**Checklist for residents**
- Review your occupation right agreement to check the date it was signed
- Agree on a date and time to view your residential unit with your operator to assess the level of work needed
- Assessment viewing takes place (remember you can have a support person present)
- Get the contact details of the person who will receive your enquiries. This may be your operator or their representative
- Receive a schedule of refurbishment work from your operator
- Agree to the level of refurbishment work
- Get a timetable for the work to be carried out
- Confirm that the work has been completed and the residential unit is ready to be marketed

**Checklist for operators**
- Review the resident’s occupation right agreement to check the date it was signed
- Agree on a date and time to view the residential unit with the resident to assess the level of work needed
- Assessment viewing takes place (remember the resident can have a support person present)
- Inform the resident who will be your contact person for the refurbishment process
- Prepare and send a schedule of refurbishment work to the resident
- Request the resident’s agreement on the level of refurbishment work needed
- Obtain quotes and send to the resident
- Request the resident’s agreement on the cost of refurbishment
- Send a timetable for the work to be carried out to the resident
- Confirm that the work has been completed and the residential unit is ready to be marketed

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**Refurbishment process for exiting residents**

1. **Resident** gives notice to leave the property
2. **Operator and resident** review the ORA* to:
   - confirm refurbishment clause
   - clarify responsibilities of both parties
3. **Resident or operator** agree date and time to view property together
4. **Assessment** takes place, with both resident and operator present
5. **Operator** produces schedule of work
6. **Resident** disagrees with:
   - the level of refurbishment
   - extent of damage
   - Operator offers mediation which may include getting a 2nd assessment
7. **Operator seeks a 2nd quote, which they provide to resident**
8. **Resident** disagrees with quotes received
9. **Disputes procedure**
   - Resident or operator continue to disagree
   - Operator obtains quotes
10. **Resident pays their share**
11. **Work is undertaken**
12. **Resident and operator agree**
13. **Operator and resident review the ORA** to:
    - confirm refurbishment clause
    - clarify responsibilities of both parties
14. **Resident agrees with proposed schedule of work**
15. **Operator** and **resident** review the ORA to:
    - confirm refurbishment clause
    - clarify responsibilities of both parties
16. **Resident or operator** give notice to leave the property
17. **Operator and resident** agree date and time to view property together
18. **Operator produces** schedule of work
19. **Assessment** takes place, with both resident and operator present
20. **Resident agrees with proposed schedule of work**
21. **Operator** obtains quotes
22. **Resident or operator** continue to disagree
23. **Operator obtains** schedule of work
24. **Assessment** takes place, with both resident and operator present
25. **Resident agrees with proposed schedule of work**
26. **Operator** obtains quotes
27. **Resident or operator** continue to disagree
28. **Work is undertaken**
29. **No refurbishment contribution in ORA, or no refurbishment required – no further action**
30. **It may be easier for an operator to correspond in writing with the resident, estate or support person. This should be agreed by both parties at the beginning of the process.”**