



Abbeyfield Australia Strategic Plan 2010 – 2015

Abbeyfield Australia Limited
ABN 91 005 954 905 ACN 005 954 905
PO Box 1293 Collingwood VIC 3066
Tel: (03) 9419 8222 Fax: (03) 9419 8575
(e) admin@abbeyfield.org.au
(w) www.abbeyfield.org.au

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Introduction

This strategic plan was developed by the Board and management of Abbeyfield Australia Ltd following consultation and planning conducted during 2010.

The current process built on the outcomes of the Board's strategic planning forum held during February 2009 and involved:

- a review of the national contemporary social housing environment
- an analysis of federal, state and territory government policies and regulatory regimes
- discussions with sector peak bodies including the Community Housing Federation of Australia
- discussions with federal and state housing authorities
- Board planning days.

Our strategic plan is bold yet achievable. It establishes a new strategic direction for the Abbeyfield movement in Australia and complements a solid Abbeyfield Australia business plan.

We see a future in which we provide better services to our affiliated Abbeyfield Local Societies whilst growing nationally through collaboration.

This Strategic Plan was adopted by the Board of Abbeyfield Australia Ltd on Sunday 29 August 2010

This strategic plan should be read in conjunction with the Abbeyfield Australia business plan.

(This document is a abridged version of the strategic plan.)



Welcome to the future

The year is 2015, the AGM of Abbeyfield Australia is about to commence. Present at Abbeyfield Australia's recently renovated, spacious head office in Melbourne are Board members, Federal and State politicians, representatives from partnering organisations, the management team and a selection of committee members from Abbeyfield Houses throughout Australia. All have gathered to hear a review of progress over the past five years and to hear how Abbeyfield Australia will continue forward.

Since 2010 there has been a paradigm change in the way Abbeyfield Australia goes about providing social housing throughout Australia. The first of these significant changes was a decision by the Board, back in 2010, to change from a development model based on government owned housing stock in preference for a model which provided an equity stake for Abbeyfield Australia. Out went Abbeyfield Australia working alone and in came partnerships with governments, national philanthropics, house construction companies and finance companies. The new mantra became, 'working together to provide social housing.' Out went sporadic house construction to be replaced with programmed development and growth.

The results speak for themselves. In just four years Abbeyfield Australia has moved from overseeing 26 houses and aged care hostels (developed over 25 years) to overseeing 46 houses and having an equity stake in more than 20 of those houses. Abbeyfield Australia has moved from being financially strapped to financial strength. It has employed additional people to manage these projects, has improved its range of services to members, and has become a significant contributor to the national discussion on social housing.

The scenario above is not fictitious. It is the future of Abbeyfield Australia and this strategic plan becomes the document to guide the organisation towards that future. This strategic plan has been designed as a 'living' document. Not something to be placed into a drawer and forgotten; rather a document to be dissected, displayed and referred to at every Board meeting for the next five years. This strategic plan enables the Board of Abbeyfield Australia to hold the Chief Executive Officer accountable for outcomes and results.

The challenge for Abbeyfield Australia is in the execution. A strategic plan in itself does not ensure implementation. Execution requires the courage to adapt to an emerging and changing environment for social housing and the courage to do things differently so as to enable Abbeyfield Australia to fulfil its potential as a provider of housing to those in their retirement years.

The present

A proud history of Abbeyfield Australia

Abbeyfield Australia is a part of the world wide Abbeyfield movement encompassing 18 countries as diverse as the United Kingdom, Canada, New Zealand, Italy, Japan and South Africa. The Abbeyfield concept began in 1955 in the United Kingdom and today more than 9000 people in 850 houses throughout the world are provided with accommodation.

In Australia, the Abbeyfield concept has been broadened to include residential aged care, independent living units, housing for adults with a mild to moderate intellectual disability, respite care, as well as traditional Abbeyfield houses for older citizens.

Abbeyfield Australia has been operating since 1986 and in that time has facilitated 26 Abbeyfield houses and hostels providing accommodation for 260+ people. These houses have been constructed in a manner designed to ensure they remain a part of the community, thus providing residents with the opportunity to socialise both inside the house and in the wider community.

Abbeyfield Australia Ltd is a not for profit company limited by guarantee and a registered charitable entity.

Mission

Our mission is

Abbeyfield Australia assists communities to establish and to maintain affordable, secure and supportive group housing for people in need

Vision

At Abbeyfield Australia our vision is to:

Empower and enable communities to meet the needs of their members for affordable, secure and supportive group housing

Inherent in this vision are a number of aims:

- that accommodation be a part of the community
- that accommodation be secure and affordable
- that accommodation meet contemporary and emerging needs

These are the things all those involved with Abbeyfield Australia, Board Members, Management, partners and committees should be striving to achieve, everyday. Every goal, every strategy, every decision and every action by each person should be aligned with this vision.

Our values and principles

At Abbeyfield Australia our philosophy is to:

- provide appropriate, affordable group housing for people in need seeking companionship and support in a community in which they have links
- provide houses that are planned, designed and furnished to provide an environment which is homelike and provides safety, privacy and physical and personal security
- establish houses that are operated by community-based, volunteer committees on a non-profit basis, with the committee responsible for the day to-day operation of the house and the wellbeing of the residents and staff
- enable residents to participate in the management and decision making for each house
- ensure residents are independent, in control of their own lives and are provided with the information to enable them to retain their independence and freedom
- ensure residents, staff and volunteers have the knowledge and understanding to maintain an appropriate balance between individual and group rights and responsibilities
- ensure residents are able to enjoy independent relationships with family and friends and enjoy their own social, cultural, religious and leisure activities
- utilise effective management practices in relation to the administration, communication and human resource aspects of Abbeyfield Australia.



This is what we do well

Abbeyfield Australia is unique in that its expertise and experience is in providing group housing for people in their retirement; people that are largely independent and that seek social interaction, and people with an intellectual disAbility.

Abbeyfield Australia is a unique provider of social housing in Australia and possesses depth of knowledge and understanding of group housing. Abbeyfield Australia is one of the few social housing providers to have a presence in almost all Australian states and territories.

Our knowledge and practical understanding of community based group housing and gives us with the strength to become an influential contributor to the national social housing discussion, and to be a contributor to the development of housing stock throughout Australia.

Structure and governance

Abbeyfield Australia is governed by an honorary skills based Board. Board members for 2009 -2010 are:

- • Gay Gardner AM - Chairman
- • Dimitri Kiriacoulacos
- • Alison Hancock
- • Jill Parker
- • David Kay
- • Andrew Dixon
- • Francis Duffy
- • Wanda Edmonds
- • Leo Hurst
- • John Lawrence
- • Jacquelyn Landos



Operational management of Abbeyfield Australia is vested in the Chief Executive Officer, Chris Reside.

The emerging environment

Political aspects

The population of Australia is ageing at an unprecedented rate. A quarter of Australia's population is currently moving into retirement, while at the same time people are living longer due to changes in medical science and standards of living. Approximately four million retired and ageing people will require accommodation in Australia over the next 2-3 decades.

Governments are acutely aware of the ageing crisis and understand that the cost and the availability of housing will become a bigger societal issue.

All governments are aware of the voting power of some 25 per cent of the population; they are also aware of the 'emotional tug' that occurs in the electorate when elderly constituents appear to be disadvantaged. Every voter has elderly parents or is moving into retirement.

The Commonwealth and State Governments are bulk providers of social housing, often in their own right and sometimes in partnership with recognised housing providers. Each State has its own process for accrediting housing providers. There is some movement in the Commonwealth towards establishing a national scheme for regulation of the not-for-profit social housing sector. Abbeyfield Australia generally sits outside the regulatory framework for registered housing providers though is a registered housing provider in New South Wales.

While there are some 2000+ housing providers throughout Australia, only a small number have a planned growth strategy. While the registration process differs from State to State, registration does bring a housing provider into the regulatory environment and therefore subject to external compliance reporting. Because of this, registration does carry some benefit in potentially increasing access to Government funding.

Victoria appears to have the most robust process for registration. Housing providers throughout Australia appear to be relatively passive in their role.

Many registered housing providers are simply fulfilling the role of landlord for property owners such as church charities and various branches of Government or are simply taking over the management of existing rental stock. The impact of this is that there is insignificant investment in new housing stock. The University of NSW estimated that there were around 400,000 social housing dwellings throughout Australia; representing just five per cent of dwellings.

Australia has a rather old-fashioned perspective of house ownership, based around the owner-occupier or single rental tenants. There is little in the way of Government policy to encourage alternative forms of housing such as shared ownership, cluster housing or the use of private investment instruments. Similarly there is little policy incentive at Local Government level for more creative use of land for social housing.

Economic aspects

There are two funding aspects of social housing. The first is the cost of construction and the second is maintaining physical assets and providing support services. Funding for construction may come from a variety of sources including Government funding bodies, philanthropic trusts and other partnerships. Funding for ongoing costs is covered by rental payments by residents.

Abbeyfield Australia currently gains the majority of its income from an affiliation levy paid by every affiliated local society. For Abbeyfield Australia to remain viable it needs a planned approach to developing additional houses. Failure to develop new houses means income is restricted to a total of the member fees and the occasional development fee.

Land and construction costs continue to rise especially in metropolitan areas. Yet these may be the areas of greatest need. There is likely a limit to the supply of council-owned land that may be donated to social housing projects.

Currently residents' rental payments are based on 70 per cent of the aged pension or disability support pension, plus 100 per cent of the Commonwealth Rent Assistance (CRA). This model requires a high level of occupancy in each house to ensure the level of revenue is sufficient to cover costs and provide retained earnings for ongoing maintenance.

Annual affiliation levies paid to Abbeyfield Australia are virtually static and barely sufficient to cover Abbeyfield Australia's operating costs.

Abbeyfield houses and hostels are essentially 'owned' by each respective local community, with decision making centred on each house. The impact of this is that each house is a 'silo' in that it remains focussed almost entirely upon its own daily survival and contributes little towards ongoing growth and development of the Abbeyfield model.

Social aspects

The population of Australia is ageing at its fastest rate ever. From 2011 onwards the first of the 'baby boomer' group will enter aged care. This group represents a quarter of the population.



People prefer to remain active and independent within their community for as long as possible while having the option of respite and community care packages. However those who are unable or unwilling to remain in their own homes have a choice of public rentals, private rentals through a housing provider such as Abbeyfield, residential aged care, or a retirement facility. Where people live often depends less on their personal choice and more on their ability to pay either an incoming bond and/or rentals.

Baby Boomers have different expectations to previous generations. They will be better educated, more widely travelled, seek greater variety in leisure activities and choices of food and they will value their independence. It is likely they will seek greater flexibility of living arrangements. Many will bring their own entertainment with them in the form of online access. Online social networking tools will enable residents to have greater access with others. Many may seek accommodation where they can come and go, take a holiday or perhaps park a motor vehicle.

The price of public rent continues to rise, brought about by increasing demand for rental properties, a shortage of quality rental properties and increasing construction costs. While about 70% of Australian's own their own home, the remaining 30% do not. Even amongst those home owners, an increasing number of ageing people are faced with the dilemma of choosing to live alone in a family home, sell and move into a retirement facility, renting, or moving into residential aged care. Those choosing to rent are faced with competition from later generations, the majority of whom also rent.

Many community housing complexes and metropolitan public rentals are in high-rise buildings or compounds. These create issues of safety, privacy and access. In rural areas the only option may be a house for rent. In many instances people have to work with unscrupulous landlords. Australian Bureau of Statistics figures for 1996 show that around 100,000 people are classified as homeless in Australia.

Our indigenous population is also ageing and seeking accommodation and there are an increasing number of people from other nations living in Australia. Similarly there is a significant population of people with disabilities that have been living at home with parents who are now elderly. In time these people will also need their housing needs addressed.

It is possible that due to people living longer, those renting in the private market will remain tenants for many years longer than in the past. It is also possible a person entering private rental facility at age 60 may remain a tenant for around 20 years.

Our Future

How do we see our future?

Abbeyfield Australia will become a proactive contributor to the national discussion on social housing and a prominent provider of new rental housing stock. We will work to our strengths and our experience in providing safe, secure, community-inclusive group housing, while extending accommodation options by utilising other forms of housing where practical and cost effective.

We recognise that the cost of constructing houses is a significant burden and not something that can be taken on by Abbeyfield Australia alone. We seek to collaborate with Government, commercial partners, and philanthropic organisations to achieve our goals.

In achieving this Abbeyfield Australia will become financially secure and viable and have developed a sustainable business model.

Under our 'Create 8 Initiative', Abbeyfield Australia will build at least four households in 2012/2013 and eight households annually in 2013/2014 and 2014/2015.

By 2015 Abbeyfield Australia will oversee the ownership and operation of 46 households, providing accommodation for 650+ people. By 2025 it is envisaged Abbeyfield Australia will have created accommodation for around 1300 people in more than 100 group houses.

Opportunities

The ageing population means there will be an increasing number of people seeking rental accommodation. As rents for private and public rentals continue to consume increasing proportions of income, more people will seek quality affordable accommodation such as offered by Abbeyfield households.

Abbeyfield Australia is one of only a handful of recognised national housing providers. Abbeyfield Australia has a strong international and national brand. People recognise Abbeyfield houses as being there to provide secure and private accommodation in the community.

Abbeyfield Australia has an opportunity to capitalise upon its unique strengths and knowledge and to collaborate with others for the purposes of creating new and additional housing stock. A planned approach to growth and development by Abbeyfield Australia would develop revenue, build sustainability and provide housing for an increasing number of people.

Alternative funding models exist in other Abbeyfield countries and these provide Abbeyfield Australia options for local implementation.

Currently Abbeyfield Australia has 26 affiliated houses and hostels throughout Australia. This demonstrates a real need for group housing in the Abbeyfield model. When profiled, Abbeyfield houses are suitable for both metropolitan and rural areas. By using a simple extrapolation, there are approximately 520 Local Government Areas throughout Australia. One Abbeyfield house in each LGA would provide accommodation for more than 5200 people. In turn this would provide positive outcomes within every electorate and every local government in Australia.

Opportunities exist for Abbeyfield Australia to capitalise upon the growing need for retirement housing with the potential for strong growth in group housing, independent living units and residential aged care. The potential exists to develop integrated accommodation facilities that provide a seamless transition for people as they age in place.

Group accommodation for adults with mild to moderate intellectual disabilities also presents a significant opportunity for Abbeyfield Australia. If overlaid with additional support or case management resources (in collaboration with another organisation), the Abbeyfield Disability House has the potential to cater well for intellectually disabled residents with higher care needs.

Group accommodation for more diverse cohorts, such as older ex-prisoners, students, younger adults with mild physical disabilities, also presents a growth opportunity for Abbeyfield Australia. Such initiatives also provide the opportunity to collaborate with other specialist service organisations or governments.

We recognise there are many alternative finance models to develop future housing stock. We will investigate alternative finance options during 2010/2011 and develop a process for the future that enables Abbeyfield Houses to be funded using the model most appropriate for the circumstances and funding levels.

Threats

The single greatest threat to Abbeyfield Australia is its lack of financial reserves and revenue dependent upon static affiliation levies. This cannot be resolved by a one-off injection of funds. In the long term this requires Abbeyfield Australia to implement a planned process of growth.

Most Abbeyfield houses are currently owned by the relevant state housing authority or local municipal council. Abbeyfield Australia has an equity stake in very few houses. Decisions made by the local Abbeyfield local societies are generally made for the benefit of the respective Abbeyfield household with little regard for the long term sustainability of Abbeyfield in Australia.

Each Abbeyfield house requires a group of 6 - 10 volunteers to manage the business and resident aspects of the household. Management can be a time consuming process with the bulk of work often falling onto the shoulders of a select few. For every house developed by Abbeyfield Australia under the current model a new community committee must be recruited. Often, without the work and commitment of that committee the house would not even be developed. Locating community volunteers to operate and manage each house will be an ongoing challenge.

Rental payments are currently set at 70% of pension payments plus the CRA. In almost all instances residents are not currently required to pay an incoming bond. This model does not take into consideration the financial means of a tenant. It assumes all tenants are living on a pension and have little or no assets. The outcome is an arbitrary cap on the rental revenue to the local Abbeyfield Society, which also then limits affiliation fees to Abbeyfield Australia. This model restricts the ability of Abbeyfield Australia to leverage bonds and retained earnings into investments or additional housing stock.

Annual affiliation levies are currently set at five per cent of all rentals received by each house and 1.25% of income by an aged care hostel. Abbeyfield Australia does not have in place a process for increasing Affiliation fees in line with the cost of living. Essentially the cost of operating Abbeyfield Australia continues to increase while revenues remain relatively static or decline in real terms.

Our Plan

Supporting our residents

The Board and Management are firm in their belief that Abbeyfield Australia exists primarily to facilitate the development of group housing throughout Australia. We acknowledge that social housing must benefit those unable to afford private accommodation but also feel that people of independent means must not be excluded from taking advantage of Abbeyfield accommodation.

Abbeyfield Australia aims to provide high quality accommodation in a secure and private environment where residents can maintain significant independence and continue to be a part of their community.

We will achieve this by:

- providing modern, comfortable and secure houses
- engaging with communities to identify housing needs and forming house management committees
- ensuring all committee members and housekeepers have the ability to provide a safe and private environment for residents
- listening to and acting upon, feedback from staff, residents and volunteers
- regularly updating the design specification for Abbeyfield accommodation to ensure it meets contemporary and future housing needs and resident expectations.

Building support for group housing

Abbeyfield Australia is committed to:

- being an active participant in the national discussion on social housing.
- building relationships with government funding agencies
- contributing our knowledge and experiences to the discussion on social housing

Forming partnerships

Abbeyfield Australia is committed to building relationships with a variety of parties including governments, national philanthropic trusts and corporate sponsors.

We will achieve this by:

- building relationships with people in all levels of Government with an interest in social housing
- where practicable, becoming part of the regulatory framework for housing providers

- bringing together both national philanthropic trusts and major corporate sponsors to help develop group housing.

Building a financially viable and sustainable organisation

The Board and management of Abbeyfield Australia are committed to building a viable and sustainable organisation that will continue to provide housing solutions for current and future generations.

We will achieve this by:

- ensuring we meet all the requirements of the housing regulatory frameworks
- adopting a business model that generates sufficient revenue to ensure long term sustainability.

Abbeyfield Australia is committed to the management of assets and resources in a responsible manner so as to achieve the objectives of this strategic plan.

We will achieve this by:

- maintaining a strengths-based Board with knowledge and understanding of social housing issues
- establishing annual business plans that are realistic and achievable
- conducting three-yearly strategic planning cycles, with an inbuilt review each year.
- implementing a process for monitoring progress towards achieving the outcomes of this strategic plan
- ensuring any future development of housing meet the objectives of Abbeyfield Australia

Outcomes

During the 2010 planning sessions the Board established a number of strategic goals aimed at securing the sustainability of Abbeyfield Australia. These include, developing a plan for developing more households, becoming financially sustainable, developing high quality internal processes and expanding services to our members and stakeholders.

Outcome 1: Planned development of houses via the 'Create 8 Initiative'

Abbeyfield Australia has established the 'Create 8 Initiative' as a growth target for Abbeyfield Australia. The initiative aims to develop at four new Abbeyfield households in 2012/2013 and eight new households in 2013/2014 and 2014/2015.

Abbeyfield Australia is committed to implementing a range of strategies designed to ensure this goal is achieved, including:

- mapping the nationwide demand for Abbeyfield housing and implementing a process for meeting that demand
- reviewing the Abbeyfield design specification for houses to ensure it meets community and resident expectations
- collaborating with Government to develop group housing as a solution to national housing issues
- partnering with national philanthropic trusts and major corporate sponsors that have the resources to help achieve this goal
- implementing a process for raising awareness amongst communities about the value created by Abbeyfield.

Outcome 2: Ensuring our financial sustainability

Abbeyfield Australia is committed to ensuring the organisation remains viable and sustainable and will implement a range of strategies designed to ensure this goal is achieved. These include:

- charging a development fee from all new houses
- charging an annual affiliation levy for affiliated local societies.

Abbeyfield Australia has established an additional goal of building equity in future developments so that eventually this equity may be leveraged into ongoing investment in housing. To achieve this goal we will:

- manage the development of each new 'Abbeyfield Series 2' house from 2010
- seek to secure an interest in the real property.

Outcome 3: Develop high quality internal processes

Abbeyfield Australia is committed to developing internal processes based upon best practices and meeting requirements of the regulatory framework for housing providers.

To achieve this we will:

- build a diverse skills based board with the ability to influence and network within government and sector circles, and /or an understanding of national social housing issues
- where appropriate, work with government to become registered as a housing provider
- contribute to discussions on the merits of a national registration process for community housing providers.

Outcome 4: Better service to members

Abbeyfield Australia is committed to providing the highest possible service to members and stakeholders.

To achieve this goal we will:

- facilitate and project manage the purchase of land and the construction of each new Abbeyfield household
- provide advice and guidance for volunteer committee members on their role and responsibilities
- facilitate a comprehensive insurance policy suite with a national broker
- assist with the recruit housekeepers
- provide a centralised bookkeeping process for each house committee
- produce marketing literature and marketing collateral to promote the Abbeyfield brand and households
- provide in-service professional development opportunities for local society employees and volunteers



- engage with the three aged care facilities within the Abbeyfield 'family', to identify ways in which Abbeyfield Australia can use its national perspective to better service their unique aged care sector needs.

Action plan

1. The 'Create 8 Initiative' for growth

- Profile a typical Abbeyfield household environment and objectively measure the value created for the community
- Update the Abbeyfield House design specification and indicative capital cost for 'Abbeyfield Series 2' houses – encompassing a larger private living area for each resident and a greater number of residents per
- Develop pathways to collaborative partnerships with Government, philanthropic trusts and corporate sponsors
- Conduct a national mapping exercise to identify appropriate communities for new Abbeyfield households
- Investigate the capital funding models used by other Abbeyfield nations
- Establish a framework and guidelines for land purchase and house construction under the Create 8 initiative (Abbeyfield Series 2)
- Liaise with Federal, State and Territory housing agencies to establish registration processes
- Implement a national branding program to increase awareness of the Abbeyfield organisation and the benefits of Abbeyfield accommodation
- Develop Abbeyfield households and local management committees for four households in 2012/2013 and eight annually to in 2013/2104 and 2014/2015

2. Financial viability

- Change house development guidelines for future houses (Abbeyfield Series 2) to enable Abbeyfield Australia to seek an equity stake in each new house
- Establish new resident entry bonds for incoming residents in new houses (Abbeyfield Series 2)
- Apply an un-capped rental limit to new houses (Abbeyfield Series 2)
- Diversify and grow our income and capital base by creating an Abbeyfield Foundation and appointing a prominent patron.

3. Internal operations

- Review Board membership to identify potential skill gaps (2010/2011)
- Establish terms of reference for an effective Board sub-committee structure (2010/2011)
- Recruit a house development officer(s) (2011/2012)
- Increase administrative support to full time equivalent (2011/2012)
- Formalise an Instrument of Delegation for the CEO (2011/2012)
- CEO role to become full time (2011/2012)

4. Expanding services to affiliated Local Societies

- Comprehensively update the 'Blue Book' (House management policy and procedure manual) (2010/2011)
- Consult with the three aged care facilities within the Abbeyfield 'family' (Mortlake, Charingfield and Williamstown) to identify ways to better service their specific needs (2010/2011)
- Produce marketing literature and promotional material to assist local societies to promote their houses and hostels (2010/2011)
- Conduct user survey and enhance the Abbeyfield Australia web site to include a 'members only' library – including Blue Book sections, fund raising opportunities for Local societies, frequently used forms, and generic templates for committee agenda, committee minutes, annual budgets, societies and letterhead (2011/2012)
- Develop a national program to attract and induct a constant supply of new members for local society committees of management, and encourage succession planning (2011/2012)
- Develop and implement a generic strategic planning package to assist local Societies to plan for a successful future (2011/2012)
- Investigate processes for relieving local societies of management functions such as coordinating house maintenance, book keeping services, or recruitment (2011 - 2012)

Accountability

Implementing our plan

Each year the management will prepare a business plan complete with financial projections for the purposes of providing the Board with a measurement tool and a baseline from which to monitor progress. The business plan will outline the key actions needed to be taken to maintain progress towards achieving the outcomes established in this strategic plan.

Monitoring and review process

The Board of Abbeyfield Australia is committed to monitoring progress against this strategic plan and has requested the Chief Executive Officer provide an update on progress at each board meeting.

This Strategic Plan was produced with the assistance of John Coxon, John Coxon and Associates, PO Box 5083, Warrnambool, Vic, 3280. www.johncoxon.com.au



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