第三届中国老年人住房发展论坛

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Successful Seniors Housing

成功的老年人住房

The Growing Market

蓬勃发展的市场

Trends in Seniors Living
- Changing mix of housing
- Floor area and sales prices
- Market demographics
- Business Model

老年人住房的趋势
-变化中的住房结构
-房屋面积与销售价格
-市场群体
-业务模式

Factors that increase chance of sale success. Examples of award winning developments

提高销售成功率的因素。获奖开发项目范例

Important design elements

重要设计元素

Project delivery framework

项目交付框架

皇家澳洲颐养服务(RDNS)

RDNS Seniors Housing Capabilities

RDNS is one of Australia's largest, oldest and most respected aged care companies. Established in1887, it now supports more than 40,000 elderly people across Australia and New Zealand.

The organisation also has a world class call centre and telehealth capability. All of these services are in turn supported by a renowned Research and Education Institute with links to premier Australian Universities.

RDNS has assembled a team of Australia's finest experts in Seniors Housing design and management. Most of the team also have extensive international experience from the USA, Europe and the Middle East.

RDNS在老年人住房方面的能力

RDNS是澳大利亚规模最大、历史最久、声誉最高的养老护理公司之一。RDNS创建于1887年，目前为4万多名澳大利亚和新西兰老年人提供支持服务。

该组织还设立了一家世界级的呼叫中心，具备一流的远程医疗保健能力。这些服务，得到了一家与澳大利亚顶尖大学保持密切联系之知名研究教育机构的鼎力支持。

RDNS组建了一支澳大利亚老年人住房设计与管理的顶级专家团队。多数团队成员还拥有在美国、欧洲和中东地区的丰富国际工作经验。

In home care

REFERRALS

Hospitals 医院

Doctors

Individuals and families

rdns
Nursing care
Personal care
Domestic assistance

2,000,000 visits pa

40,000 clients pa

Apartments

Seniors Living Developments

Home dwellings

皇澳颐养

RDNS Seniors Housing Capabilities

RDNS can provide a range of services including:

- Specialist aged care and seniors living
- Strategic Master Planning
- Service Planning
- Project Management
- Facilities and Asset Management

RDNS Seniors Housing team have successfully designed, built and managed more than 350 award winning aged care and seniors living projects across Australia.

RDNS老年人住房能力

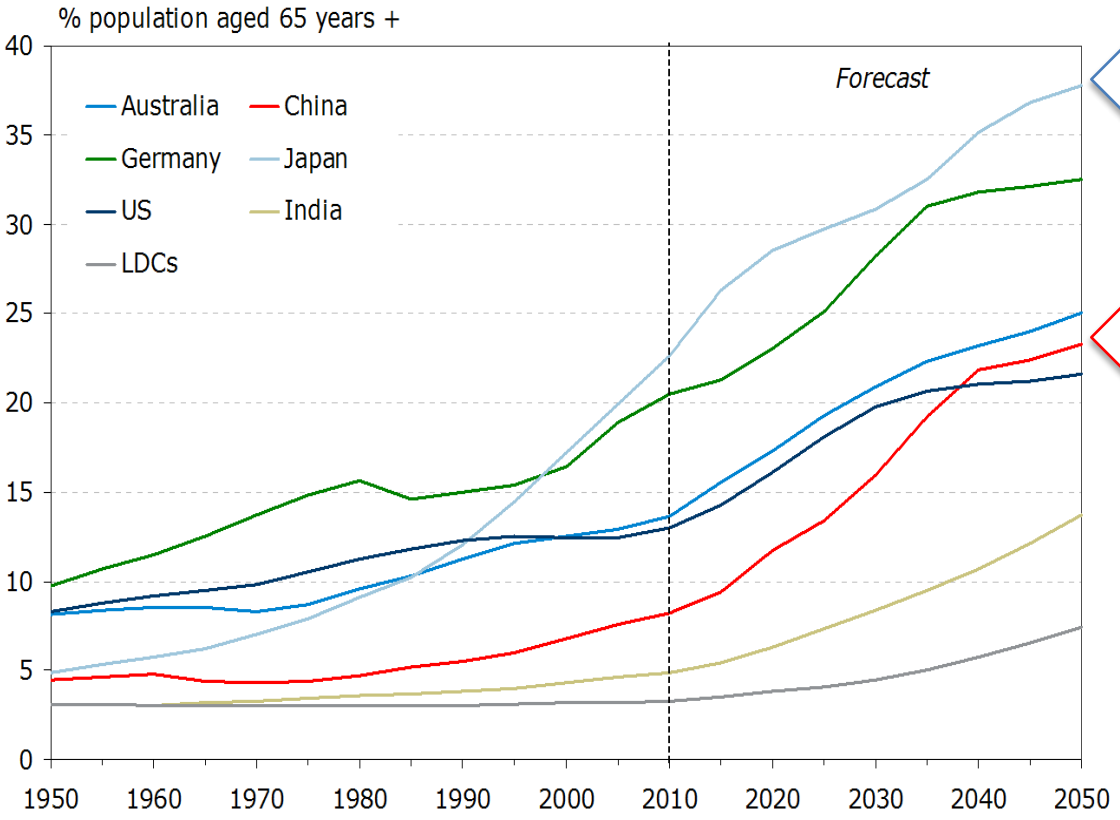
RDNS提供的一系列专业服务，包括：

- 专业的养老护理与老年人住房
- 战略性总体规划
- 服务规划
- 项目管理
- 院所与资产管理

RDNS老年人住房团队已在澳大利亚各地成功设计、建造和管理了350多个养老与老年人住房项目，并多次荣获大奖。

The pace of ageing will accelerate
There will be a greater proportion of older people in the economy

% population aged 65 years +, selected countries



Australia 澳大利亚

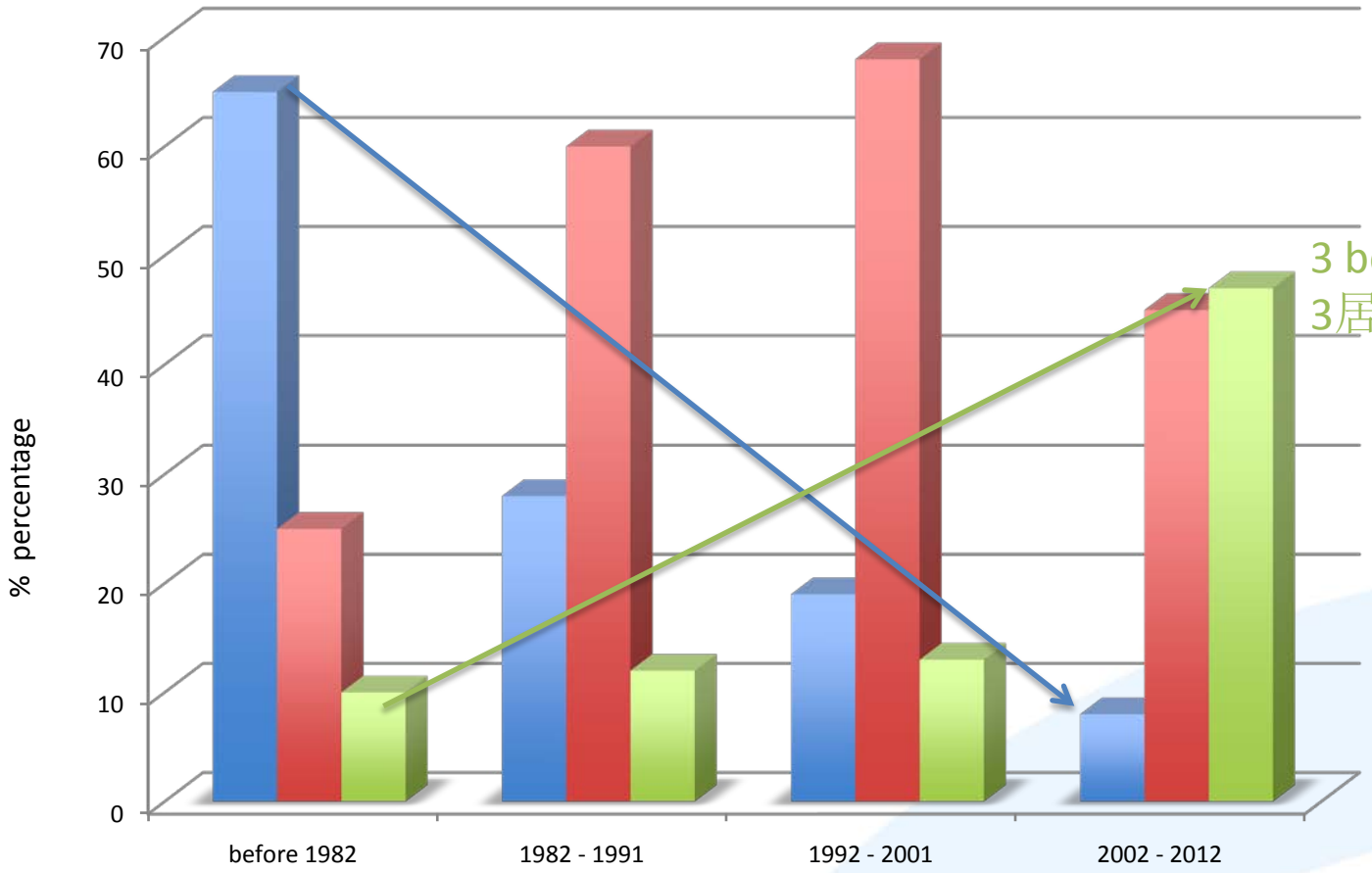
China中国 349,000,000

Note: LDCs = least developed countries
Source: United Nations 2008 medium variant forecast; Intergenerational Report 2010.

Source; Warren Hogan ANZ September 2011
资料来源： Warren Hogan ANZ，2011年9月

Percentage of Seniors Units built

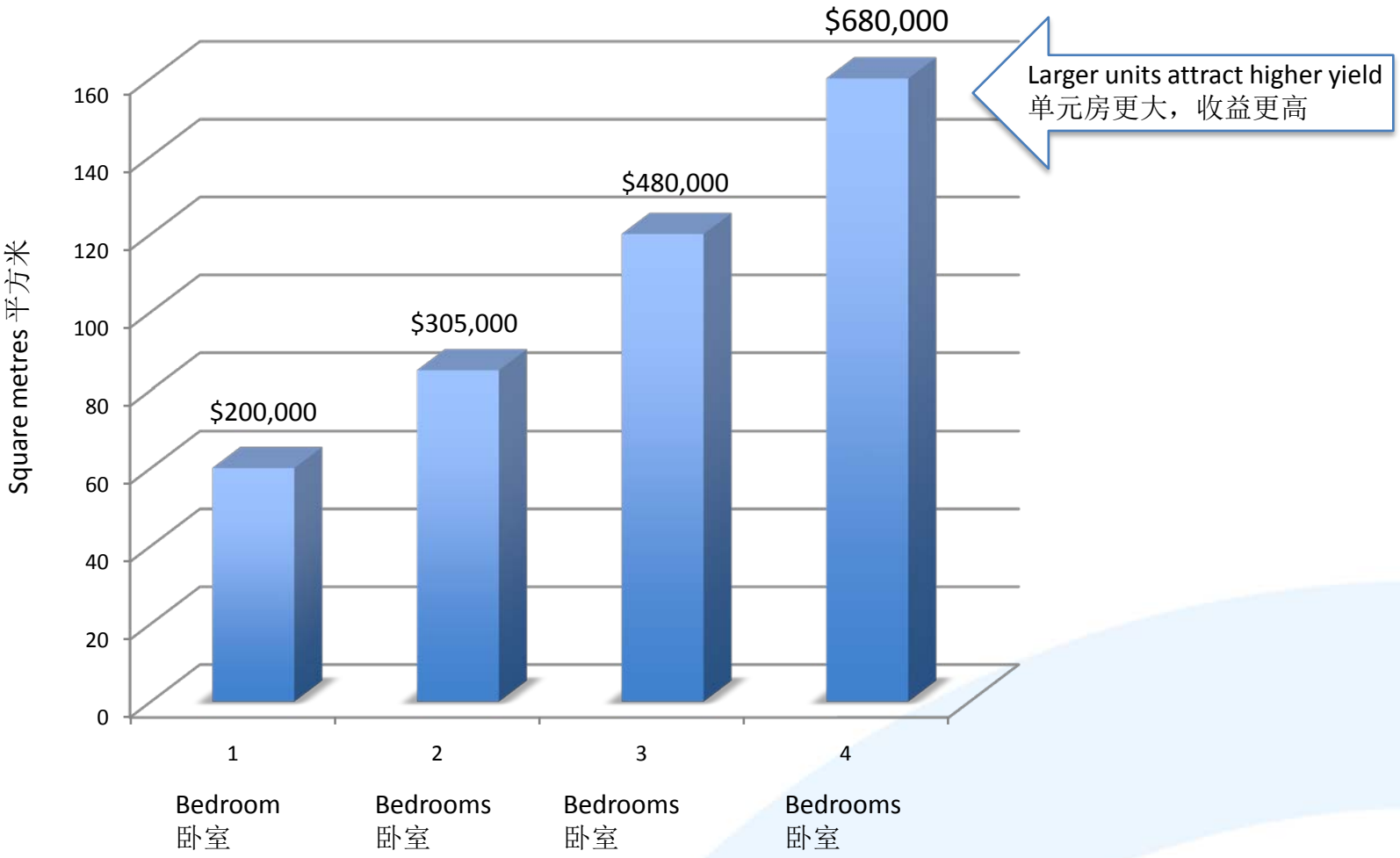
老年人单元房建成的百分比



Adapted from RVA/GT Survey 2011
摘自2011年RVA/GT调查

Internal floor area and average sale price 2011

2011年室内面积与平均销售价格



Information about the market

- 8% of people aged 65+ reside in seniors villages
- Increased market penetration expected to be 12% within 10 years
- Average age at entry is 73 years
- Average length of stay is 9 years
- More than 60% enter as a couple

市场概况

- 65岁以上的老人，8%住在老人村
- 市场渗透力日益增大，预计10年内将增至12%
- 平均入住年龄是73岁
- 平均居住年限是9年
- 60%以上是夫妻一起入住

100
100

Business Model

4% Strata Title

15% Rental

81% are Loan/Lease

-> resident “lends” developer money to lease the apartment. Example $480,000

-> the developer can earn investment income from this amount e.g interest of $25,000 pa

-> the developer also deducts a Deferred Management Fee e.g 30% deducted over 1st 4 years = $140,000

-> developer also charges weekly maintenance fees of up to $500 per week

业务模式

4%为分权房

15%为租赁房

81%为借款/租房

-> 住户以“借钱”给开发商的方式来租赁公寓。 如$480,000

-> 开发商可从这笔钱中获得投资收入，如每年$25,000的利息

-> 开发商还扣除分期管理费，如头四年扣除30% = $140,000

-> 开发商还收取每周维护费，每周约为$500

Profitability

盈利能力

3 seniors living companies with more than 70 sites

三家老年人住房公司，共计70多个场所

1. Annual Revenue $960M
   Net profit after tax $337M

1. 年营业收入 $9.6亿
   税收净利润 $3.37亿

2. Annual Revenue $805M
   Net profit after tax $201M

2. 年营业收入 $8.05亿
   税收净利润 $2.01亿

3. Annual Revenue $350M
   Net profit after tax $121M

3. 年营业收入 $3.5亿
   税收净利润 $1.21亿

Derived from 2011/12 accounts + Caution the 3 examples are not necessarily comparable because of different accounting treatments & different mix of seniors living/aged care/development underway

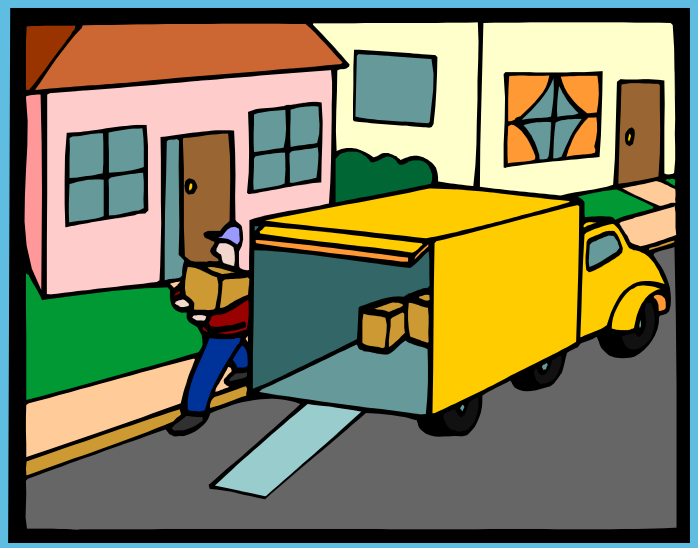
摘自2011/12年度账目+ 注意：由于会计处理方式不同，且目前在建的老年人住房/养老护理院所/开发项目不同，因此3个例子没有绝对可比性

Factors to increase chance of sales success

Understanding why people decide to move into seniors living

提高销售成功率的因素

了解民众为什么决定搬入老年人住房



Reasons why people choose to move to seniors housing

选择搬入老年人住房的原因

"Pull" factors

- Affordable (28%)
- Unit & village design (26%)
- Close to family & friends (22%)
- Services available (8%)
- Close to public transport (4%)
- Other (12%)

"吸引"因素

- 费用低廉(28%)
- 单元与老人村设计(26%)
- 靠近家人和朋友(22%)
- 所提供的服务(8%)
- 邻近公共交通(4%)
- 其他(12%)

Adapted from Centre for Research into Sustainable Urban & regional futures UQ/RVAA survey data

摘自可持续城市与区域未来研究中心UQ/RVAA调查数据

Reasons why people choose to move to seniors housing

选择搬入老年人住房的原因

"Push" factors

- Health reasons or need assistance (23%)
- Home too hard or expensive to maintain (21%)
- Loss of partner (11%)
- Need to be closer to family (10%)
- Did not feel safe in home (10%)
- Lonely (5%)
- Other (20%)

"推动"因素

- 健康原因或需要协助(23%)
- 住房无法维护或维护费用昂贵(21%)
- 配偶去世(11%)
- 希望更靠近家人(10%)
- 觉得在家不安全(10%)
- 孤独(5%)
- 其他(20%)

Residents priority of services

住户希望的优先服务

85%

- 24 /7 emergency system
- Reputable staff and management
- Lock Up garage
- Community Centre
- Nursing home/aged care
- Village bus
- Social activities
- Serviced apartments
- Internet access
- Library
- Games room
- Swimming Pool
- Bowling
- Workshop
- Gymnasium

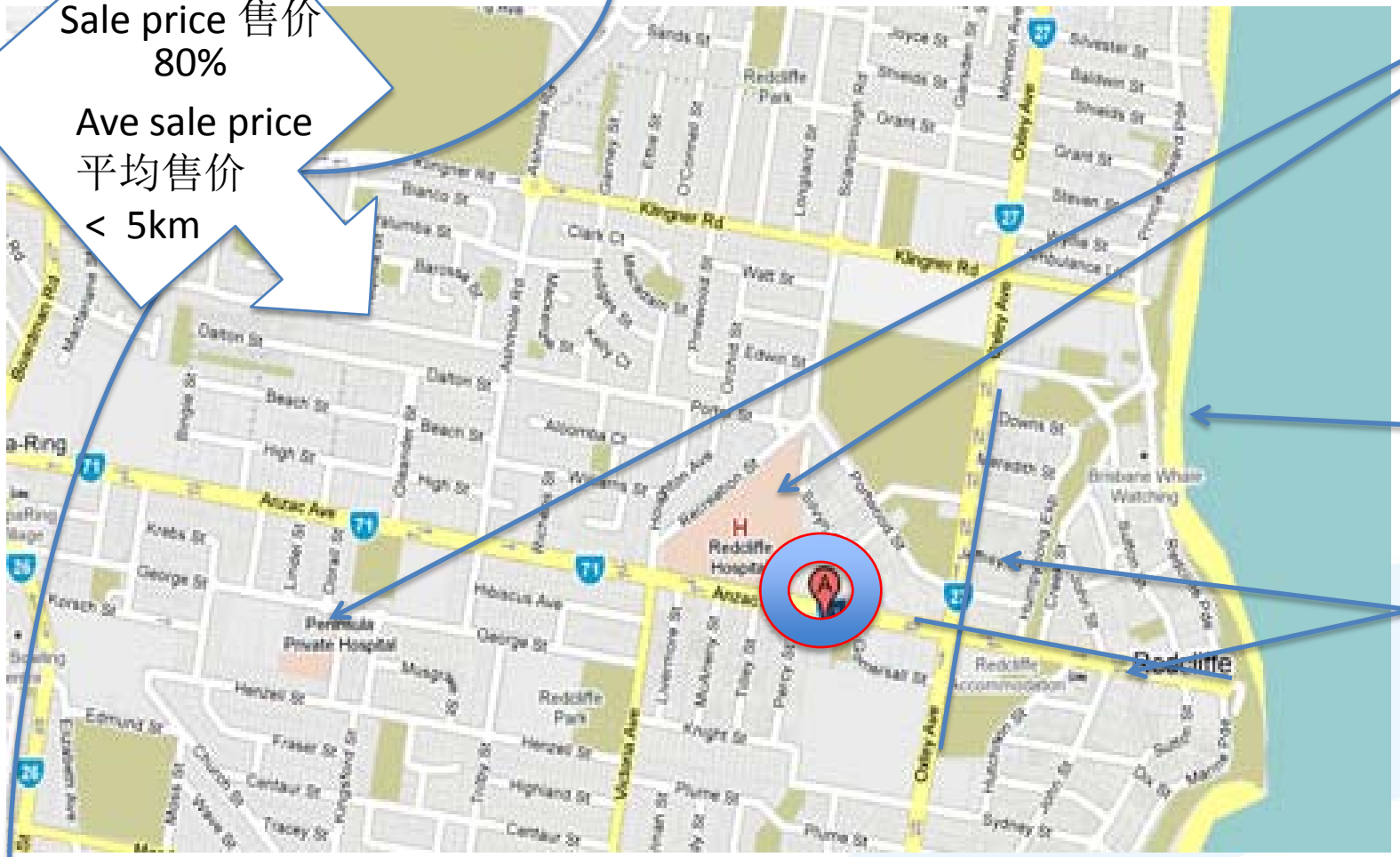
8%

- 全年365天应急体系
- 声誉良好的员工与管理人员
- 上锁车库
- 社区中心
- 疗养院/养老护理
- 老人村巴士
- 社交活动
- 酒店式公寓
- 互联网接入
- 图书馆
- 游戏室
- 游泳池
- 保龄球
- 工作间
- 健身馆

Importance of location
选址的重要性

Sale price 售价
80%

Ave sale price
平均售价
< 5km



Hospitals
医院

Beach
海滩

Shops
商店

Importance of design surrounding houses Brisbane

周边房屋设计的重要性
布里斯班

Brisbane Seniors development

布里斯班老年人住房项目

Stylish, easy care apartment living

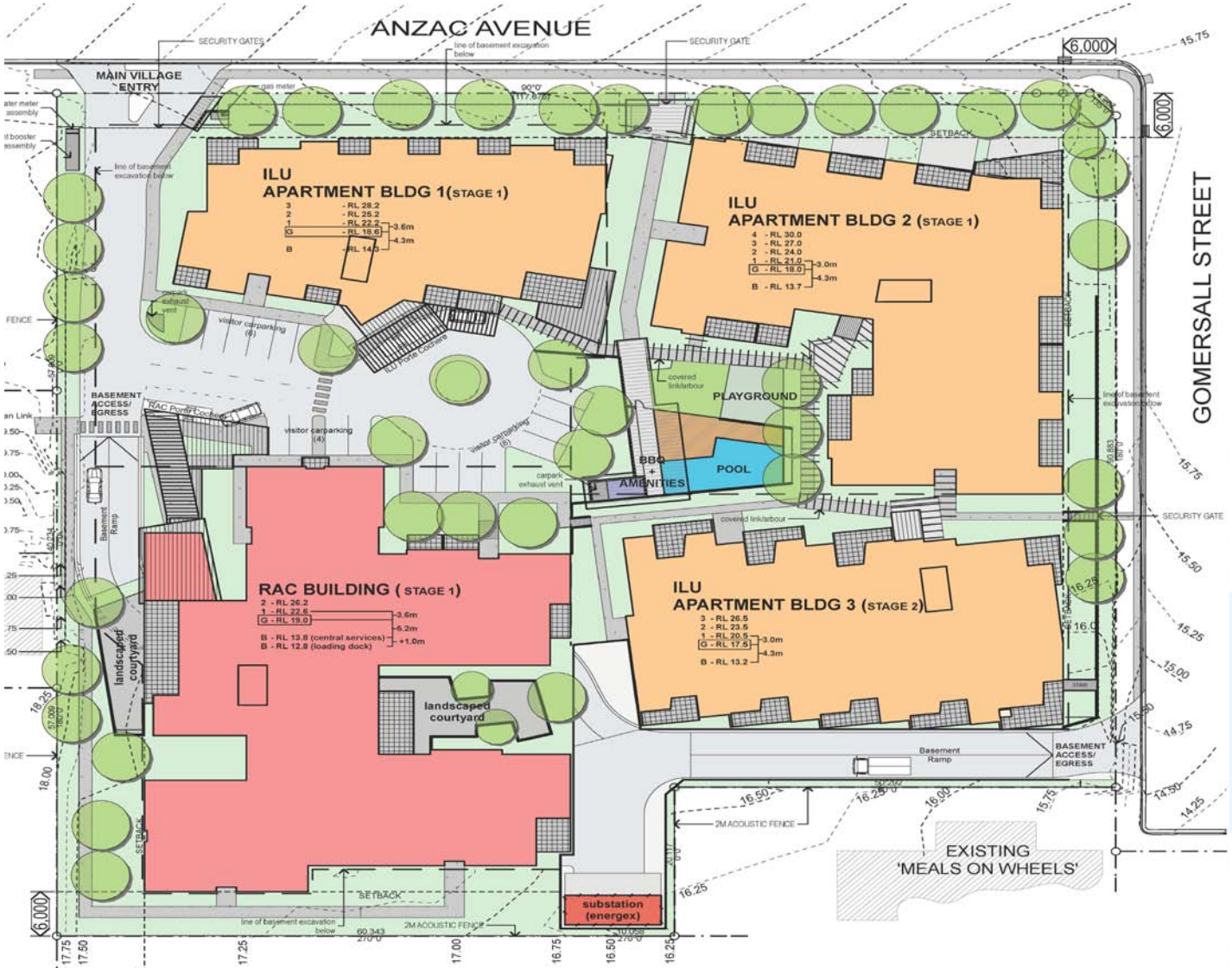
On-site café and function room

Be pampered at the hairdressing salon

Enjoy the heated pool and outdoor entertaining area

- 96个床位的住宿型养老院所
- 22个专人服务的住宿公寓
- 100个独立居住单元
- 21个访客停车位
- 163个安全的地下停车位
- 休闲娱乐中心，包括：
  - 咖啡厅
  - 游泳池
  - 野餐区
  - 游乐区
  - 美发厅/日间温泉
  - 健身馆
- 社区护理服务提供：
  - 理疗
  - 职业疗法
  - 言语疗法
  - 脚病治疗
  - 营养指导
  - 社会工作
  - 音乐疗法
  - 心理咨询
  - 运动生理学
- 居家护理中心

Brisbane Seniors Living Site #1　布里斯班老年人住房区#1



- 96 bed Residential Aged Care facility
- 22 Supported Accommodation Apartments
- 100 Independent Living Units
- 21 visitor car parks
- 163 secure basement car parks
- Recreation Centre including:
  - Café
  - Swimming Pool
  - BBQ area
  - Playground area
  - Hairdresser / Day Spa
  - Gymnasium
- Community Care Services providing:
  - Physiotherapy
  - Occupational therapy
  - Speech Therapy
  - Podiatry
  - Dietician
  - Social work
  - Music therapy
  - Psychology
  - Exercise physiology
- In-home Care hub

2 Bedroom	95 m2
2居室	95 平米

3.0 * 3.9 平米

3.4 * 3.3 平米

7.3 * 4.3 平米

14平米

3 Bedroom	89 m2
3 居室	89 平米

3.6 * 3.2 平米

10 平米

7.3 * 4.3 平米

3.5 * 3.0 平米

3Bedroom 115m2

3居室 115平米

4.2 * 3.4 平米

+ 17 平米

7.3 * 4.4平米

3.9 * 3.0 平米

Gold Coast Housing

黄金海岸住房

Gold Coast senior housing
Awarded project

黄金海岸老年人住房
获奖项目

rdns
by your side

rdns
by your side

rdns
by your side

rdns
by your side

rdns
by your side

Design reflecting city Melbourne

设计体现城市文化墨尔本

Sale price ranges from $960,000 to $1.4M

售价$96万至$140万

High quality finishes
优质装修装饰

Private Restaurant
私人餐厅

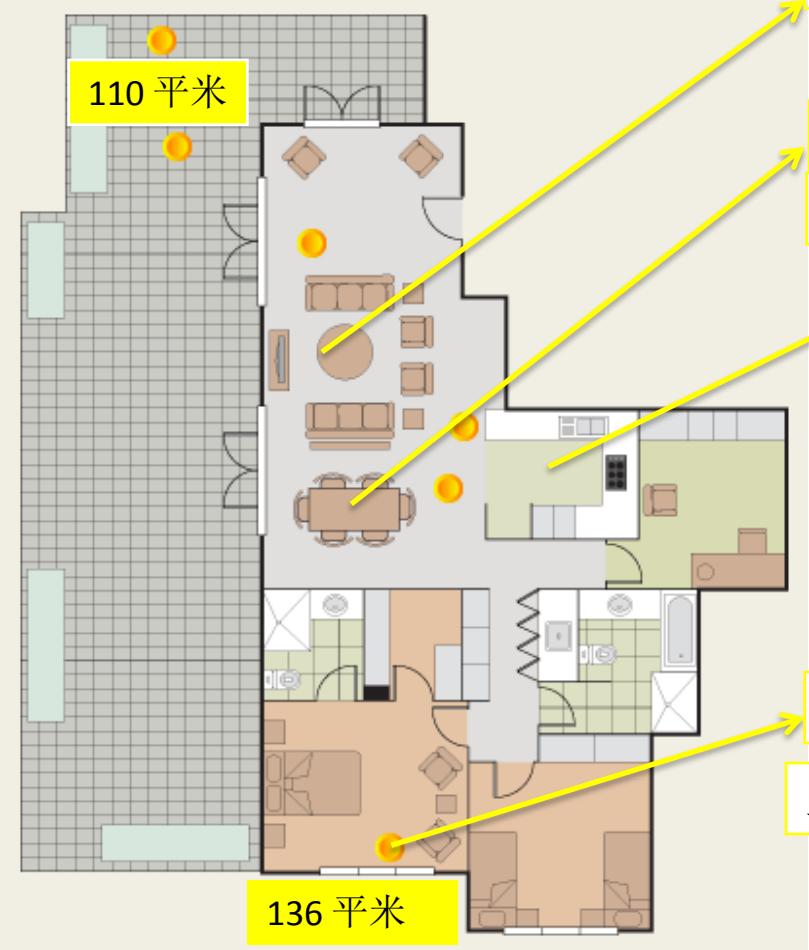
Library plus Business Centre
图书馆兼商务中心

Gymnasium
健身馆

Indoor swimming pool
室内游泳池

2 Bedroom + study

2居室+书房



Lounge 5.1 * 4.9 m2

客厅5.1 * 4.9 m2

Meals 4.6m@ * 4.7m2

餐厅

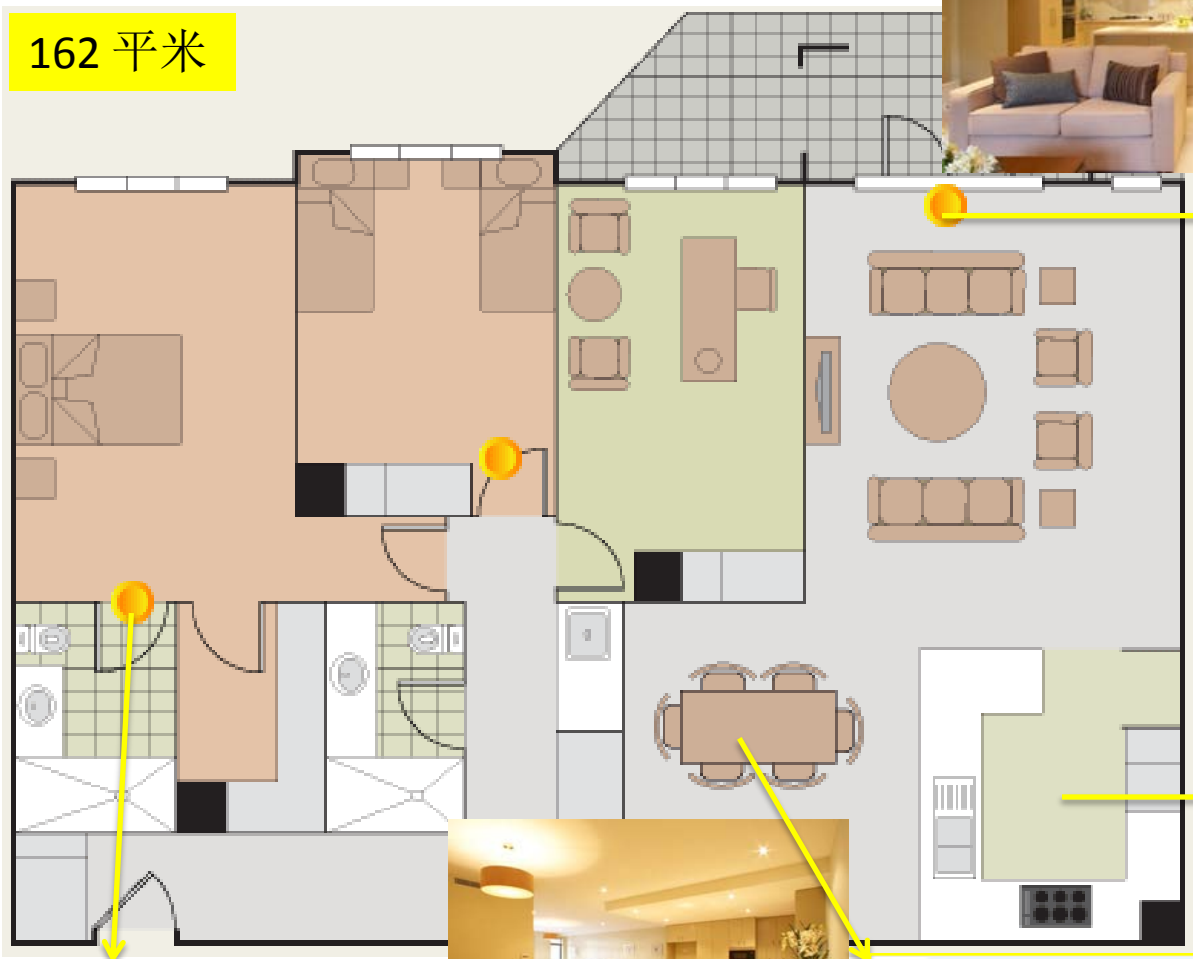
Kitchen 2.7 * 3.2 m2　厨房4.6m@ * 4.7m2平米

Main Bed room 3.5 * 4.3

主卧3.5 * 4.3

3 bedroom　3居室

162 平米

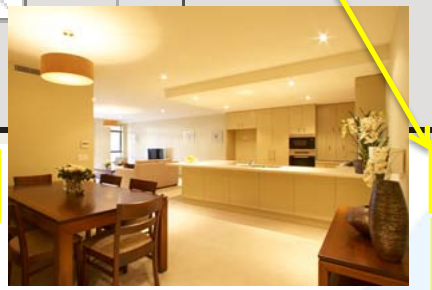


Lounge 5.8 * 4.6 m2

客厅5.8 * 4.6 平米

Kitchen 3.6 * 3.2 m2

厨房3.6 * 3.2 平米



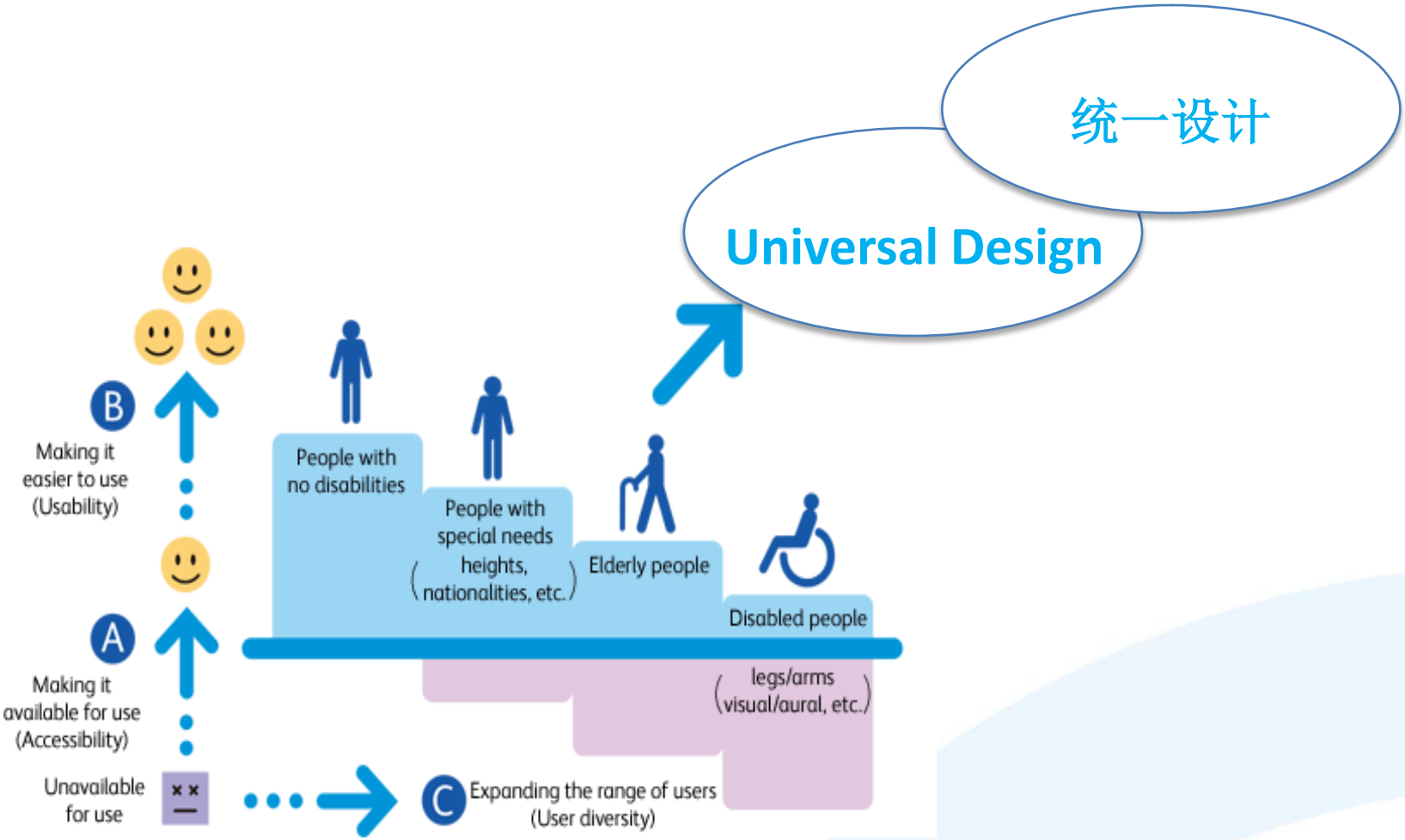
M bed room 5.2 * 3.4 m2

主卧5.2 * 3.4 平米

Meals 3.2 * 2.9 m2

餐厅3.2 * 2.9 平米

实行老年人住房统一设计



Key Design Considerations

- Universal housing is practical and flexible and will meet the needs of people of different ages and abilities over time

- Key universal design considerations include:
  - Direct and level access from car parking to house
  - Wide front door
  - Wide internal doors
  - Wide corridors
  - Main facilities on ground level
  - Circulation space in the living room
  - Space in the bedroom
  - Bathroom designed for easy independent access
  - Space in the kitchen
  - Space in the laundry
  - Low window sills

设计主要考虑因素

- 统一设计的住房具有实用性和灵活性，能够满足不同年龄段和能力之民众的需求

- 统一设计的主要考虑因素包括：
  - 从停车场同层直接无障碍进入房屋
  - 宽大正门
  - 宽大内门
  - 宽敞走廊
  - 主要设施布置在底层
  - 起居室的流通空间
  - 卧室空间
  - 浴室设计方便独立进出使用
  - 厨房空间
  - 洗衣房空间
  - 窗台低

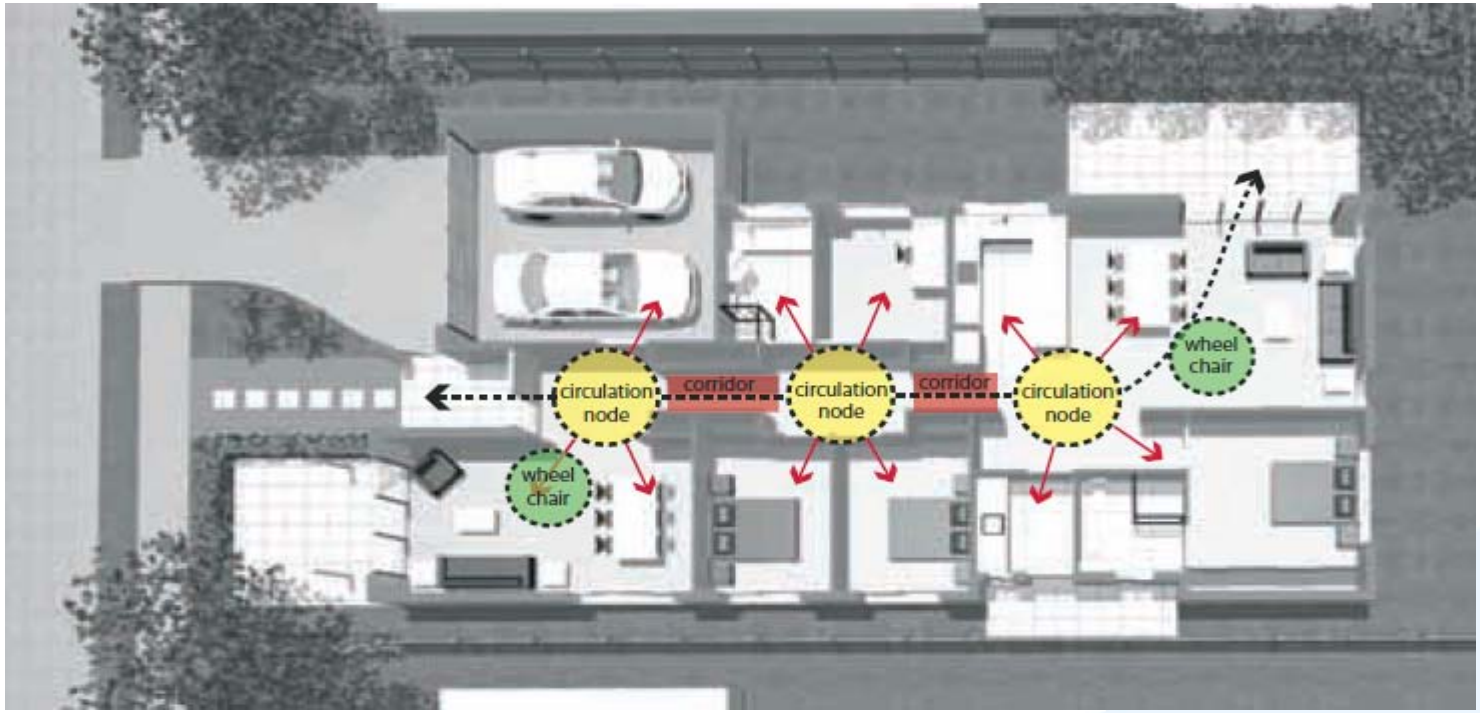
Key Design Considerations

设计主要考虑因素

Examples of Universal Housing design elements

统一住房设计元素示例

- Wide corridors and circulation space 宽敞的走廊和流通空间



流通节点：这套房围绕着3个流通节点来设计规划
走廊更短：流通节点之间的走廊更短
进房通道：从起居区直接进入
起居室流通：直接连接流通节点和轮椅区

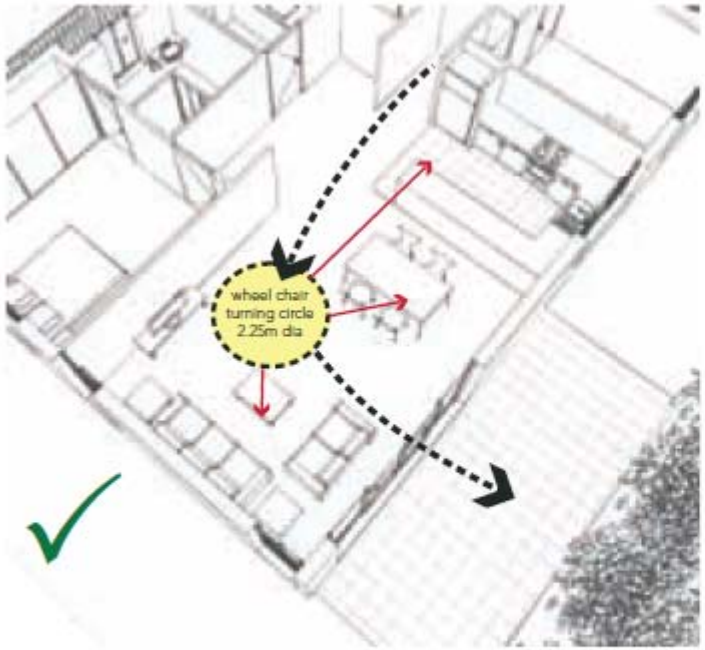
Key Design Considerations

设计主要考虑因素

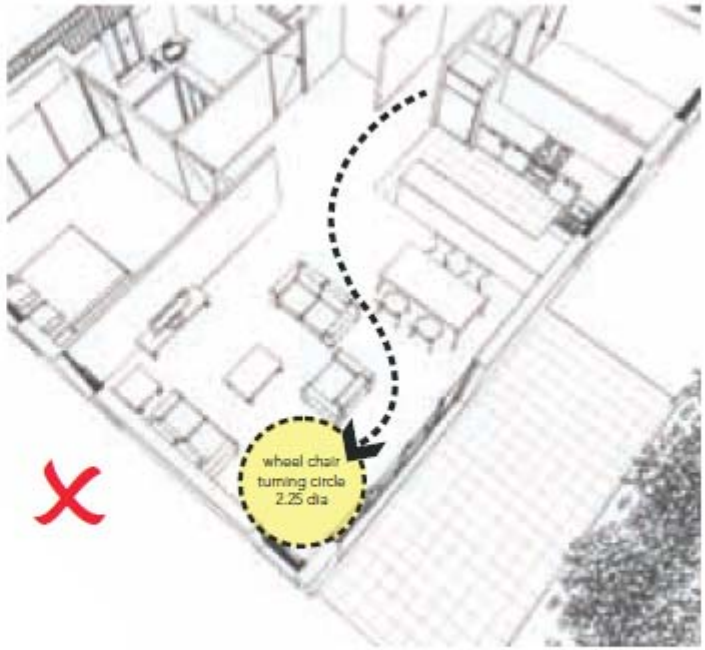
Examples of Universal Housing design elements

统一住房设计元素示例

- Circulation space in living room 起居室流通空间



Wheelchair turning space is located centrally allowing for full participation in activities in the kitchen, living and dining areas and is also accessed directly from the general circulation path through the house.



Turning space positioned in the far corner of the living room is illogical.

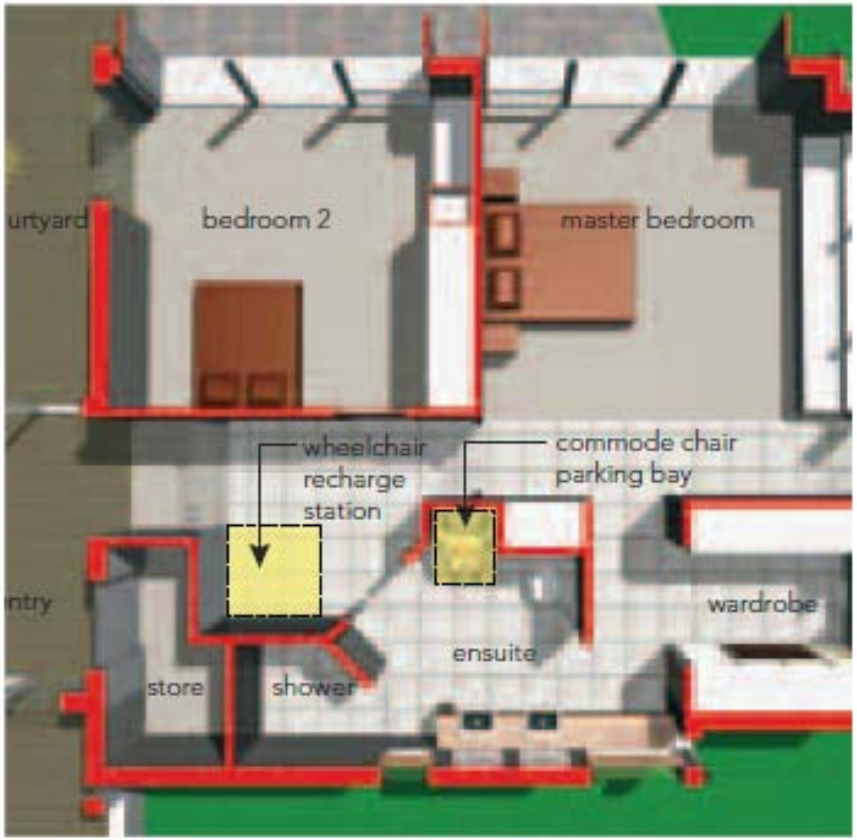
Key Design Considerations

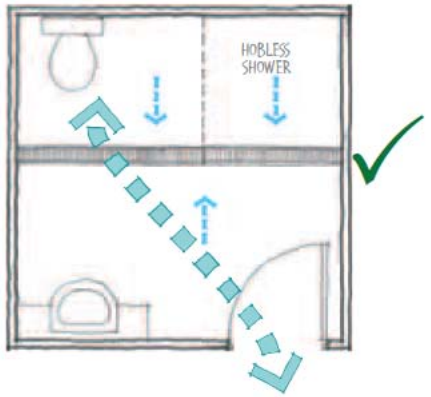
Examples of Universal Housing design elements

设计主要考虑因素

统一住房设计元素示例

- Bathroom designed for easy and independent access
- 浴室设计方便独立进出使用





Floor wastes: A grated drain can be used for both the shower and general drainage.

Floor wastes: Falls associated with floor waste positions can inhibit easy movement through the bathroom.

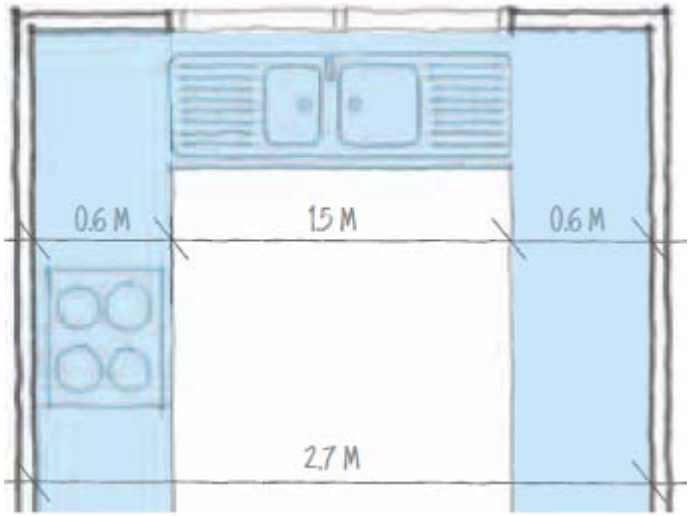
Key Design Considerations

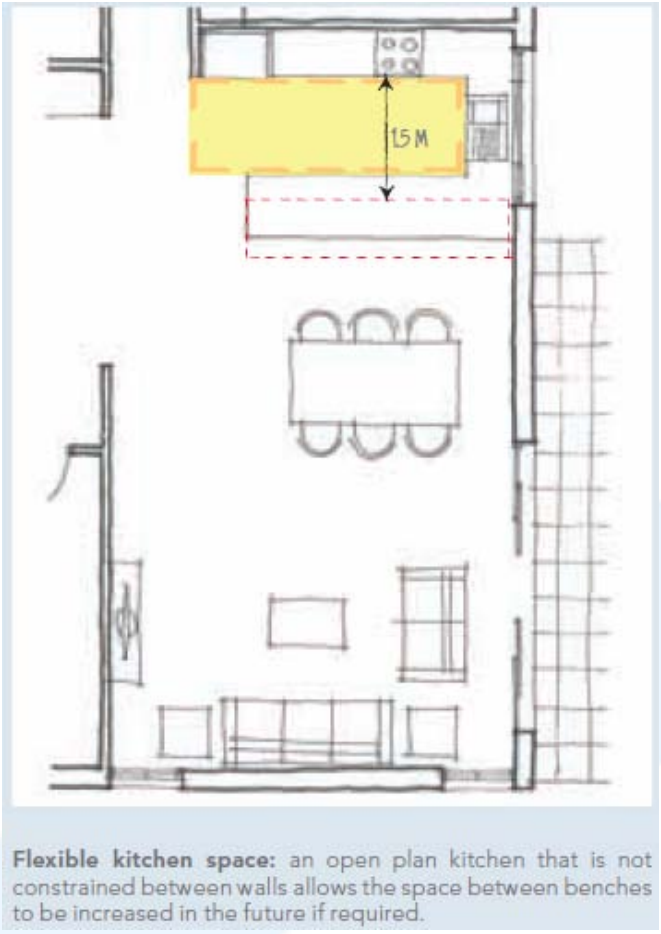
设计主要考虑因素

Examples of Universal Housing design elements

统一住房设计元素示例

- Enough space in the kitchen
- 厨房有充足空间





Flexible kitchen space: an open plan kitchen that is not constrained between walls allows the space between benches to be increased in the future if required.

Other Design Principles for Seniors Housing

Age-friendly housing and neighborhoods have a positive effect on seniors health, wellbeing and quality of life

Seniors have strong preference to age in their own homes and communities

Seniors villages enable “ageing in place”, prevent loneliness, promote social inclusion, offer lifestyle choice and support independent living

Good design principles for Seniors Housing must:

1. Engage with wider community
2. Create and sustain social environments
3. Provide care and support which maximises autonomy
4. Support the physical/mental/spiritual lives of residents
5. Provide economically and environmentally sustainable services

老年人住房其他设计原则

适合老年人的住房和邻里环境，会对老年人的健康、幸福和生活质量带来积极影响

老年人非常喜欢在自己的家里和社区度过老年生活

老人村能带来“原居安老”，防止老人孤独，促进社会包容，带来生活方式选择并支持独立生活

老年人住房的良好设计原则必须：

1.融入广泛社区

2.创造和维护社交环境

3.提供能够最大限度提高自理能力的护理和支持

4.支持居民的身体/心理/精神生活

5.提供经济与环境可持续服务

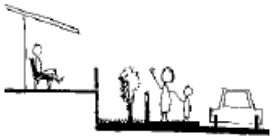
Other important design principles for seniors

老年人住房
其他重要设计原则

1 Engaging with the Wider Community

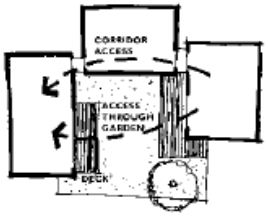
1 融入更广泛的社区

1.1 Easy Access to the Wider Community

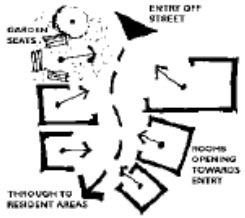


1.2 Visual Links

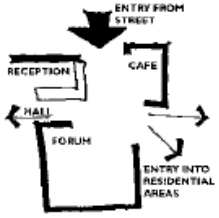
1.3 Separate Buildings Interwoven with Other Facilities



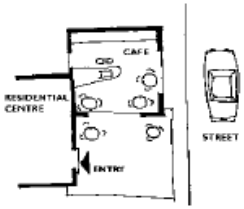
1.4 Both Indoor and Outdoor Connections Between Buildings



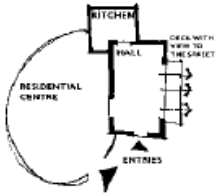
1.5 A String of Activities Lead into a Centre



1.6 Central Forum as a Focus



1.7 A Cafe at the Entry



1.8 Public Access Hall

- Design assists residents remain part of community life
- Design enables parts of seniors village to be used by people from the surrounding neighbourhood
- Design integrates seniors village into the local area

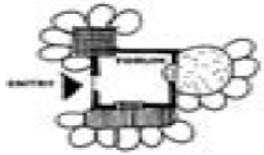
- 设计要协助居民融入社区生活
- 设计要让老人村的设施也能让周边邻里使用
- 设计要将老人村与本地区域结合在一起

Other important design principles for seniors

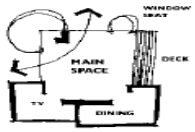
老年人住房其他重要设计原则

2 Creating + Sustaining Social Environments

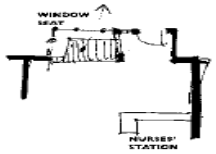
2 创造和维持社交环境



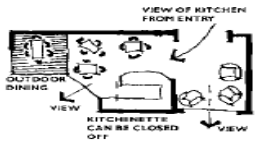
2.1 Residential Clusters



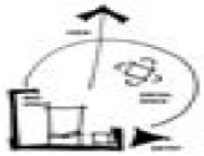
2.2 Main Space as a Focus of Activity Areas



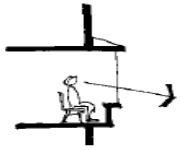
2.3 A Main Entrance



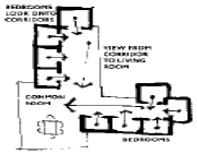
2.4 Eating as a Focus of Life



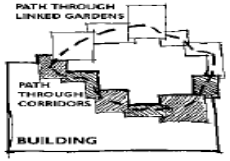
2.5 A Bedroom as a Person's Home



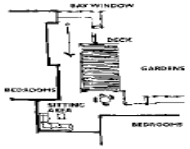
2.6 A Window Overlooking Activity



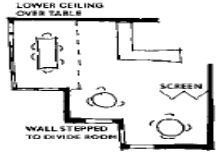
2.7 A View of the Corridor from Bedrooms



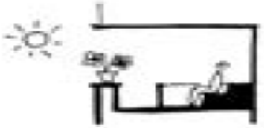
2.8 Events along the Path



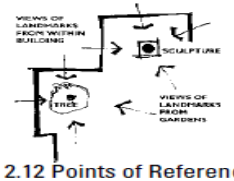
2.9 Integrating Sitting Nooks



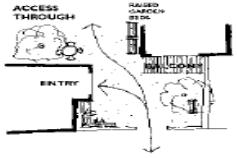
2.10 Appropriate Scale of Rooms



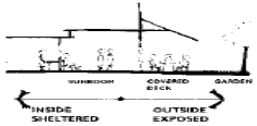
2.11 Bathing Places



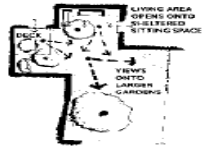
2.12 Points of Reference



2.13 Active Garden Space



2.14 Layering the Edge of a Building



2.15 Hierarchy of Open Space

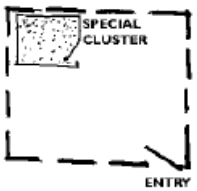
- Design creates good 'community households' being small clusters of residents that make up the immediate neighbourhood and social fabric of the village
- Design provides for internal and external spaces for activities, recreation facilities, areas to meet with families and friends, areas where children can play, have birthday parties, etc

- 设计要创造良好的“社区家庭”，成为居民小集群，构成老人村的直接邻里和社交结构
- 设计要能创造内外部活动空间、娱乐设施以及与家人朋友团聚的区域，以及儿童游玩、生日聚会的区域等

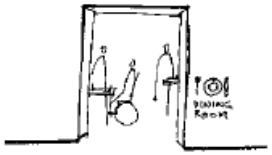
Other important design principles for seniors

老年人住房其他重要设计原则

3 Providing Environments which Maximise Autonomy 3 提供发挥最大自主性的环境

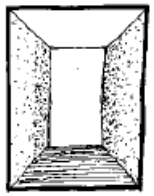


3.1 A Supportive and Safe Environment



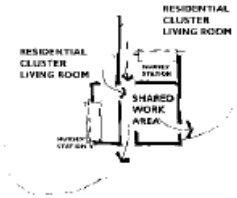
3.2 Multiple Cues

3.3 Reducing Unwanted Stimuli



3.4 Varying Light Levels and Colour

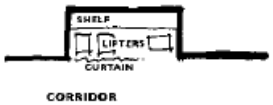
3.5 Familiar Fittings



3.6 Presence of Staff Support

3.7 Staff Vision

3.8 Staff Retreat



3.9 Adequate Storage Spread Through a Centre

- Design creates environments that enable people to do as much for themselves as possible, for as long as possible
- Housing designed as 'universal housing' being homes which are practical and flexible and which meet the needs of residents of different ages and abilities over time
- Design provides for a safe and secure environment for residents from intruders and which is achieved through use of fences, retaining walls, landscaping and building placement

- 设计要创造出一个能帮助居民尽可能多、尽可能久地自己做事的环境
- 设计成“统一住房”，是指具有实用性和灵活性的住房，满足不同年龄和能力之居民的需求
- 设计要为居民创造一个不受干扰的安全环境，可以通过使用栅栏、隔墙、景观和建筑布局来实现

Other important design principles for seniors

4 Supporting the Physical/Mental/Spiritual Lives of Residents

- Buildings, facilities, gardens and grounds have the capacity to enhance the physical/mental/spiritual lives of residents

- Buildings, facilities, gardens and grounds must be designed so as to promote:
  - the physical wellbeing i.e. gymnasium, tennis court, swimming pool, putting green, lawn bowls, etc;
  - the mental wellbeing i.e. areas for meditation, tai chi, yoga, garden for quiet contemplation, areas for quiet conversation with family, friends and staff;
  - the spiritual wellbeing is personal, both in what we do and how we do it. It might involve organised payer, worship, meditation, time in nature or a host of other activities

- Seniors villages encourage intergenerational participation an interaction with residents and provide child play equipment and dedicated play areas

老年人住房其他重要设计原则

4 支持居民的身体/心理/精神生活

- 建筑、设施、花园和场地，能够强化居民的身体/心理/精神生活

- 建筑、设施、花园和场地的设计必须要能促进：
  - 身体健康，即健身馆、网球场、游泳池、球洞区、 草地滚球场等；
  - 心理健康，即心理辅导、太极、瑜伽区域、静想园、与家人、朋友和工作人员安静谈话的区域；
  - 精神健康是指个人所做的事及其做事方式方面的状态。它包括有组织的祈祷、礼拜、坐禅、与自然相处或其他多种活动

- 老人村鼓励居民跨代互动，提供儿童游乐设备和专用游乐区

老年人住房其他重要设计原则

Other important design principles for seniors

Other important design principles for seniors

老年人住房其他重要设计原则

5 Provide Economically and Environmentally Sustainable Services

- Sustainability is understood as creating a balance between social, financial and environmental issues to ensure long-term viability
- Effectively addressing environmental sustainability through design can reduce operating and maintenance costs
- Buildings that are designed and constructed from carefully selected materials, pay regard to climate and location will also last longer
- Buildings that support viable communities, enhance the social life of residents and create sensitive relationships with the surrounding environment will continue to attract residents and provide for them into the future

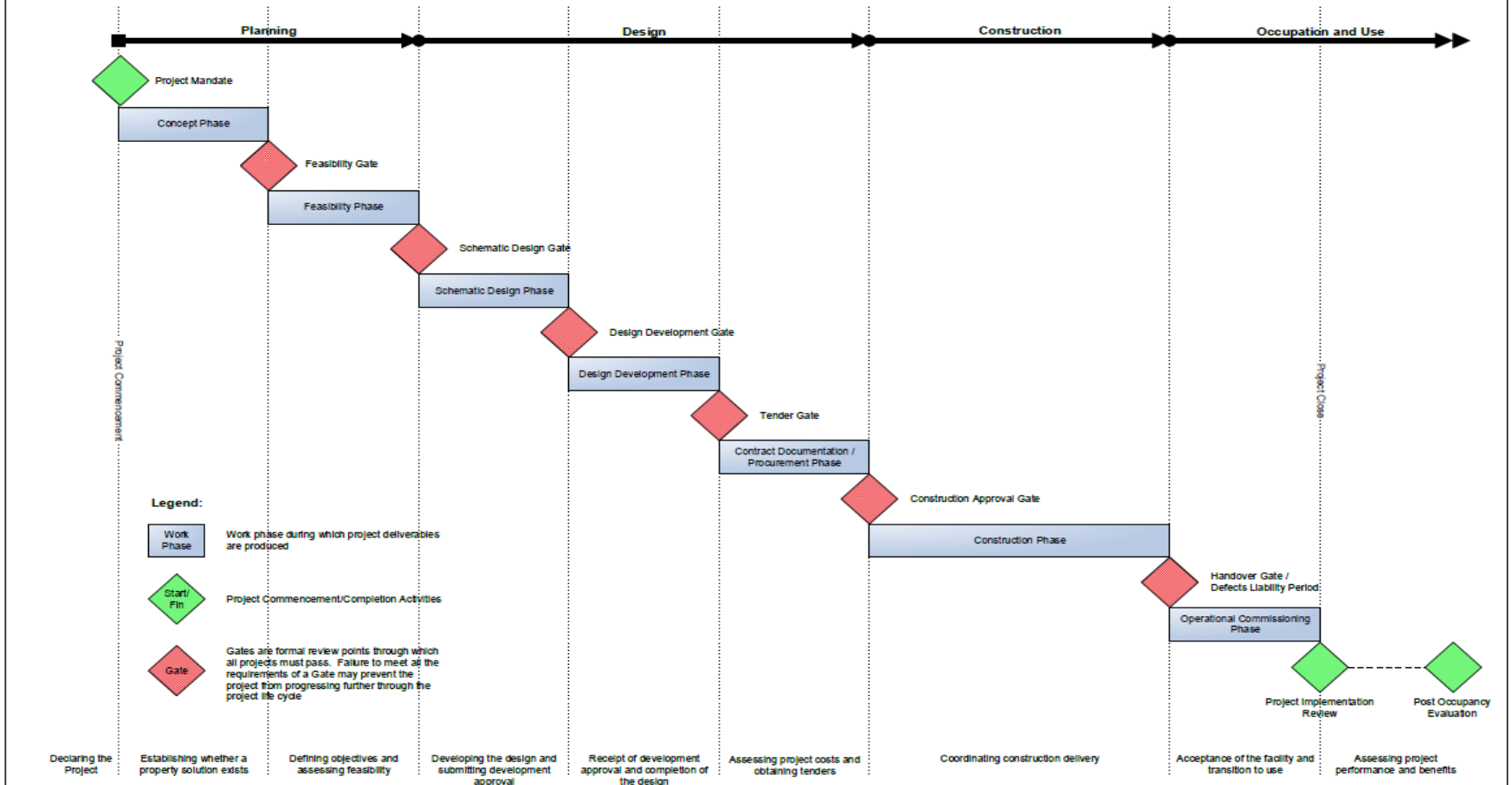
5 提供经济与环境可持续服务

- 可持续被理解为在社会、经济和环境事务中达到平衡，保证长期可行性
- 通过设计来有效解决环境可持续性，能够降低经营和维护成本
- 精心设计及精心挑选材料来建造建筑，并充分考虑气候和位置因素，也有助于延长建筑寿命
- 有利于社区活力、强化居民社交生活并与周边环境建立敏感关系的建筑，能够继续吸引居民，为他们创造未来美好生活

Project Delivery Framework

项目交付框架

RDNS PDF - OVERVIEW



Rev No	Date	Revision Details	By	Approved
1	Apr 12	Second Issue	JM	SM
0	Feb 10	First Issue	JM	SM

Drawn: RDNS	Signed	Date: April 2012	Drawing Title: Project Delivery Framework – Overview
Reviewed: J Mantis	Signed	Date: April 2012	Drawing No: 001
Approved: S Muggleton	Signed	Date: April 2012	Scale: Not To Scale
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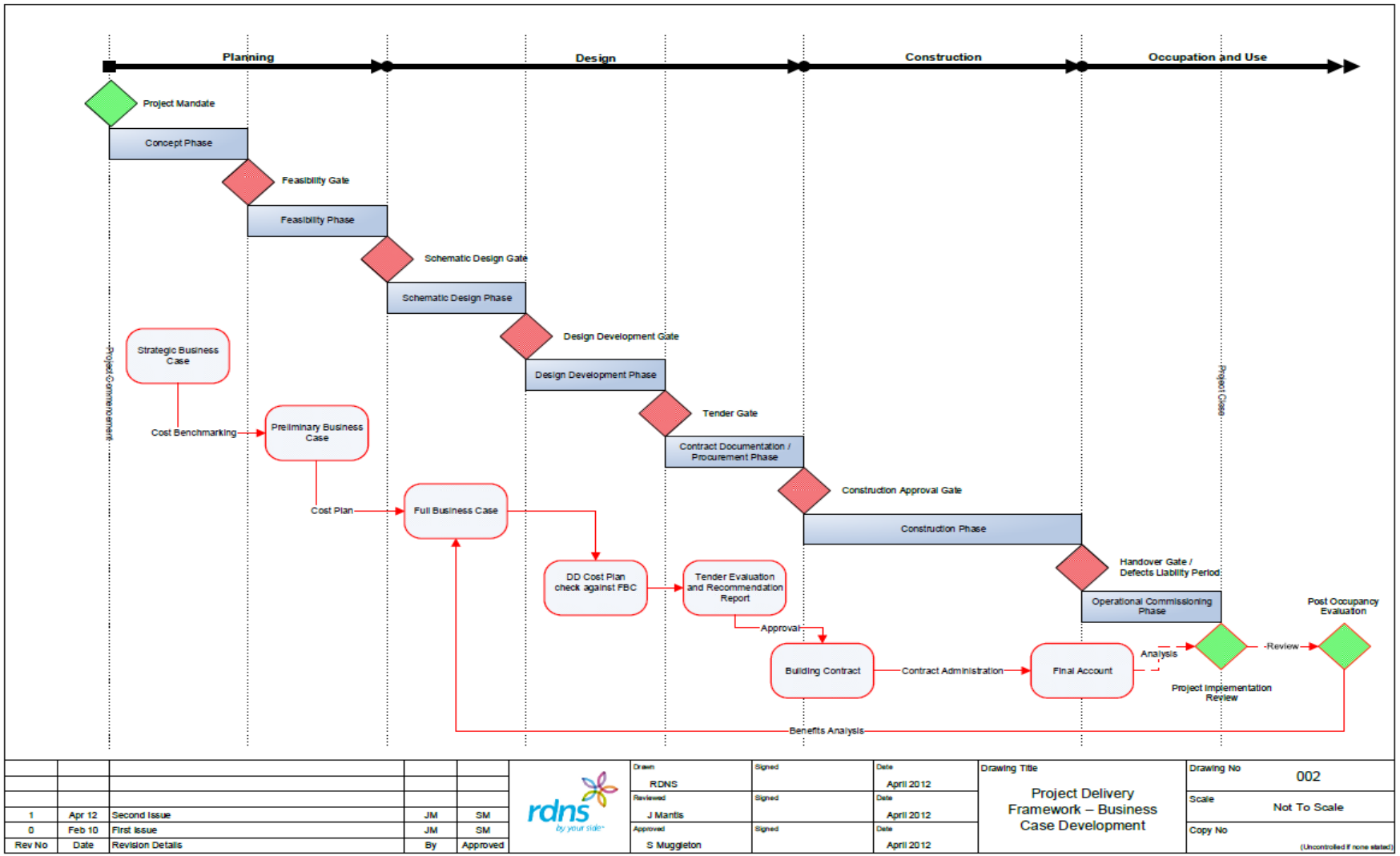
Project Delivery Framework

项目交付框架

RDNS PDF - BUSINESS CASE DEVELOPMENT



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Drawn	RDNS	Signed	Date April 2012
Reviewed	J Mantis	Signed	Date April 2012
Approved	S Muggleton	Signed	Date April 2012

Drawing Title: Project Delivery Framework – Business Case Development

Drawing No: 002

Scale: Not To Scale

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Project Delivery Framework

Overview

- The Project Delivery Framework identifies a set of 'tools' for project managers to use in the working up and delivery of projects.
- Project Managers ensure the principles of the Project Delivery Framework are applied in a manner appropriate to the scale, value and level of business risk associated with each project
- The Project Delivery Framework proceeds through the project life cycle in a sequential manner

Purpose

- The Project Delivery Framework provides a practical guide to the effective delivery of projects.
- It ensures that all projects pass through a common, controlled, process to ensure consistency of outputs.
- In this way, projects are continually tested against the business strategy to ensure that only the most robust of projects are built and accepted into the operation.

Scope

- The Project Delivery Framework applies to all major capital projects involving the design and construction of new or refurbished facilities.
- The Project Delivery Framework can be applied to capital projects of any size and/or complexity.

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项目交付框架

概况

- 项目交付框架能鉴别项目经理在逐步开展和交付项目过程中所使用的一整套“工具”。
- 项目经理确保根据每个项目的规模、价值和商业风险水平来执行相应的项目交付框架原则。
- 项目交付框架按照顺序贯穿整个项目寿命周期。

目的

- 项目交付框架为项目的有效交付提供了实用指南。
- 它确保所有项目都经历通用、受控的流程，确保项目成果的一致性。
- 通过这种方式，就能根据业务战略来持续检测项目，确保只有最牢固的项目才会建设并投入运营。

适用范围

- 项目交付框架适用于所有涉及新建或翻新设施之设计与施工的大型基建项目。
- 项目交付框架可适用于任何规模和/或复杂度的基建项目。

rdns Services 皇家澳洲颐养服务

- Expert consultancy and management of seniors living developments, including:-
  - Feasibility studies
  - Master planning
  - Design
  - Development management
  - Project management, and
  - Staff training
- Employs the executive team from Australia's largest seniors living and aged care company

- 老年人住房开发项目的专家顾问与管理服务，包括：
  - 可行性研究
  - 总体规划
  - 设计
  - 开发管理
  - 项目管理，以及
  - 员工培训
- 聘用澳大利亚最大老年人住房与养老护理公司的高级管理团队

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