash management trusts

Edgarley uses resident's bond monies for investment purposes only and does not use resident's bond monies for any other purposes. Edgarley does use the interest received from the bond investments as the Board determines in its overall financial management.

Edgarley confirms it has refunded all required bond balances in accordance with timeframes stipulated by the Aged Care Act197 (as updated and amended from time to time) and refunded all entry contributions in accordance with their respective agreements.

A copy of our independent audit opinion on our compliance with the prudential requirements for accommodation a bond will be sent to you after entry into Edgarley Assisted Living.

Our most recent audited financial statement and our latest liquidity statement will be forwarded to you after entry into Edgarley Assisted Living.

If you have already paid an accommodation bond, we provide a copy of your entry bond register, Prudential Statement and our audited end of year financial statements on a yearly basis. If you require any of these documents at any other time during the year, please do not hesitate to request a copy.