



Alliance
Housing WA

Supporting Affordable Housing in the South West

ANNUAL REPORT 2018



Supporting Affordable Housing in the South West



Alliance Housing plays an integral role in relieving housing poverty in communities throughout South West WA. An independent, sustainable, not-for-profit organisation, we are passionate about providing affordable housing to ensure safety, security and quality of life for people in need. Alliance Housing has been meeting the need for affordable, secure, high quality housing in the Greater Bunbury and South West regions for more than 20 years. From small beginnings, the organisation has grown to now manage 129 properties around WA, housing more than 200 adults and children throughout Australind, Bunbury, Eaton, Busselton, Manjimup, Nannup, Donnybrook, and Narrogin.



Our Mission:

To relieve housing-related poverty by providing and managing quality, secure and affordable housing for people in need. To develop and promote awareness of housing issues and community housing within the framework of a "not for profit" organisation.



Our Vision:

To encourage tenant participation in the development, design and management of the accommodation provided by Alliance Housing. To continue growing our portfolio of affordable housing across Western Australia, and providing individuals and families with secure accommodation that meets their needs.

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*What our
Clients Say:*

"Always polite
and pleasant to
deal with."

"We found Rachel
to be a very nice
approachable person,
easy to talk to, and so
far so good. Well done
Rachel."

"They were the
best agency I have
ever been with."

Board Members



Paul Connell
TREASURER



Keryn Curtis
BOARD MEMBER



Peter Proctor
BOARD MEMBER



Sandy O'Neill
BOARD MEMBER



Christine Penny
BOARD MEMBER



Jan Pederson
CHAIRPERSON



Rob Homes
BOARD MEMBER



Andrew McRobert
BOARD MEMBER



Clark Ward
BOARD MEMBER



Doug Wenn
BOARD MEMBER



Estelle Jay
BOARD MEMBER

"I have found the
staff at Alliance
Housing very helpful
and courteous."

Management Team



Mike Bateman
CEO



Kay Shaw
BUSINESS MANAGER



Shirley Wood
ADMINISTRATION
ASSISTANT



Rachel Davies
TENANCY OFFICER



Jenna Dewar
TENANCY OFFICER

Chief Executive Officer's Report

If our increase in the number of housing stock now under management is a measure of success, we have had a “cracking” year. Our numbers have gone from 99 to 129. The revenue from our portfolio ensures we keep our homes well maintained and provide our clients with a reliable and responsible service. Funding will also be applied to future construction projects, most notably eleven (11) units of accommodation for seniors in Donnybrook.



CHIEF EXECUTIVE OFFICER
MIKE BATEMAN

We entered into a Memorandum of Understanding with Foundation Housing, a large Perth based community housing provider to manage ten (10) units of housing at Narrogin. It is hoped that this agreement with Foundation Housing opens up further opportunities into the future. We have developed some significant support links in the Narrogin area, which assist in the ongoing management. We are also in discussions with other agencies in the area to investigate further housing options.

Judy Jones our Chair for six (6) years and a great supporter of Alliance Housing left us in July 2017 to venture to the Northern Territory. Her oversight and ongoing governance was appreciated by all. Taking Judy's place as Chair is Jan Pedersen, who has demonstrated a great enthusiasm for the community housing sector and brings a wealth of experience and knowledge to our organisation. During the year we also had Board members Sandy O'Neill, Peter Procter and Keryn Curtis depart. We certainly thank them for their service to Alliance Housing.

Alliance Housing has been steadily working through the process of registration under the National Registration of Social & Community Housing (NRSCH), which has been very onerous, however it is a mandated requirement which we must have completed as soon as possible. This process has made us look closely at our operations and make changes that will have long term benefits for ourselves and the community housing sector.

We conducted our first tenant barbecue at our premises in Albert Road Bunbury, which was very well attended and enjoyed. We were fortunate to have Don Punch (MLA) attend and it was heartening to have Don hear the experiences of our clients 'first hand'. Our appreciation is extended to Don for his ongoing interest and support to Alliance Housing and the community housing sector in the South West.

The Minister for Housing Peter Tinley also made himself available on a number of occasions to discuss the 'gaps' in the provision of adequate housing in the South West and is very supportive of the efforts of Alliance Housing.

Our website which we always thought lacked the desired impact has been looked at by a private local company (IP Creative) and the changes are taking place. The launch of the new and improved format will take place early into the next financial year. I would like to thank IP Creative for their efforts and creativity in working with the Alliance staff.

Some time ago we developed a proposal as a joint venture with the Shire of Donnybrook/Balingup to construct seniors housing in the town of Donnybrook. We were successful in obtaining a significant grant under the Royalties for Regions scheme and we started making plans. These plans were put on hold after the change of government. After the 'dust settled' we were asked to re-submit under the Regional Aged Accommodation Program (RAAP) and we have been successful. I can gladly say we are now moving on with the project in partnership with the South West Development Commission and the Shire of Donnybrook/Balingup.

Finally and most importantly I thank and commend the staff at Alliance Housing for their sustained efforts throughout the year, which at times has been problematic however, the 'can do' attitude they continually bring to the workplace meets every challenge they confront.

We look forward to the next year with some expectations as to the potential new ventures that may present themselves as we continue to grow and exert a significant influence over the community housing sector in the South West and beyond.

Mike Bateman
Chief Executive Officer

Chairperson's Report

We're set to go from strength to strength through open communication with others in the community housing sector, our 'can-do' attitude, our strong asset base and our affirmative action in seeking opportunities for growth. We're delivering on our core purpose – all to the benefit of those in our regional community in need of affordable housing.



CHAIR
JAN PEDERSEN

2017 – 2018 has been a dynamic year for Alliance Housing Board and Staff. Together we faced multiple tasks:

- Ensuring service excellence to the regular clients in our 129 homes;
- Continually expanding further afield, including taking on the management of units in Narrogin;
- Ensuring all legalities and the security of residents of the BAPH Collective were met, as management transitioned to Alliance Housing. This process was aided by our two new Board members Clarke Ward and Estelle Jay;
- Attending to detailed requirements for national registration as a leading Community Housing provider;
- Receiving the green light for the Donnybrook Affordable Housing Development in January, only to be disappointed when the anticipated government funding was withdrawn- then elated with the reinstatement of funding via the Regional Aged Accommodation Program;
- Raising our profile as an efficient, friendly, community housing provider, and a preferred alternative to government housing;
- Raising awareness of the need for more community housing throughout the region.

NRSCH registration has demanded attention from Staff and Board, with re-drafting/amending of core charters, policies and procedures that make up our governance instruments. Community Housing Registrar Lyn Anderson assisted in identifying where our policies could more closely interconnect with our planning documents. In addition to providing a 'second-to-none' service to our expanding client base, staff produced numerous governance documents and recommended procedures needed for registration. It remains to be seen at what Tier AH will be accepted, but the extensive work will provide us with a firm base and assurance that we will meet compliance requirements.

A number of major initiatives were introduced, including:

- The formation of the Risk and Audit Committee, enabling detailed examination of complex matters and succinct presentations for Board approvals;
- Improved security requirements in Codes of Practice, contractor selection, etc;

- A more professional web presence with the engagement of a professional IP company who will maintain an attractive, dynamic website and raise our community profile;
- A workshop for Board members facilitated by Iain Massey of Upland Consulting, assisting members to gain a clearer understanding of Board duties and obligations.

Our thanks to Mike our formidable CEO, who pro-actively keeps abreast of potential opportunities to strengthen AH. I salute his collaboration with staff and board. There is scarcely a report or an opportunity that escapes his notice. Coupled with his extensive personal, business and government networks, he is the ideal person to lead our organisation.

Board acknowledges the competency of Business Manager Kay Shaw. We extend our sincere thanks for her attention to detail and the support she provides to other staff members. Board was pleased to endorse Kay's two year online Graduate Certificate of Social Science (Housing Management and Policy) course at Swinburne University.

Sincere thanks to our dedicated staff, who earned a 96% satisfaction rate from tenants. Thanks to our tenancy officers, Shirley and Rachel.

Thank you to Board members for your contribution to regular meetings and the added time you have set aside for the workshops, sub-committees and consultations. Our thanks too to Board members who have assisted in the development of AH over the years and now find it is time to make a change: Sandi O'Neill, Peter Proctor and Keryn Curtis.

I would also like to express my thanks to Board and Staff for the support they have shown me as the new Chairperson, replacing the highly respected Judy Jones. It has been a rewarding experience. AH is always alert to opportunities to serve greater numbers of our regional community in need of affordable housing. After striving hard to reach that magic number of 100 homes under management, now almost like a roller-coaster, we are on the brink of capitalising on a range of new ventures.

Jan Pedersen
(M. J. Pedersen)

Treasurer's Report

I am happy to report that Alliance Housing (WA) maintained its good performance over the 2017-18 financial year.

I am happy to report that Alliance Housing (WA) maintained its good performance over the 2017-18 financial year.

Operating income for the year was \$1,188,264- a rise of 14.2% on the previous year. The operating expenditure rose by 9% compared with expenses for 2017-18, mainly due to a significant rise in general property maintenance costs, an increase in council rates, additional salary and wages costs as a result of an increase of staff, and additional working hours required to manage the full management acquisition of 39 additional properties including Narrogin, Nannup and Bunbury Aged Care (BAPHC).

The overall equity for Alliance Housing at 30th June 2018 stands at \$8,416,522 and is made up of the overall operational surplus for the year (\$300,644) plus the equity balance carried forward from 2016/17 (\$4,072,301) and BAPHC reserve funds held (\$4,043,577). This obviously provides the organisation with a very stable basis to continue our day to day operation and allow for further growth.

During 2018 significant progress was made in repaying the \$540,000 business loan taken out in 2017 for the two units purchased in Collie, and the balance now stands at \$340,000. Efforts to repay the loan as quickly as possible will continue.

These details are included in the audited "Statement of Financial Performance" report for the financial year. All of Alliance Housing's financial activities presented in this Annual Report have been considered by the organisation's appointed auditor, Mr Des Duplex, as a fair record.

I advise that I will not be seeking re-election as Alliance Housing's treasurer and will be standing down from the Board. I have been associated with this organisation for about 15 years, both as an employee and a Board member, and have watched its phenomenal growth over that time. I would like to thank all staff at Alliance Housing, particularly Mike Bateman for his "go get" enthusiasm that has grown the organisation, and Kay Shaw, for her common sense and excellent financial management. I am sure that Alliance Housing will continue going from strength to strength in the future.



Paul Connell
Treasurer



TREASURER
PAUL CONNELL

Opening accumulated fund (1/7/2017)

\$1,839,063

Asset revaluation reserve

\$2,233,238

BAHPC Reserve Fund

\$4,043,577

Surplus for year 2017/18

\$300,644

Total equity

\$8,416,522

Independent Auditor's Report

TO THE MEMBERS

Audit Opinion

We have audited the financial report of ALLIANCE HOUSING (WA), which comprises the statement of financial position at 30 June 2018, the statement of profit or loss and other comprehensive income, statement of changes in equity, statement of cash flows for the year then ended, notes to the financial statements including a summary of significant accounting policies and the responsible persons declaration.

In our opinion the accompanying financial report is in accordance with the requirements of ACNC Act including:

- (a) giving a true and fair view of the registered entity's financial position as at 30 June 2018 and of its financial performance for the year then ended; and
- (b) complying with Australian Accounting Standards to the extent described in Note 1

We conducted our audit in accordance with Australian Auditing Standards. Our responsibilities under those standards are further described in the *Auditor's Responsibilities for the Audit of the Financial Report* section of this report. We are independent of the registered entity in accordance with the ethical requirements of the Accounting Professional and Ethical Standards Board's APES 110 Code of *Ethics for Professional Accountants* (the Code) that are relevant to our audit of the financial report in Australia. We have also fulfilled our other ethical responsibilities in accordance with the Code.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

Emphasis of Matter -Basis of Accounting

We draw attention to Note 1 to the financial report, which describes the basis of accounting. The financial report has been prepared for the purpose of fulfilling the entity's financial reporting responsibilities. As a result, the financial report may not be suitable for another purpose.

Responsibility of the Responsible Persons

The responsible persons of the registered entity are responsible for the preparation of the financial report that gives a true and fair view and have determined that the basis of preparation described in Note 1 is appropriate to meet the entity's requirements and the needs of the members. The responsible persons' responsibility also includes such internal control as they determine is necessary to enable the preparation of a financial report that gives a true and fair view and is free from material misstatement, whether due to fraud or error.

In preparing the financial report the responsible persons are required to assess the entity's ability to continue as a going concern, disclosing, as applicable, matters relating to a going concern and using the going concern basis of accounting unless they intend to liquidate the entity or cease operations or have no realistic alternative but to do so.

Auditor's Responsibilities for the audit of the Financial Report

Our objectives are to obtain reasonable assurance about whether the financial report as a whole is free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance, but is not a guarantee that an audit conducted in accordance with the Australian Auditing Standards will always detect a material misstatement when it exists. Misstatements can arise from fraud or error and are considered material if, individually or in aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of the financial report.

As part of the audit in accordance with Australian Auditing Standards, we exercise professional judgement and maintain professional scepticism throughout the audit. We also:

- Identify and assess the risks of misstatement in the financial report, whether due to fraud or error, design and perform audit procedures responsive to those risks and obtain audit evidence that is sufficient and appropriate to provide a basis for our opinion.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control.
- Evaluate the appropriateness of accounting policies used and the reasonableness of accounting estimates and related disclosures made by the responsible persons.
- Evaluate the appropriateness of the entity's use of the going concern basis of accounting and, based on the audit evidence obtained, whether a material uncertainty exists related to events or conditions that may cast significant doubt on the entity's ability to continue as a going concern. If we conclude that a material uncertainty exists, we are required to draw attention in our auditor's report to the related disclosures in the financial report or, if such disclosures are inadequate, to modify our opinion. Our conclusions are based on the audit evidence obtained up to the date of our report. However, future events or conditions may cause the entity to cease to continue as a going concern.
- Evaluate the overall presentation, structure and content of the financial report, including the disclosures, and whether the financial report represents the underlying transactions and events in a manner that achieves fair presentation.



D S Duplex, CPA
Vickery Accounting
Dated: 13 September 2018

STATEMENT OF FINANCIAL POSITION AS AT 30 JUNE 2018

2017				2018
	ACCUMULATED FUNDS			
1,639,649	Accumulated Funds at start of year		1,839,063	
2,233,238	Asset Revaluation Reserve		2,233,238	
0	BAPHC Funds Introduced		4,043,577	
199,414	Surplus for the period		300,644	
4,072,301	Accumulated Funds at year end			8,416,522
	This was represented by:-			
	CURRENT ASSETS			
145,518	Cash at Bank - Working Account		161,515	
5,501	Cash at Bank - REST Working Account		9,748	
36,377	Cash at Bank - Business Cash Reserve 253833		747,046	
271,280	Cash at Bank - Business Cash Reserve 238128		292,788	
45,560	Prepayments & Accrued Income		46,971	
216	Debtors		216	
300	Petty Cash		300	
504,752				1,258,584
	less CURRENT LIABILITIES			
5,501	Bonds & Other Funds Held in REST		9,748	
6,997	Accrued Wages		7,205	
6,101	Insurance Settlement Advance		5,911	
1,867	Corporate Credit Cards		720	
-5,494	GST & Payroll Liabilities		-4,094	
10,128	Creditors		17 197	
25,100				36,687
479,652	NET CURRENT ASSETS			1,221,897
	add NON - CURRENT ASSETS			
79,170	Office Equipment	81,577		
-75,928	Less Accumulated Depreciation	-78,038	3,539	
39,185	Motor Vehicle at Cost	40,989		
-14 204	Less Accumulated Depreciation	.3 416	37,573	
2,287,794	Rental Properties at Cost		2,287,794	
2,145,000	Rental Properties at Valuation		2,145,000	
0	Rental Properties Transferred from BAPHC		3,388,125	
4,461,017				7,862,031
	less NON - CURRENT LIABILITIES			
540,000	Business Loan Account		340,000	
28,387	Unused Annual Leave Provision		27,122	
43,871	Unused Long Service Leave Provision		44,174	
256,110	Provision for Maintenance		256,110	667.406
868,368				
4,072,301	4,072,301			8,416,522

In accordance with our policy, there were no incidents of fraud in the past year

STATEMENT OF PROFIT OR LOSS AND COMPREHENSIVE INCOME FOR THE YEAR ENDED 30 JUNE 2018

2017				2018
	OPERATING INCOME			
999,477	Property Income		1,143,790	
14,485	Property Income - Management Fees		5,573	
23,866	Property Income - Tenant Liability		34,730	
2,255	Interest & Sundry Income		4,171	
1,040,083				1,188,264
	OPERATING EXPENDITURE			
	Property Management			
36,568	Insurance - Landlord		40,315	
78,720	Property Maintenance - General		112,811	
102,663	Rates, Service Charges & Levies		108,238	
74,689	Long Term Maintenance		76,688	338,052
292,640				
	Administrative Expenses			
2,272	Advertising, Promotion & Events		1,539	
3,975	Accounting & Audit		4,125	
4,734	Bad Debts Written Off		8,003	
2,229	Bank Charges & Transaction Fees		2,495	
17,351	Consultants & Legal		14,178	
9,789	Computer & IT Expenses		10,109	
13,152	Depreciation & Profit/Loss on Disposal		13,235	
3,502	Employee Fringe Benefits		4,341	
24,256	Loan Interest & Expenses		22,186	
3,955	Marketing & Web Expenses		3,100	
2,841	Minor Equipment Purchases		1,202	
4,811	Office Expenses		4,569	
2,666	Office Relocation Costs		0	
2,309	Postage		2,267	
3,419	Printing, Fax, Stationery and Photocopying		4,765	
3,984	Professional Indemnity & General Insurance		3,576	
54,507	Rent, Service Charges & Electricity		50,469	
5,523	Repairs, Maintenance & Sundries		6,503	
665	Security		511	
1,422	Subscriptions, Licenses & Govt Charges		2,095	
26,770	Superannuation		31,753	
6,498	Telephone		6,751	
3,443	Training & Other Staff Expenses		3,579	
13,622	Travel, Accommodation & Meals		14,532	
303,174	Wages & Salaries		331,806	
1,310	Workers Compensation Insurance		1,879	549,568
814,819	Total Expenditure			887,620
225,264	OPERATING SURPLUS			300,644
	OTHER INCOME & EXPENDITURE			
180,000	Lotterywest Grant		0	
-205,850	Less Expenditure - Office Fit-out, Fixtures & Fittings		0	0
-25,850				
199,414	TOTAL SURPLUS FOR THE YEAR			300,644

NOTES TO AND FORMING PART OF THE ACCOUNTS FOR THE YEAR ENDED 30 JUNE 2018

1. Statement of significant accounting policies

The committee has prepared the financial statements on the basis that the entity is a non-reporting entity because there are no users dependent on a general purpose financial report. The financial report is therefore a special purpose financial report that has been prepared in order to meet the requirements of the ACNC Act. The organisation is a not for profit entity for the purpose of preparing financial statements under Australian Accounting Standards.

These financial statements have been prepared in accordance with the recognition and measurement requirements specified by Australian Accounting Standards and Interpretations and the disclosure requirements of AASB 101 *Preparation of Financial Statements*, AASB 107 *Statement of Cash Flows*, AASB 108 *Accounting Policies, Changes in Accounting Estimates and Errors* and AASB 1054 *Australian Additional Disclosures*.

Basis of preparation

The financial statements have been prepared on an accruals basis and are based on historical costs unless specifically advised otherwise. The going concern assumption has been applied.

The following significant accounting policies, which are consistent with previous years unless stated otherwise, have been adopted in the preparation of this financial report:

Income Tax

The entity is exempt from income tax pursuant to the provisions of the Income Tax Assessment Act.

Property, Plant & Equipment

Where applicable each class of property, plant and equipment is carried at cost (unless specifically stated otherwise) less accumulated depreciation.

Depreciation

Where applicable depreciation is charged on plant and equipment at rates determined by their estimated useful lives and using the reducing balance method. Assets with a cost of less than \$1,000 are written off in the year of purchase.

Employee Benefits

Where applicable Annual Leave and long Service Leave are accrued at current rates of pay for all eligible staff.

Significant management judgement in applying accounting policies & Estimation Uncertainty

Management undertakes a number of judgements, estimates and assumptions about recognition and measurement of assets, liabilities, income & expenses. The actual results may differ from the judgements, estimates and assumptions made by management and will seldom equal the estimated results.

The following are the significant management judgements that may have been used in applying the accounting policies of the entity:

Useful lives of depreciable assets

Management reviews the useful lives of depreciable assets at each reporting date based on the expected utility of the assets. Actual results may vary due to many factors including obsolescence.

Provisions - Long Service Leave and Annual Leave

The liability for long service leave and annual leave is recognised and measured at the present value of estimated future cash flows at reporting date. In determining the present value of the liability attrition rates, pay increases and inflation are taken into account.

Audit Fees

Audit fees of \$4,125 were paid to Vickery Accounting during the financial year.



Catering for seniors in need of accommodation in the South West

Affordable housing for families, providing a solid foundation for the future



We provide quality, secure and affordable housing for people in need

Supporting affordable housing in the South West



Tenant Stories



Alliance Housing helps Kelly out

Kelly moved into an Alliance Housing property in April 2018, after needing to unexpectedly leave her home and go onto the Housing Authority priority waiting list.

"We only had a short period of time to leave the property. Not wanting to be homeless caused me distress and worry," Kelly said. "It was a relief when Alliance Housing contacted me, asking me to complete an application."

Kelly was very happy on seeing the house being offered.

"It is great to be in the house and the children have settled down," she said. "I wasn't sure how the children would go, due to having to change schools – but it's all worked out. Alliance Housing handled things smoothly and everything went well."



Life gets brighter for Tony

Tenant Tony has found life a lot brighter since starting with Alliance Housing.

"Alliance have helped me through some difficult times, and been very good to me," Tony said.

Tony has been looking after his autistic grandson since he was nine months old. Now fifteen, his grandson is blossoming as a result of the move to their current house.

"His grades are excellent in every subject," Tony said.

Tony has been doing a great job of looking after his house and yard as well, and recently planted some frangipannis in the front yard to bring a splash of colour as he and his grandson look forward to a bright future.

To top it all off, Tony was randomly selected from all tenants who returned their tenant survey, to win a Bunnings voucher. Congratulations Tony!

Margaret's Pleasant Change

I have never really enjoyed change, and now, as if relocation to Australia wasn't difficult enough, we were being taken over by Alliance. Never did I imagine that in my 70s, I'd have to virtually learn a new language (doona, ute, sunnies!) and have to understand that "see you later" from someone I would never see again actually seemed to just mean "goodbye."

And now – change again, with new rules, faces, and voices on the telephone.

Well, I don't know why I worried! The first "new person" with whom I came in contact was Rachel. She was helpful and pleasantly patient with all my queries. There was only one problem I had with her, and which gave me a good few worrying thoughts – her engagement ring had gone walkabout!

Unfortunately, my toilet cistern and hot water system were both playing up, giving rise to my

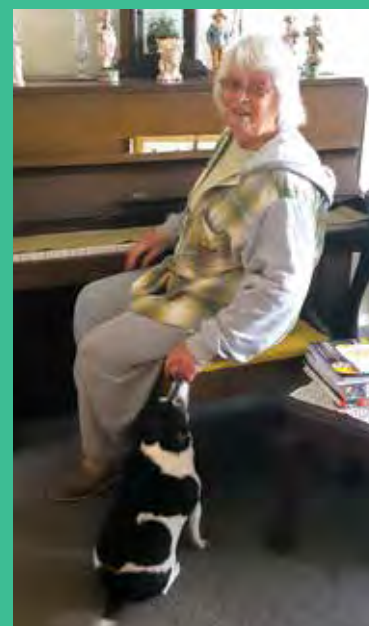
having to do something else I didn't enjoy – complain.

Again a new phrase I've learned was enacted: "No worries!" Both complaints were quickly sorted. When the toilet was attended to, I was staying with family because I could not use it for 24 hours, so the young plumber was in the unit on his own. The day on which he worked was a sodden one and I envisaged muddy footprints everywhere ... but the place was spotless. The young chap who came to stabilise the stove also swept up every vestige of dirt.

All the young men who came to attend to my complaints were pleasant and helpful. Are pleasant, neat, helpful, young men and women especially sourced by Alliance?

This change was a pleasant one – even more so when I received my new rental rate.

Margaret Doyle





Spotlight: Tenancy Officer Rachel Davies

Our Tenancy Officer Rachel Davies looks after approximately 50 properties across Australind, Collie and Bunbury, including 20 BAPHC properties.

Rachel was a vital part of the transition of the BAPHC properties to Alliance Housing. Her role was to manage the properties and tenants for a smooth transition.

"It all went quite well," Rachel said.

"The tenants were apprehensive in the lead up on what to expect. It was a really busy time, doing inspections. I had to work out what their rent would be- a lot of their rent went down, so that was received well. They were all well looked after units with nice tenants. After the initial meetings and inspections, we had to get a bit of maintenance done. I think they're all happy."

Rachel said the key to keeping the transition smooth was to keep tenants informed.

"Going out and taking the time to have a chat, to meet and personalise it a bit, was important. They've all had the same person to deal with, which has made it less daunting. It's just listening to what they had to say, and being friendly. I enjoy doing the BAPHC work. I like having the interactions."



Estelle Jay has been a part of the transition from BAPHC to Alliance Housing.

Transition to Alliance Housing

Bunbury woman Estelle Jay started out as a Lease for Life tenant with the Bunbury Aged Person Housing Collective (BAPHC) in 2005.

She joined the BAPHC Board as a tenant representative nine years ago, and in that time has attended monthly meetings to bring residents' concerns and maintenance problems to the board. She also had a front row seat during the transition of BAPHC properties to Alliance Housing.

"There's been a number of steps towards the transition," Estelle said.

"The board members were getting older, and as the Lease for Life alternative for over 55's became more expensive, the Board looked at selling the units, but as market prices fell, it was decided to rent the remaining units instead. When the transition began, there were only ten 'lease for lifers' left."

Estelle said the BAPHC looked at different options for how the tenants could be looked after and the organisation taken over.

"Alliance Housing, was the obvious choice," she said. "The Chairman was concerned about the Lease for Life tenants. He wanted to make sure they were protected."

BAPHC contracted a solicitor to oversee the transition and work in with Alliance Housing.

"We were brought up to date at regular meetings," Estelle said. "We were very well protected. I met Mike and the team."

"I'm very happy with the transition, as are the tenants- most of them pay less rent under Alliance. Our premiums are protected, and all in all the transfer went very well. I felt all the parties were very happy about it."

Estelle has been a Board Member with Alliance Housing for twelve months now.

"I've been very impressed with learning about their organisation. The tenants' rights and welfare are always the first consideration. When I've spoken to the tenants who've dealt with Rachel, they just love her, she's great," she said.

"They made me very welcome here on the Board, and it's been a new learning curve for me. I know that I can ring up here and talk to any of the team, I feel very welcome."

Growth Properties



Narrogin

In August 2017, Alliance Housing started managing ten units in Narrogin. This was our first venture outside the South West geographical boundary, and while it has been a challenge, we believe it has been a successful venture.

Owned by Foundation Housing and funded through the Commonwealth Government's stimulus package, Alliance Housing has entered into a ten-year agreement to manage the units. Two of the units are modified to suit a client with a physical disability. Alliance Housing has established a strong rapport with a number of support agencies in Narrogin, which has been of significant assistance in managing the complex. This is especially true of the Department of Communities (Housing) where the staff have been very generous with their time to ensure the best outcomes.





BAPHC

Alliance Housing has for some time been managing an aged housing complex in Forrest Avenue in Bunbury, which was previously under the care of the Bunbury Aged Person's Housing Collective (BAPHC). This group has now been dissolved and other properties under their management have been transferred to Alliance Housing.

In May of this year, the titles to a number of the units for aged housing were transferred into the name of Alliance Housing. This has been a significant bonus to Alliance Housing, as it increases both our revenue and our equity in property. It must be said that BAPHC did a wonderful job in management of the homes over a long period of time. All units are 2x1 and exclusively for clients over 55 years of age.

Danjangerup Cottages Nannup

Alliance Housing has managed nine units of housing for the aged in Nannup since May 2013, on behalf of a local committee in the town. This management was based on a "fee for service." However, as of November 2017 the committee dissolved and transferred the total property and tenancy management to Alliance Housing. This agreement was sanctioned by the Shire of Nannup and the Department of Communities (Housing). Over time the rental stream has been able to accumulate a significant amount of money, which we will be applying to major upgrades at all the units in partnership with the Shire.



What's New

Check out our new website!

We updated our website this year, to reflect the growth of our organisation, tell the stories of what we've been up to, and give our tenants a central reference point for dealing with us.

Check it out at www.alliancehousing.com.au for some great tips, all of our policies and processes, compliments, complaints and suggested feedback forms, and contact details.

You can also get an overview of our services, meet our team, find out what's new with the properties we are currently managing, and read our newsletters.



Barbecue for tenants



Alliance Housing board members Paul Connell and Clark Ward.



Alliance Housing receptionist Cheryl Neade and Bunbury tenant Julie Ballantyne.



Alliance Housing WA business manager Jay Shaw and Bunbury tenant Bob Parks.

ALLIANCE Housing WA hosted a tenant barbecue on March 23 as an opportunity for tenants and staff to get to know each other and build a lasting community relationship.

Bunbury MLA Don Punch was also among the guests of tenants, staff and board members.



Alliance Housing tenancy officer Shirley Wood with Crystal and David Short, of Bunbury, and their daughter Serenity, 6 months.



Aaron and Kelly Armstrong, of Carey Park.



Tenant Terry Scheutgens, of Kinella Gardens, Alliance Housing chairwoman Jan Pedersen and chief executive officer Mike Belman.



In the Media

Photos from Alliance Housing's tenant barbecue in March were featured in the South Western Times on April 12 2018.

This was a great event, which provided an opportunity for tenants and our team members to get to know each other.

One of our special guests at the event was Bunbury MLA Don Punch.

Thanks South Western Times for the great article! Due to the success of the barbecue, we will be making it a regular event. The next one is currently being planned for November.



Staff Training and Development

Our Business Manager Kay Shaw has been increasing her on the job skills and qualifications by studying a postgraduate qualification in Housing Management and Policy at Swinburne University of Technology this year.

Kay is the only Community Housing student in the whole of WA undertaking this course. Alliance Housing is financing the study.

The two-year distance course is designed to give students a rich understanding of Australian Housing and Homelessness systems, how they relate to low income housing delivery, and the role of social housing and homelessness organisations.

The course will also provide an opportunity to discuss governance with providers in other states, and gain knowledge of how providers in other states are tackling the challenges faced across Australia.



Stable home helps Bob

Bob went through a difficult time a while back – but he has been in one place, close to his family, for more than 18 years thanks to Alliance Housing. Here's what he had to say.

"Years ago I wrote this poem because I was going through a hard time and having suicidal thoughts. It made me feel better.

I came over to Western Australia to visit my daughters. While here I found housing with Alliance Housing.

I am in a lot better place mentally now, and have been living in my unit for over 18 years. That is the longest time I have ever stayed in one place. This is because I am looked after well by Alliance Housing, and I like living there."



Bunnings Voucher winner

A gift voucher was presented to Glenn for the work he has done to his house and garden. Glenn worked hard to achieve a lovely rear garden and ensured his property was clean and tidy. Glenn, who has been with us since November 2017, loves to garden and maintain his property. Alliance Housing appreciates all of Glenn's efforts.

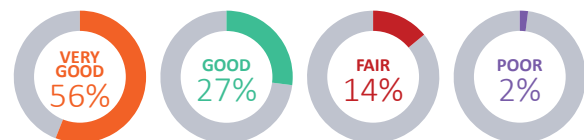
Tenant Survey 2018

Alliance Housing tenants are encouraged to provide us with feedback, this can be by complaints, appeals, comments or compliments. We welcome all suggestions on how to improve our service.

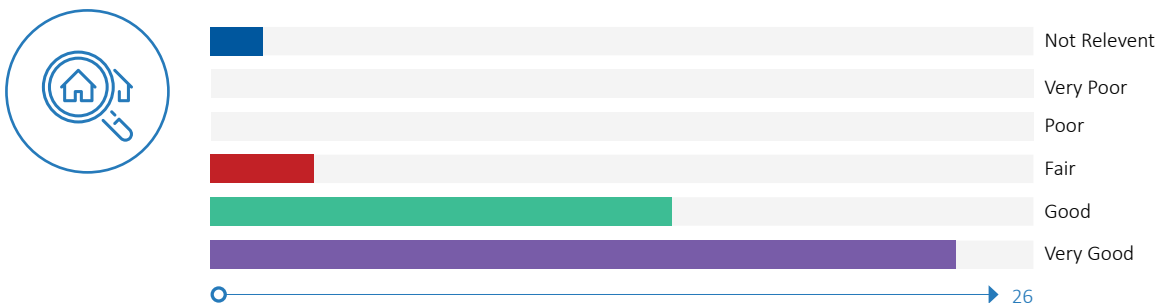
STAFF ATTITUDE, KNOWLEDGE & SKILLS



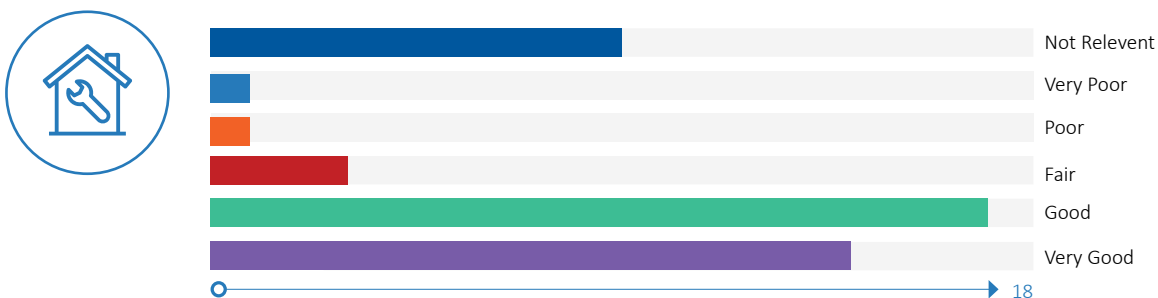
BEING ABLE TO CONTACT STAFF WHEN NEEDED



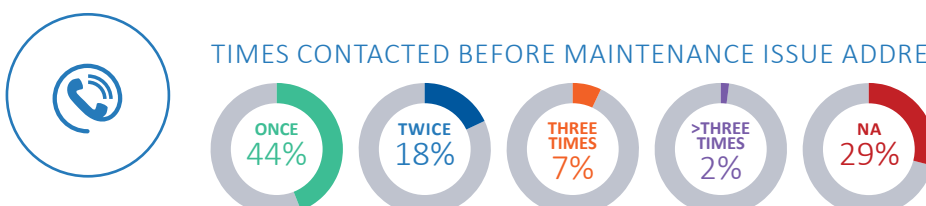
HOUSING INSPECTIONS



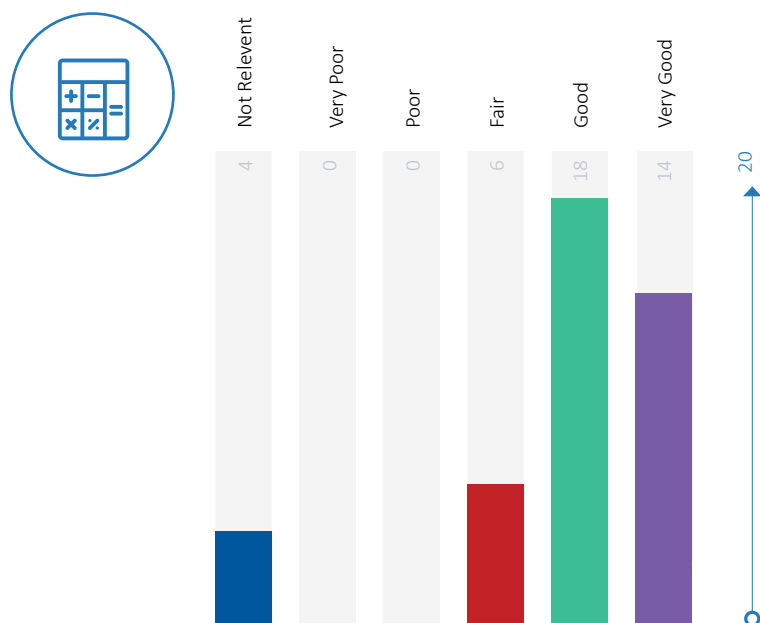
MAINTENANCE & REPAIRS



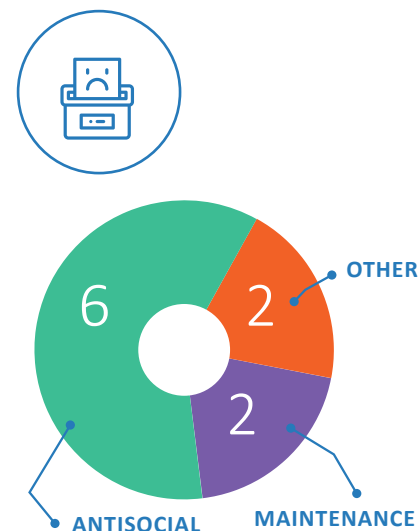
TIMES CONTACTED BEFORE MAINTENANCE ISSUE ADDRESSED



HANDLING OF RENT CALCULATIONS, PAYMENT AND REVIEWS



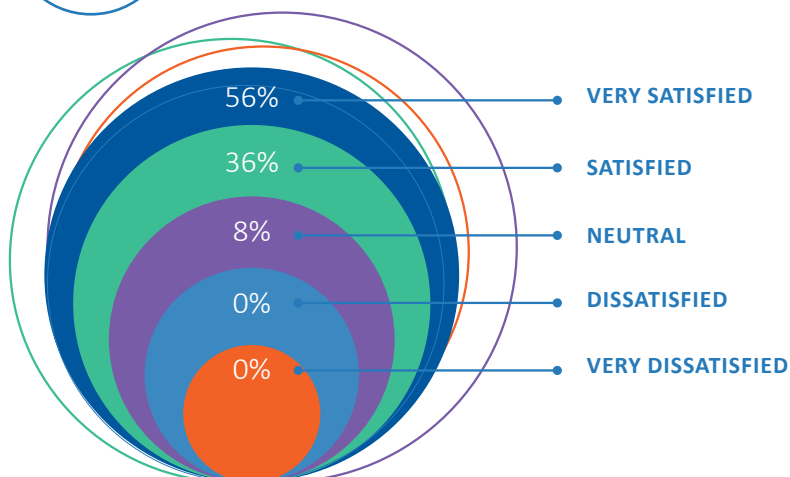
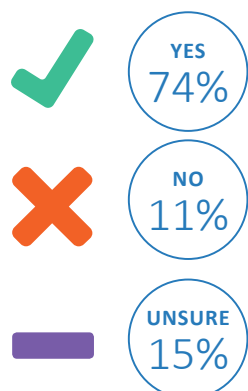
COMPLAINTS



Jan – June 2018:

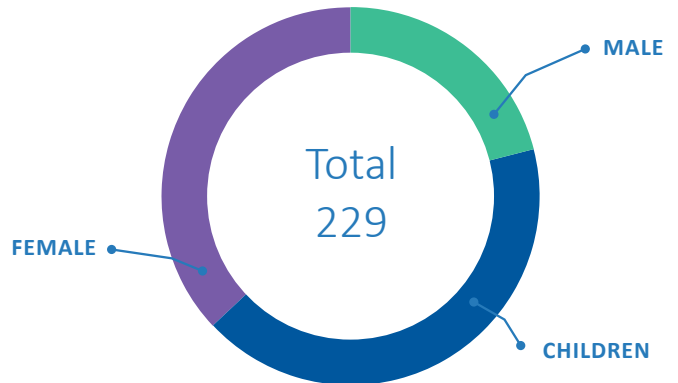
Received 10 complaints; all 10 have been resolved according to the Complaints process.

HOW USEFUL IS INFORMATION PROVIDED BY ALLIANCE HOUSING TO YOU?

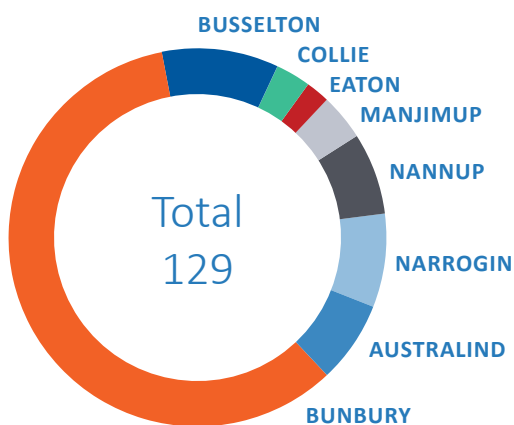


Accommodation Statistics 2018

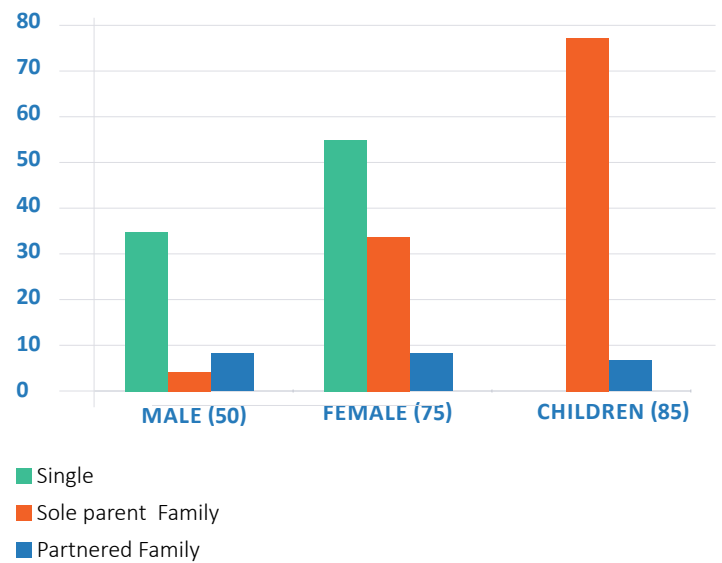
PEOPLE ACCOMMODATED



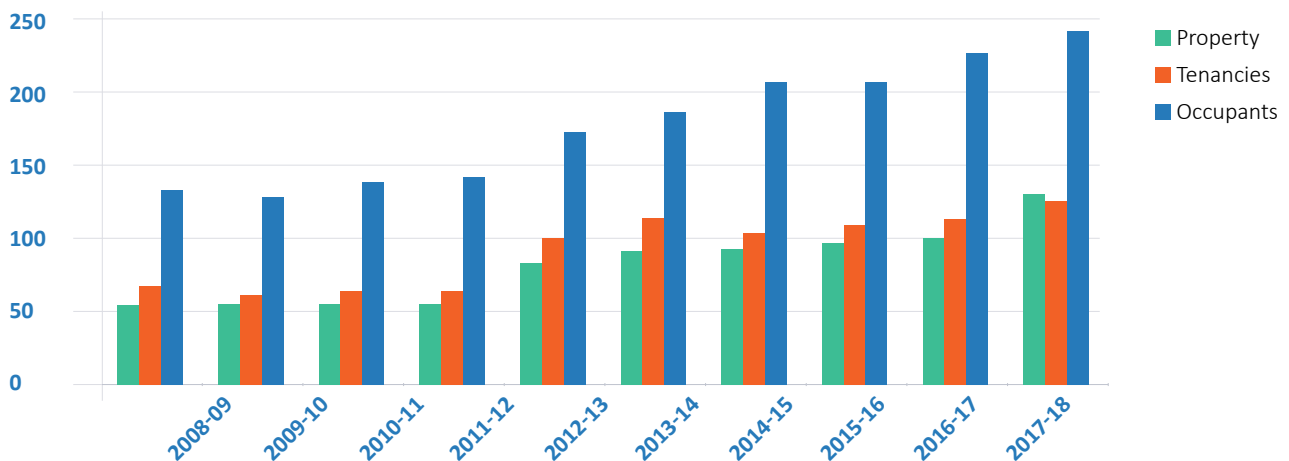
PROPERTY LOCATIONS



FAMILY TYPES AND OCCUPANT NUMBERS



GROWTH 2008 - 2018





*Alliance Housing: Safe,
affordable accommodation*

AGM Minutes

PRESENT

Jan Pedersen	Alliance Housing WA
Doug Wenn	Alliance Housing WA
Christine Penny	Alliance Housing WA
Paul Connell	Alliance Housing WA
Kay Shaw	Alliance Housing WA (Staff)
Andrew McRobert	Alliance Housing WA
Keryn Curtis	Alliance Housing WA
Shirley Wood	Alliance Housing WA (Staff)
Mike Bateman	Alliance Housing WA (CEO)
Chane Naude	Alliance Housing WA (Staff)
Peter Proctor	Alliance Housing WA
Rick Ward	Neami National
Daphne Smith	BAPHC
Estelle Jay	BAPHC
Clark Ward	BAPHC
Kim Rudd	BAPHC
Gary Brennan	Mayor of City of Bunbury

APOLOGIES

Rob Holmes	Alliance Housing WA
Sandy O'Neill	Alliance Housing WA
Adele Farina	MP
Colin Holt	MP
Don Punch	MP
Elizabeth Mettam	MP
Mick Murray	MP
Louise Stokes	Shire of Nannup
Lucy Bourne	Shire of Donnybrook
Jennifer Boon	Westpac Bank
Malcom Osborne	Acting CEO, City of Bunbury
Des Duplex	Vickery Accounting
Russell Smith	MyPlace
Richard Arnold	MyPlace

Alliance Housing's 2017 AGM was held on October 18 2017, at the Alliance Housing Board Room.

Reports were presented to the meeting by Chairperson Judy Jones, Executive Officer Mike Bateman, and Treasurer Paul Connell.

Mike highlighted a number of points to the meeting, including:

- Meeting with Minister Peter Tinley in November 2017
- Admiral Inn – Owner looking to repurpose.
- Royalties for Regions has withdrawn money for Donnybrook project
- Margaret River project. Discussions with Just Homes and with the Augusta Margaret River Council.
- Expanded Alliance Housing boundaries, with 10 units at Narrogin now renovated and seven occupied. Alliance Housing is working with local police, Housing Authority and Homecare.
- Discussion regarding existing housing opportunities in Northam, York & Quairading.
- Exploring further issues with Bunbury/Busselton Shires managing housing, offering alternatives.
- Brunswick Junction housing awaiting further action.

Mike also thanked the Board and Staff for their tireless work in achieving significant growth and sustainability.

In his presentation, Paul highlighted Alliance Housing's first time in reaching a turnover of \$1 million, as well as an increase of 6.8% over the previous year. He also spoke about expenses rising 12.9%, mainly due to Council rates and loan interest payments, and Alliance Housing having equity over \$4 million, with a \$199,000.00 surplus.

Paul congratulated the Alliance Housing staff on their efforts throughout the year, making special mention of Kay Shaw's financial competence.

A question was raised by the Bunbury Aged Persons Housing Collective (BAPHC), regarding the figure of \$34,000 in 'Accumulated Funds'. It was explained that this was introduced by BAPHC for long term maintenance for 141 Forrest Ave, Bunbury.

BAPHC also requested clarification concerning the figure of \$5,000 under the Administrative Expenses 'Repairs, Maintenance & Sundries' figure. It was specified this was for office repairs, maintenance, informed annual Property Maintenance expenditure of \$78,720, and long-term maintenance of \$74,689.00.

The Business Plan as tabled was adopted, as a requirement of the National Regulatory Scheme for Community Housing (NRSCH).

A constitutional change, specifying that upon dissolution, Alliance Housing assets will transfer to a like-minded organisation or Housing Authority, was moved and carried as part of the process of required for Alliance Housing to apply for Tier 2 status.

Elections were held for the new board, with the following results:

Chairperson: Jan Pedersen

Nominated: Paul Connell

Seconded: Christine Penny — Accepted/Carried

Treasurer:

Paul Connell Re-nominated — Accepted/Carried

Committee Members:

Andrew McRobert Re-nominated — Accepted

Doug Wenn Re-nominated — Accepted

Sandy O'Neill Re-nominated — Accepted

Christine Penny Re-nominated — Accepted

Clark Ward Nominated — Accepted/Carried

Keryn Curtis Re-nominated — Accepted

Peter Proctor Re-nominated — Accepted

Welcome to Clark Ward from the Bunbury Aged Persons Collective

Des Duplex was appointed as auditor for the financial year ending in June 2018.

Two items of general business were discussed:

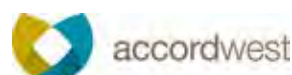
Kim Rudd of Bunbury Aged Persons Housing Collective (BAPHC) told the meeting that the BAPHC have 20 units, and assets of \$4million. The BAPHC Constitution requires that assets be transferred to a like-minded organisation on wind up.

An estimated \$80-90,000 of these assets will transfer to Alliance Housing, after payment of legal costs. 11 units have "Lease for Life" tenancies under the Retirement Villages Act, which carries an obligation to maintain their guarantee for life.

Other discussions included:

- Those with Life Lease agreements be referred to as Residents
- Lease for Life residents be given assurance that Life Leases would stay in place with possible rent decreases, and that a new rental contract/agreement with Alliance Housing will be legally required
- Life Lease holders were expecting written legal assurance that their contracts will not change. Lawyers would provide a written report in 3 months.
- A lawyer had been engaged by the Collective and would be unable to advise individual residents.
- The Chairperson assured BAPHC representatives that their concerns have been minuted and all legal information would be obtained prior to handover.

Alliance Housing Valued Partners





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