

Message from the CEO

Welcome to 2024 everyone. While I know it is very much still out there, it is so refreshing to be starting a year without every conversation starting with how to best manage COVID-19. Having travelled over recent weeks, it's clear that with vaccinations and boosters COVID-19 is now just another illness we live with, knowing however that those with compromised health need to take it seriously. What our focus now needs to be, is encouraging those unwell, or with compromised health, or who have had contact with unwell people, to wear masks when in close contact with multiple people. The exciting start to 2024 is the commencement of construction of the Totara Wing. An outline of the expected timeframe for work is included and progress will be tracked in subsequent newsletters. We have started a weekly memo update, circulated to those living closest to the construction site. However, even with the very best efforts to communicate I know and acknowledge the impact this is going to have on residents close by and sincerely thank you for your tolerance. Here's to a healthy and happy year – go well everyone.

Wendy

New Residents

A warm welcome to recent and almost here residents –

- ☺ Barbara Clark – Midlands Gardens
- ☺ Ralph & Lyn Martin – Midlands Gardens
- ☺ Anne Burkinshaw - Sevenoaks

Introducing new Managers

It's with great pleasure that we welcomed two new managers to the Trust late last year.

Duncan Chamberlain - Refurbishment Manager. Duncan's appointment late last year

enabled him to work with retiring manager Steve Lewis for some weeks before Steve left. This has meant he now has a thorough working knowledge of the role and has been able to seamlessly take over from Steve. Duncan is a registered master builder and has a lifetime of experience in construction including running his own business. It's great to have him on-board.

Sinan Kose – With the leaving of Glynis Seed late November we consider ourselves very fortunate in been able to employ Sinan as our executive chef. The reports received regarding the food being prepared by Sinan, especially over the Christmas/New year period have been so positive and he has lots of fresh ideas, especially around the use of seasonal produce. Sinan has been in New Zealand for 10 years; his home country being Turkey where he held senior chef roles in the hospitality industry. Since being in NZ he has run his own business along with working in aged care facilities in both Auckland and the Wairarapa.

Canada Geese–Midlands Garden

We are very aware of the health and safety issues the current number of Canada Geese around the Midlands Gardens lakes are causing. There have been a variety of measures taken to try and move them from the lakes but with very limited success. Further measures are planned. Please know there is total support from management to



solve this significant problem but we must act within the law.

Totara Wing Update

Crowe Construction commenced the project on Monday 15 January 2024 with the site office and fencing being delivered. Below is a broad programme of construction work.



January

Their first tasks are to survey the site to confirm the exact location of the new Totara wing. This enables them to finalise how they will lay the site out, taking into account the need on site for a permanent site office and storage throughout the project and easy, safe access to the work site for goods, equipment and people. They will then be able to put up the site fencing to fully encircle the work site and commence the removal of remaining vegetation and the existing Kauri fence. This later work will involve some equipment on site and is likely to take through to the end of January.

February more extensive site preparation occurs. **This is expected to be the most noticeable work in terms of noise and vibration.** It includes; excavation of the site, back fill, compaction and piling. The compaction and piling will be the most disruptive period which is expected to occur **over a week** early in February. During this period, the movement of underground services is likely to occur.

March-June the foundation will be completed and frames will start to go up and

this will continue into April. Then the roof will commence and will continue through May and into June.

June and July will see the building closed in and clad.

August should see the last of the exterior work.

September – January 2025 focus on moving inside for the remainder of the project.

January – February 2025 – last stages being exterior landscaping.

Traffic Management for the Build

Road markings at Sevenoaks around the area of the new build have occurred with entrance into Rotary Place and the main carpark now one way. You



enter via the carpark and exit via Rotary Place. Parks in this area have been reduced and staff are being encouraged to park off-site until we have additional parks in place at the end of Bird Lane. It will no doubt be problematic at times but this too will pass.

Access to the Sevenoaks' Lake

For village residents, especially apartment residents, who regularly walk to the lake accessing it from Rotary Place, the pathway around the main carpark is now largely blocked off. Until all site preparation work is complete and the number of heavy vehicles and construction vehicles reduces to just builders on site, we strongly advise residents (particularly if using a walker) to avoid this area. In the meantime, alternative walks through the serenity garden off the apartments is a safe option.

Congratulations on Ministerial Appointment

On 19 December 2023 Health Minister Shane Reti announced the appointment of KRT

Board member Ken Whelan as the Crown observer for Health NZ - Te Whatu Ora.

Ken will be reporting directly to the Minister who said he was confident that the appointment of a Crown observer would help the Health NZ board and management to overcome a range of issues, including workforce shortages and hospital wait times.

This appointment recognises Ken's expertise and work history in our health environment and the great news is, despite adding this to an already busy professional life, Ken will stay on as a KRT Trustee. We are certainly extremely fortunate to have his health expertise on or Board.

To enable Ken to stay on the Board and to allow him to meet the commitments of this position, the monthly KRT Board meeting has been moved from the last Thursday of the month to the last Tuesday of the month. This has an unexpected advantage in that it means the Midlands Gardens recreation centre dining room which is the venue for these meetings, will now be free all day and allow morning preparation of the room for the monthly village dinner if needed.

Requests for Maintenance or Grounds' Support

Please don't interrupt maintenance or grounds staff when they are working. This is a safety issue. If you need them for any task, just phone through to the office on ☎️ (04) 297 0116 and ask that what you require is logged as a maintenance or grounds' request.



If there is an emergency, we have maintenance staff on call at all times. A call to the after-hours staff on the number above will enable them to call for assistance if it is needed.

Please note that there are times when the care staff do not answer the phone after hours. This is generally because they are busy responding to the care needs of our Lodge residents. You can leave a message, but, with emergencies, we also encourage you to keep calling until someone answers. We are upgrading our phones to make it easier for staff to have a phone on them and answer calls when they receive them.

Reminder

The beginning of the year is a time where we often have a proliferation of annual renewals for everything from contents insurance to membership of clubs and magazines. So many renewals are now done by way of email. It's not uncommon for such renewal notices to find their way into spam/junk folders or even quarantined by computer software as suspicious. It's important to check your spam folder on a regular basis and particularly at this time of the year to ensure there aren't any significant emails in this folder.

Be Aware

As we finally get some warm and sunny weather, even though the village is a safe place, there are constantly people coming and going and unfortunately, there will always be those who are on the lookout for an opportunity. As such, remember to latch your security door (if you have one) and keep easy to grab valuables out of sight. Also, close your garage door (at least down to less than crawl space) during the day. Lock your front door if you are out gardening. Above all, be observant. If you see someone you don't know wandering by, say hello and ask if they are lost? (This way they will know they have been noticed).

If you have any sense of unease, call the office and we will follow up immediately.

Rubbish bins – Recreation Centres

Just a reminder please that the wheelie bins and recycle bins located outside both recreation centres are there for rubbish and bottles accumulated from the activities in the centres, not for general household rubbish of residents. Residents are free to choose which rubbish provider they want to contract to collect garbage but please keep the communal bins for recreation centre use.



Meeting Dates for your Diary

The approaching months will see the usual round of AGMs. Please note the following dates:

- 1) **Trust AGM** for residents who are financial members of the Trust - **Thursday 23 May, Sevenoaks** Recreation Centre 11am.
- 2) **Village Residents AGM** with the **Statutory Supervisor** – for all villa and apartment residents. **Thursday 30 May, Midlands Gardens** Recreation Centre at 11am. If you can't attend this meeting, please appoint a proxy.
- 3) **Village Residents' Association AGM** and **Social Committee AGMs** – dates to be advised.

Membership of Kapiti Retirement Trust

While Village residents do not have to belong to the Kapiti Retirement Trust, we most certainly welcome and value your membership. The annual subscription is currently \$20 with life membership set at \$200. Membership is **individually** based and has nothing to do with a joint or individually held Licence to Occupy on a villa or apartment.

Financial members of the Trust have the right to attend the AGM and vote on matters relating to the Trust and how it operates. An application form is available by phoning the office ☎ (04) 297 0116 and a form will be delivered to you. The AGM for the Trust occurs each year in May. For existing Trust members, the annual subscriptions invoices are sent out in the first quarter of the year.

Residents' Street Morning Teas

The management hosted street morning teas are scheduled for the **second Thursday** of the month and held in the respective Recreation Centres. They start at **10.15am**. Dates for 2024 are as follows:



Date	Area	Held at
8 Feb	Sevenoaks Court	Sevenoaks
14 Mar	Derwent Close	Midlands
11 Apr	Grantham Court	Sevenoaks
9 May	Somersby Ct/Cherwell Ct	Midlands
13 Jun	Marilyn Cl/Florence Way/Muriwai Court	Sevenoaks
11 Jul	New Residents	Sevenoaks
8 Aug	Southwell Court/Trent Dr	Midlands
12 Sep	Lloyd Place/Rotary Place/Bird Lane	Sevenoaks
10 Oct	Knightly Way	Midlands
14 Nov	Apartments	Aptm dining room

Village Security

Continuing from last year, our nightly security patrols are provided by local firm, *Eyes on Security*. They visit each site three times during the night with the first visit being a

“lockdown” one which includes some on-foot walks to check all areas. The second and third visits are quicker and mainly by way of a drive through.



If at any time you see anyone who shouldn't be on site who is acting suspiciously, please telephone the police 111. If however there is a concern at night that may warrant a call to the security patrol, you can contact *Eyes on Security* by phoning ☎ 027 660 5129.

Scams

Just a reminder that we've had reports telephone scammers are most definitely out there and making calls at all times of the day and evening. Don't give any personal information or access to any of your electronic devices to anyone who calls you on your landline or cellphone. **JUST HANG UP.**



Management Availability

All the management team work on having an 'open door'. For me, this means just that. If my office door is open (and it usually is) and I am there, then I am available. I can also come and see you in your villa/ apartment if you wish. A phone call to the office ☎ (04) 297 0116 is all it takes to organise this. If it is of use, as a Justice of the Peace (JP) I am always happy to assist with those identify forms, certified copies etc. This service remains one of few in life that is truly 'free'.

Rates Rebate

To be eligible, you can earn some income above your national



superannuation payments. However, the limits are still such that couples in a villa will still be ineligible for a rebate because the joint National Superannuation payment exceeds the income limits.

If you think you may be eligible and still haven't filled in the forms you will need copies of proof of income for all income received, other than your national superannuation, for the year **April 2022 to March 2023**. Also, details of the bank account where the rebate is to be paid.

All residents who think they may be eligible are encouraged to apply for the rebate as you can receive up to \$700 if you meet the criteria. Contact Heide in the office for assistance.

Emergency Management

In the case of village residents needing to collectively gather to evacuate from the village the gathering places are:

- Apartments & Sevenoaks' Village - for residents living in streets off Kapiti Road, gather in the carpark by the Nikau Club.
- Sevenoaks streets accessed via Sweetman Ave, gather in front of the Sevenoaks' Recreation Centre
- Midlands Gardens – by the flagpole at the front of the Recreation Centre
- Muriwai Ct – in front of the Muriwai Lounge

Vector Metering – Bluecurrent

Vector Metering is responsible for many of the smart electrical and gas meters in NZ. Consequently they are often called in by electrical or gas retailers to upgrade the meters to smart meters which provide electronic reading. It is possible that you may receive advice that a meter is being upgraded on your villa. This advice could come from Vector or Bluecurrent as Vector have recently changed their name to Bluecurrent. Please note that this is legitimate and they are authorised to undertake the meter upgrades.

Time Away from the Village

With life largely back to normal and once schools return, we know it can be a great time to take that summer holiday. Please remember if you are going to be away from the village overnight or longer, then phone the office ☎ (04) 297 0116 before you leave and let staff know. You will be asked when you will be returning. If you don't know please give an estimated time (eg "about two weeks").

Please also phone the office ☎ (04) 297 0116 when you get back to the village so that your return can be noted. It's also a good idea to let your emergency management street/group convenor know details of your time away.

The purpose is not to encroach on your privacy but rather, ensure we know who is at home in the village at any given time.

Annual Village Service Fee Review

You will receive an invitation to the annual service fees consultation meetings. Service fees are reviewed every year with effect 1 April. Consultation meetings this year are on **Wednesday 21 February.**

- **Villa** Service Fee at **11 am** at Midlands Recreation Centre
- **Apartment** Service Fees at **2 pm** in the Apartment East Lounge

Given their nature, these are just for village residents to attend. All are encouraged to attend and express your views.

We totally understand that when people are on fixed incomes, any increase for goods and services is a matter of concern. All residents prior to coming into the Village are made very aware of the way in which we operate the Village. That is, that the weekly service fee covers actual costs and residents share in these on an equitable basis.

There is a transparent process regarding consultation which occurs at the beginning of each year, prior to any increases which take effect from 1 April.



A **Hardship Policy** which deals with situations where people cannot manage the increase is also attached to remind people of how this operates. In assessing financial hardship, the bar is set alongside that which would happen if you were applying for a hardship allowance from WINZ. If you have any queries around this please make contact with Wendy or David. Any such discussions are of course confidential.



In Memoriam

Our sincere thoughts are with the family and friends of:

Bob Lyster

Variable Service Fee Policy – for Residents facing Financial Hardship

Sevenoaks – Midlands Gardens Retirement Village

POLICY

To provide for a situation where in proven cases of financial hardship, a village resident can remain in their villa/apartment without fear the Occupation Rights Agreement (ORA) will be terminated due to a financial inability to pay the weekly service fee.

Kapiti Retirement Trust (KRT) has a stated Policy of not fixing the service fee charged to all residents in its Sevenoaks-Midlands Gardens Retirement Village. The view of the KRT is that fixed fees are inequitable, given that new residents will pay more for exactly the same services received by those already in the village, simply due to the passage of time.

Objectives

- Kapiti Retirement Trust (KRT) is committed to an environment where residents know that financially, they are treated equitably for the services provided.
- That the weekly service fee is calculated on the basis of a breakeven, cost recovery annual budget.
- That in general, increases to the weekly village service fee will be in line with the CPI and take into account the annual adjustment to NZ Superannuation.
- That increases over and above the CPI which are directly applicable to the resident and cannot be controlled by KRT (for example, rates and insurance) will be passed on to village residents.
- That any shortfall in village operating expenditure, arising out of increased costs to the approved budget, shall be met in the current year by the Trust but such costs will be included in the setting of future budgets.
- That where a resident can prove financial hardship, there is a mechanism in place to deal with an increase in the weekly service fee.

Measuring Financial Hardship

In recognising that individuals have different measures in determining their financial position, there is no intention by KRT to unilaterally make a determination as to the financial hardship of a resident. Instead, the current figures applied by Government for NZ Superannuation – presently \$507.64/week for a single person or \$768.92 for a couple (2022 gross figures) will be used as a basis. If a resident(s) has additional income of more than 10% of this figure, they will not be eligible for the option of a deferred variable service fee.

Process

- For any resident who finds themselves in a position where they will experience genuine financial hardship, resulting from an increase in the weekly service fee, which is over and above the annual percentage adjustment to NZ Superannuation, the Trust will deal with this on a case-by-case basis.
- The first step being for the resident to speak to the GMSS to determine if they would be eligible for a variable service fee.

- Any resident(s) who meets this measure will, if they wish, have their weekly fee amended to only increase by the percentage of the annual adjustment to NZ Superannuation.
- Where there is insufficient income to pay more than this, an Agreement (see Appendix One) between the eligible resident(s) and KRT will be drawn up. This will:
 - Set the weekly service fee at a rate in line with the annual adjustment to NZ Superannuation, effective from 1 April each year.
 - Accumulate the annual increase over this amount, along with annual interest.
 - Interest will be charged on the daily balance at KRT's bank overdraft rate.
 - An annual statement will be sent to a resident in April each year showing the accumulated amount owing (including interest).
 - The final sum due will be payable on termination of the current ORA. This amount will be in addition to the retention due (and any other costs) as per the terms of the ORA held by the resident(s).
 - If a resident moves within the Village (eg transfers to an apartment) then, providing there is a surplus amount paid to the resident, any amount owing will be payable on settlement of the new accommodation. Any future variable fee will again be determined by whether the resident's income still makes them eligible for a variable service fee. If this occurs, then a new Agreement will be completed.
 - The Agreement will be signed by the resident(s) and the CEO and witnessed by **one** of the following as decided by the resident(s):
 - Their lawyer, accountant or financial advisor
 - Their EPOA for Property
 - Their Next of Kin
 - The Executor of their current will
- At any time, on giving written notice to KRT, the resident can pay the amount owing in full and revert to the current weekly service fee, adjusted annually.