



# HOUSING MANAGER

# TRAINING PROGRAM

First Nations



Developing Effective Policies

First Nations

DEVELOPING EFFECTIVE POLICIES

64020



# HOUSING MANAGER TRAINING PROGRAM

First Nations



DEVELOPING  
EFFECTIVE POLICIES

Participant's Manual

Participant's Workbook

# CMHC—HOME TO CANADIANS

Canada Mortgage and Housing Corporation (CMHC) is the Government of Canada's national housing agency. We help Canadians gain access to a wide choice of quality, affordable homes.

Our mortgage loan insurance program has helped many Canadians realize their dream of owning a home. We provide financial assistance to help Canadians most in need to gain access to safe, affordable housing. Through our research, we encourage innovation in housing design and technology, community planning, housing choice and finance. We also work in partnership with industry and other Team Canada members to sell Canadian products and expertise in foreign markets, thereby creating jobs for Canadians here at home.

We offer a wide variety of information products to consumers and the housing industry to help them make informed purchasing and business decisions. With Canada's most comprehensive selection of information about housing and homes, we are Canada's largest publisher of housing information.

In everything that we do, we are helping to improve the quality of life for Canadians in communities across this country. We are helping Canadians live in safe, secure homes. CMHC is home to Canadians.

Visit us at [www.cmhc.ca](http://www.cmhc.ca)

You can also reach us by phone at 1 800 668-2642

(outside Canada call 613 748-2003)

By fax at 1 800 245-9274

(outside Canada 613 748-2016)

Canada Mortgage and Housing Corporation supports the Government of Canada policy on access to information for people with disabilities. If you wish to obtain this publication in alternative formats, call 1 800 668-2642.

## **Acknowledgements**

CMHC acknowledges the valuable contributions of the Anokiiwin Training Institute from Winnipeg, Manitoba, in developing the First Nations Housing Managers curriculum. Particular thanks to their staff members Jay Cowan, Ray Starr and Nedra Andersen.

**Photos courtesy of Indian and Northern Affairs Canada and Health Canada**



First Nations Housing Manager Training Program

## **DEVELOPING EFFECTIVE POLICIES**



**PARTICIPANT'S MANUAL**



## TABLE OF CONTENTS

<b>Overview of the Housing Manager Training Program</b> . . . . .	3
Making Workshops work for you . . . . .	5
Putting it all into perspective . . . . .	6
Developing effective policies—Overview . . . . .	7
Chapter One—Policies and procedures—The complete package . . . . .	8
Putting policies to good use . . . . .	8
Developing effective policies . . . . .	12
Making policies for the right reasons in the right way . . . . .	19
Chapter Two—Developing and writing procedures . . . . .	20
Putting policies to work through proper procedures . . . . .	20
A procedure for writing procedures . . . . .	21
Putting it all together in one big package . . . . .	22
Chapter Three—Putting policies and procedures to good use . . . . .	23
Appendix 1—Policy-making policy . . . . .	24







## Overview of the Housing Manager Training Program

The construction and maintenance of affordable, quality housing is a priority issue for First Nations across Canada.

### A positive partnership

Your Housing Manager Training Program is the result of an innovative partnership between Canada Mortgage and Housing Corporation (CMHC) and Anokiiwin Training Institute.

Indian and Northern Affairs Canada (INAC), Western Economic Development (WED) and Human Resources and Skills Development Canada (HRSDC) supported the partnership. The result is a highly focused, culturally relevant, challenging and rewarding training program targeted to the specific needs of First Nation Housing Managers just like you.

### The Housing Manager Training Program

The primary objective of the First Nations Housing Manager Training Program is to help Housing Managers strengthen the skills and experience they now have and to help them develop new skills through a combination of classroom and hands-on learning.

### Strengthening the capacity of First Nations Housing Managers

As First Nations regain more control over governance and administration of their own affairs, Housing Managers take on increased responsibility for all elements of First Nation housing programs. High-quality training, with a special focus on the broad range of skills that Housing Managers need to effectively manage housing, is a great help to individuals in developing and strengthening the skills they need for their role.

The ability of Housing Managers to effectively manage housing programs, projects and activities depends in large part on their knowledge and skills and their commitment.

This Module, “Developing Effective Policies,” is part of a comprehensive training program specifically designed to help Housing Managers acquire the knowledge and develop the skills they need to put their commitment to positive use.

The Housing Manager Training Program gives you the opportunity to develop practical management skills that are based on a combination of theory and practical application. The specific objectives are to provide:

- First Nation Housing Managers with the practical knowledge and skills they need to manage programs, projects and activities
- an introduction to general, transferable management concepts and theories

Housing programs include programs started or sponsored by First Nations, governments and government agencies and private organizations. Housing programs are usually long-term and often focus on more than one goal.

Housing projects include short-term activities that have defined start and end dates. The activities include specific actions that support the achievement of housing programs and projects. They usually focus on a single goal or a few goals.

Helpful Hint



- a culturally relevant learning experience for First Nation Housing Managers
- practical, professional development for Housing Managers that fits into work schedules and takes as little time as possible away from their communities and work

The Housing Manager Training Program is made up of a number of individual modules. Together, the modules are a complete training program. Separately, each module is an individual workshop.

This highly interactive approach to learning new skills encourages you to test new ideas, fine-tune skills and share experiences and expertise with other Housing Managers in a supportive learning environment.

The Housing Manager Training Program is delivered through traditional and innovative learning activities, including

- facilitated classroom training in both urban and community-based programs
- facilitated workshops (an average of one week of workshops every month on an ongoing basis) delivered through both urban and community-based programs
- a combination of both classroom training and facilitated workshops

The developers of the Housing Manager Training Program are now working on Internet-based, self-paced, computer-based, independent study workshops.

Successful participants will be better managers of all types of housing program activities, including operation, construction, maintenance, financial management and client counselling.

The Housing Manager Training Program depends upon a blend of quality curriculum, professional delivery and your motivation. The fact that you are taking part in the Workshops clearly shows that you are motivated to learn and that you are committed to doing the best job possible.

## Training that works for you

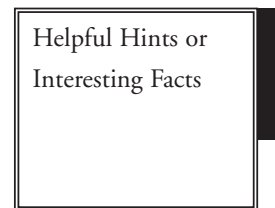
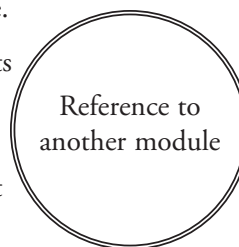
The Housing Manager Training Program recognizes that there is a need for common understandings that can be translated into relevant activities for all First Nation Housing Managers. You will learn the basic theory behind many of the duties and responsibilities that all Housing Managers share. Practical exercises in each workshop give you the opportunity to try out that theory on specific issues you must deal with in your own community.

This is what the “**Helpful Hints**” and “**Interesting Facts**” boxes look like.

This is what a reference to another module looks like.

The *Participant Manuals* are DETAILED reference documents to use in the workshop.

Their real value comes later, when you return to your community and your job. The Manuals are a permanent reference you can refer to time and time again in response to community issues, problems and opportunities.



**PARTICIPANT'S MANUAL**

Each *Participant's Manual* includes

- a Table of Contents
- an overview of the Housing Manager Training Program
- an overview of the entire Module
- an overview of each Chapter
- reference to exercises, test, quizzes and projects
- “Interesting Facts” and “Helpful Hints”
- references to other Modules for information on specific subjects
- an optional glossary or list of words and terms with their definitions

Each *Participant's Workbook* includes real-life exercises and activities. These hands-on exercises ensure you understand how to apply the theory you are learning to your own circumstances. Completing the exercises and activities with other participants gives you a chance to learn from each other as you share common concerns and seek advice on individual problems.

Each *Participant's Workbook* includes:

- a Table of Contents
- an explanation of each exercise or project with instructions on completing it
- exercise sheets to complete
- reference to where information on that exercise or project is located in the *Manual*
- a Workshop Evaluation Form

Workshop facilitators will review how to make the best use of specific *Participant's Manuals* and *Workbooks* at the start of each workshop.

### **Making workshops work for you**

In most cases, the Housing Manager Training Program is delivered through individual workshops on specific topics. The curriculum and exercises for the workshops are designed specifically for a workshop presentation. Making the best use of those materials requires your full participation.

The general guidelines for the workshops include:

- confirming attendance requirements for the workshop (usually required by the sponsor)
- requirements for passing quizzes and tests and completing exercises and projects (usually required by the sponsor)
- start time, break times, lunch time and finish time
- procedures for group discussions, exercises and individual work
- respect for other participants
- appropriate use of facilities



- sharing ideas and comments constructively
- any emergency procedures
- other guidelines set by the sponsor or the group

The workshop facilitator will review these guidelines and discuss any additional rules your group feels will help your workshop work better. You should make certain that you know and meet your sponsor's requirements.

You will get out of the workshops what you put in. Workshops are designed to encourage you to be actively involved—and to encourage the others in your workshop to take an active part. Each of you has his/her own experience and expertise to share. Your active involvement makes the best use of those experiences and knowledge.

### **Putting it all into perspective**

The Housing Manager Training Program is more than just learning new things for the sake of learning itself.

The program helps Housing Managers do their work better and more effectively. It does not end there. The program also helps you, as a Housing Manager, to help all the people in your community enjoy access to affordable, healthy, high-quality, well-maintained housing.

For more information on the First Nations Housing Manager Training Program, please contact your regional Canada Mortgage and Housing Corporation office.



## Developing Effective Policies—Overview

Developing effective policies, procedures and practices is an important responsibility of Housing Managers. This workshop reviews what a Housing Manager must consider when developing policies, procedures and practices.

- understand the basic elements of effective policies, procedures and practices
- develop ways to work with First Nation and housing organization decision-makers to make effective policies
- involve stakeholders in policy-making and implementation of those policies
- write effective policies, procedures and practices
- implement policies consistently and fairly
- ensure policies, procedures and practices are followed
- keep policies, procedures and practices relevant and up-to-date

While First Nations and housing organizations can operate without written housing policies and procedures, operations are much more efficient and effective with them in place.

Housing Managers should encourage and assist community leaders, staff and stakeholders to develop and implement a full range of policies and procedures for all housing projects, programs and related activities.

Every organization works better with realistic policies that are supported by relevant procedures and practices. Developing effective policies and procedures requires a consistent approach to making the housing organization's goals and general practices specific guidelines and instructions.

During this workshop, you will review why a housing organization needs policies and procedures, and how to develop and implement them.

At the end of the Workshop, you should be able to determine what policies are needed for your First Nation and how to develop and implement a full package of policies and procedures for your housing organization.

### ***Exercise 1—Participant introductions***

In this exercise, you introduce yourself to the other workshop participants. Your facilitator will explain how to make the introductions.

### ***Exercise 2—Participant expectations***

In this exercise, you list what you hope to learn in this workshop. These expectations will be recorded on a flip chart and posted so we can refer to them throughout the program. Be prepared to discuss your expectations with the other participants.



## Chapter One—Policies and procedures—The complete package

### Overview

This chapter reviews the key steps in developing, writing and using a full package of housing policies.

At the end of this chapter, you will be able to

- describe the general purposes of policies
- describe how policies help decision-makers and staff manage housing projects, programs and related activities
- explain how to prepare a process for developing housing policies for your First Nation
- list common housing policies for First Nations
- describe how to implement First Nation housing policies

Policies and procedures are the foundation of any effective housing organization. They provide guidance for the overall goals (policies) and for general and detailed directions on carrying out general and specific activities (procedures). Putting housing projects, programs and related activities in place effectively depends on a complete and thorough combination of policies, procedures and practices.

Policies are statements that explain in general terms

- what an organization wants to do
- why it wants to do it
- how it wants to do it

Policies start with good, understandable, clear decisions based on the organization's

- mission
- vision
- values
- ethics
- objectives

### Putting policies to good use

Policies focus on general issues by identifying

- **Goals**—*what* the First Nation and its housing organization generally want their housing projects, programs and activities to achieve
- **Results and outcomes**—*why* the First Nation and its housing organization want to achieve those goals
- **Individual policies**—*how* the First Nation and its housing organization will reach their goals.

Policies are guidelines that direct decision-makers and the staff who deliver the programs of an organization. Policies explain the organization's general approach and what clients and stakeholders can expect from the organization.



## PARTICIPANT'S MANUAL

Policies differ from community to community and situation to situation. They can be written or unwritten. They can follow a standard format or be prepared individually. They can be developed as part of an overall policy manual or as stand-alone policies. They can vary in language type. They can include different levels of detail.

### **Exercise 3—Review of existing policies**

In this exercise, list your First Nation's policies for housing-related or other programs. Be prepared to discuss your list with other participants.

There are many different ways to develop, document and implement policies.

CMHC has a comprehensive guide of sample policies for Aboriginal housing organizations. INAC can also advise about common policies for First Nation housing programs. (Contact your nearest CMHC or INAC office for copies of the guides.) Many First Nations will share information about their housing policies with other First Nations. Housing organizations serving other groups, such as non-profit groups and housing co-operatives, also have policies that can be used as models.

Reviewing typical housing policies can help a First Nation develop its own policies. Reviewing other organization's policies helps decide what policies are suitable for a specific housing program. Often, another organization's policy which has a very similar form and which contains much the same wording can be used.

But there is more to developing a strong set of policies than just writing your organization's name in another organization's policy. You should carefully review the other organization's policy and modify to ensure that it fits your circumstances.

A policy is not truly effective if it is not “owned” by the First Nation. Copying other policies does not create the ownership needed to make policies work. Reviewing and adopting existing wording for policies is only a start. Each First Nation must fully consider and approve every policy as if it was developed from scratch.

Table 1 shows some typical policy areas for a housing organization.

Policy area	Includes
<b>Organization</b>	Mission statement Terms of references for housing programs Goals Purpose Composition Appointment of directors Accountability Powers Meetings Right to make a presentation Duties and responsibilities of the housing organization Decision-making procedures Appeal procedures for decisions



**PARTICIPANT'S MANUAL**

Policy area	Includes
<b>Financial</b>	Financial management of housing funds Accounting requirements for revenues and expenditures Spending limits for the housing organization staff Petty cash accounts Requirements for keeping financial records Reporting requirements for financial matters Audit procedures
<b>Administrative</b>	Record-keeping requirements
<b>Human resources</b>	Human resources management for housing organization and staff General provisions for housing units
<b>Tenant rights and responsibilities</b>	Location of housing units Rent requirements Security deposits Ownership of housing units Sale of housing units The right to occupy a unit Leasing requirements Termination of leases Vacating of units Tenants rights and responsibilities Eviction of tenants Training for tenants of housing units Occupancy standards for housing units Selection process for housing units
<b>Housing projects and programs</b>	Procurement of materials and labour Material purchasing by householders Emergency maintenance Awarding of contracts Applications for new units or major renovations Housing construction, repair and renovation programs Tendering requirements Contracting requirements Use of local labour, materials, services and equipment Construction of housing units Repair of housing units Renovation of housing units Death of a householder Vacating of units in poor condition

**Table 1 - Typical policy areas**





### **Exercise 4—Analysis of policy requirements**

In this exercise, you develop a list of typical First Nation housing policies to determine the status of and the need for policies for your First Nation. Be prepared to discuss your list with the group.

In most cases, all housing-related policies are collected in a policy manual or handbook. This helps people find policies when they need them. Policy manuals and handbooks should include a complete table of contents to make them easy to use.

A housing organization can put policies about a specific area in a separate publication. For instance, policy about tenant rights and responsibilities could be printed as a booklet for tenants. Contracting and tendering policies can be packaged to give to bidders.

Often, a Band Council or housing organization asks the housing manager to develop new policies or change existing policies. Policies can also be developed by

- external consultants
- teams of First Nation managers of different programs
- staff committees
- committees of tenants
- stakeholder committees
- any combination of the above

It doesn't matter who develops a policy. What does matter is approval—a policy must be approved by senior decision-makers such as the Chief and Council, the housing organization's Board of Directors or a group that has approval authority. In some First Nations, the entire membership is responsible for approving general policies, including all or some types of housing policies.

Housing Managers must know how to develop, gain approval for and properly implement housing policies. Although each First Nation has its own way of developing, approving and implementing policies, there are standard steps to follow.



## Developing effective policies

A First Nation may have hundreds of different policies. Developing policies the same way for all programs and activities can be helpful. Explaining how a First Nation wants its policies to be developed is helpful to anyone asked to write a policy.

Generally, a policy about developing policy explains

- why policies are developed
- the general goals of policy development
- the general format of policies
- what information a policy should include
- who is affected and in what way by the policy
- who is responsible for initiating, developing and approving policies
- how policies will be initiated, developed and approved
- when the policy takes effect
- how policies are implemented
- how policies are modified

See Appendix 1—Policy-making policy on page 24.

If a First Nation or its housing organization does not have a policy-making policy, suggest that one be developed.

Policies should be easy to read and understand. Using a consistent format can help make policies clearer and easier to understand. Using the same format for every policy makes it easy for users, to find the information they need.

Usually, a policy contains the following information.

- Title of policy
- List of those who participated in drafting the policy
- Date of approval of the policy
- Date when the policy takes effect
- Dates of revisions to the policy
- Date when the policy ends (if required)
- Chapter title for general topic area
- Subject title for specific subject area
- General background information
  - Explanation of the purpose of the policy
  - Explanation of how the policy was developed



## PARTICIPANT'S MANUAL

- Specific policy information
  - Definitions of key terms for the policy, if required
  - Description of programs covered by the policy
  - Identification of the specific issue areas covered by the policy
  - Identification of the specific parties covered by the policy
  - Description of the specific actions required by the policy
  - Explanation of how the policy is implemented
  - Distribution list for circulating policies
  - Lists of any exceptions to the policy
- Signatures of those who approved the policy

All this information is not necessary for every policy. The information can be presented in any order and manner; however, it should be the same for similar policies.

### Step 1—Determine the need

The first step is determining the need for a policy. Policies should give decision-makers and staff, clear and consistent direction in areas that need clear and consistent direction.

Determining need begins by deciding who needs what direction. It also involves determining if a new policy is needed, or if an existing policy, with or without modification, can fill the need.

Policies must meet operational realities. Consider the following circumstances when developing policies:

- commitment of senior decision-makers (community and stakeholders) to the policy
- willingness of affected or involved parties to follow the policy
- financial capacity to implement the policy
- sufficient human resources to implement the policy
- commitment of staff to the policy

Policies fill information gaps. However, it is possible to fill those gaps with too much or even contradictory information. Determining the need for a policy requires balancing the need for information with the amount needed. It also requires ensuring that information is consistent and does not contradict other information or confuse the issue.

### Step 2—Define the policy that fits the need

Once it is determined that a policy is needed, policy-makers must define the appropriate policy. For example, a need for direction on how to allocate housing units can be filled by a policy on the allocation of housing units.

As simplistic as defining the policy on the basis of a specific need is, it is often a step that is overlooked. Clearly defining what the policy is starts with deciding what the policy should do and what it should say to whom.



These determinations can help focus the policy more clearly on specific objectives. A clear definition of an individual policy gives focus to the policy by framing its scope. An individual should be able to grasp exactly the intent of a policy by reading its title.

Every policy must conform to the overall philosophies of the First Nation, the housing organization and relevant stakeholders. Housing policies must be consistent with other First Nation and individual program policies, and conform to relevant laws, standards and stakeholder requirements.

### **Step 3—Gain approval to develop the policy**

Policies require approvals at least at two different stages.

The first approval gives policy developers the authority to go ahead developing the policy. There is no sense taking the time and effort to develop a policy if senior decision-makers do not think there is a need for that policy.

In some cases, approval is automatic when senior decision-makers direct a policy to be made.

In other situations, someone may suggest that a policy be developed. In this case, a general explanation of the policy (including why the policy is needed) should be presented to senior decision-makers for approval.

### **Step 4—Develop the policy**

The drafting of the policy can start once the general definition has been established.

Developing a policy requires various of coordinated activities.

First, responsibility for developing and approving each specific policy must be determined and assigned to the appropriate parties. They must be advised on how to develop policies according to the First Nation's general approach to policy development.

Generally, policies affect more than one party. Accordingly, it can be helpful to include affected parties—stakeholders—in developing the policy. Involving stakeholders in making a policy includes several benefits. Their participation in the process

- builds their commitment to the policy
- ensures open and transparent policy development
- allows everyone affected by the policy to provide information and express their opinions
- encourages ownership for policies
- raises awareness of people affected by the policy
- increases the knowledge base on which policies are developed

Involvement builds commitment to the end product. Involving stakeholders in policy development gives them the opportunity to help shape the policy. In turn, they are more likely to support the policy once it is developed. Even if they do not agree entirely with the policy, they at least had a chance to have their views considered.

**PARTICIPANT'S MANUAL**

Stakeholders also can provide helpful insights and valuable suggestions (including constructive criticism). Different parties see problems and solutions differently. All the different perceptions should be considered when developing policies. Involving as many stakeholders as can be managed ensures consideration of major concerns and suggestions.

However, developing policies usually takes place within a specific timeframe with limited human and financial resources. Involving stakeholders can affect the timing and cost of developing procedures. Policy developers must balance the benefits of the involvement of stakeholders against the additional time and costs their participation can create.

Usually, the most effective way to involve stakeholders in policy developing activities is to form working groups that will develop recommendations and ideas for specific policies related to their areas of interest. Those responsible for setting and approving the policy consider the working groups' recommendations.

**Step 5—Research the policy**

There usually are examples that exist of most types of housing policies. Policy developers can use the examples to review possible wording. They should gather and review examples of different wording for each policy they write.

Those reviews can save time that would be spent trying to develop new wording. Modifying wording from other policies also helps ensure the wording for the policy is workable.

In some cases, policies deal with technical or legal matters. In these cases, external consultants may be needed to develop, review or approve wording. Some policies have legal implications. In some instances, a First Nation or housing organization may have to show in court that its policy is fair and properly administered. Policies should be written so that due diligence and proper administration of the policy can be documented and verified if required.

**Step 6—Write the first draft**

Writing the first draft of a policy starts once basic content has been researched and agreed upon.

The language used should be clear, concise and consistent; words and phrases used in one policy should mean the same thing in all policies. The style and level of writing should be similar for all policies.

It is important to “say what you mean” and “mean what you say.” While all written words are subject to personal interpretation, policies should use unambiguous language that does not leave room for interpretation. Use general, direct language.

Decision-makers and staff rely on policies for direction in a wide range of circumstances that can differ greatly. They expect policies to protect them from arbitrary or unfair treatment. The wording of the policy must be clear enough to meet both those needs.

Policies must clearly say what action to follow. Individuals writing policies must stick to the point. Good policies should not allow the user or recipient to assume what the policy was intended to mean.

The content of a policy should be presented in a logical order. Policies should be structured to lead the user from one idea to the next in sequential order. This is especially important when listing actions. The policy should include everything that is important to say about the issue.



Writing a document includes reviewing, revising, reviewing again and revising again until workable language has been drafted. Do not assume that others will interpret the written document the same way as its authors intended it to be understood. Policy developers should check the language used by having various people—including staff who will implement the policy and individuals who will be affected directly by the policy—review the wording. They can offer valuable insights into the ways wording might be interpreted.

Policies must speak to the reader. They must tell the user something.

Usually, policies explain in general what to do. Procedures describe detailed activities.

Use the active voice and action verbs in the present or future tense to make policies easier to understand. Keep language in the policy simple. Use short words, short sentences and short paragraphs. Avoid jargon and slang. Use words that are commonly understood in the same way by most readers. This is especially important for First Nations, because English is a second language for some people. In some First Nations, key policies are translated into the primary language of the community, including syllabics as appropriate.

When a policy includes legal implications, someone with legal training should review the wording.

Policies must not include racist, sexist or otherwise discriminatory language. Offensive language in a policy weakens the policy.

Finally, ensure that policies are grammatically correct. Policies that include grammatical errors or spelling mistakes don't inspire confidence in the people who implement them or the people they affect. Proofread every policy and correct errors before presenting it to others.

### **Step 7—Review and revise first draft**

Some policies deal with simple situations and give limited detail. Other policies involve complex issues that require substantial detail. In either case, various parties, including stakeholders, should again review the drafts to ensure they are interpreted the way they were intended. This review can identify areas where wording is ambiguous or confusing.

It may take several reviews and revisions before the policy is ready for approval and implementation.

### **Step 8—Approve the policy**

Policies give direction and tell people what they can and cannot do in specific situations. That means senior decision-makers must approve them.

Each First Nation has its own way of approving a policy. In most cases, the Chief and Council will be involved, either directly or through the councillor who holds the Housing Portfolio.

If there is a housing organization, it will also review and approve policies. In some cases, its approval will be final. In other cases, it will approve the policy for recommendation to the Chief and Council, who give final approval.

Policies with major impacts may go to the First Nation membership for approval. Usually, that approval is through a membership meeting. In some First Nations, the whole membership must approve the entire housing policy package.

However a First Nation approves policies, it is important to have a consistent approval system and to



document the approval process. Generally, policies require some form of formal approval by the approving authority. Policies are not official until the approving authority says so.

Housing Managers usually oversee the approval process for policies. Accordingly, they must know how that process works. They should be prepared to explain new or revised policies to decision-makers and answer their questions related to the policies.

Quite often, draft policies must undergo some revisions before decision-makers will approve them. Housing Managers may be asked to manage the process of making changes and resubmitting the revised policy for approval. In some cases, decision-makers may ask for more than one series of revisions before they approve a policy.

### **Step 9—Implement the policy**

A policy can be implemented once it is approved. Putting a policy in place is more than just copying it and putting it in the policy manual. Policies are most useful if they are known to, available to and used by staff and persons to whom the policies apply.

The staff who will implement policies should review them. It is good practice to meet personally with staff to review new policies. Policies should be explained in clear terms at those meetings. Staff should be encouraged to ask questions about the policies. They also should be encouraged to express any concerns they have about the policy and implementing it. Finally, they should be told to tell their manager if they have problems applying the policy.

To ensure that staff understand a policy, ask them to explain it to the group in their own words. If they can do it in a way that accurately reflects the intent of the policy, they probably have a good understanding of it. Doing this in a group can bring out perspectives that will broaden everyone's understanding.

Policies should be distributed to stakeholders and to people to whom they apply. They should be encouraged to ask any questions they may have about the policy. Answer the questions clearly and completely.

If several policies are being implemented at the same time, it may be helpful to produce general explanations of the entire package and question-and-answer materials for specific policies.

The implementation of policies involving tenants and users of facilities can include special meetings to present, discuss and answer questions. The same approach can be used for policies involving housing organization directors, staff and potential bidders on housing projects, programs and activities.

Circulate general policies among the people who are impacted. Put the policies up on community posters. Be sure to tell people how they can find out more about the policies.

Housing Managers do most of this work. Usually, it is fairly simple. For controversial or complex policies, Housing Managers must try to anticipate questions or concerns and be prepared to answer them. In both situations, Housing Managers must take the time to fully understand the policies so they can explain them.

Policies must be applied consistently and fairly. If they are not, people will lose faith in them. Over time it will become impossible to enforce them. Applying policies differently is worse than having no policies at all.



It can be difficult to apply policies consistently. This is especially true for policies that can benefit some people. For example, policies for selecting tenants can result in some people receiving housing units, while others do not. If senior decision-makers ignore policies, the policies mean nothing.

If tenants ignore rent payment policies and nothing is done to enforce the policy, eventually very few tenants will pay rent. Or, if senior decision-makers tell a Housing Manager not to collect from specific individuals, over time, other tenants will refuse to pay rent.

Housing Managers can be in a difficult position if they are required to enforce policies but can't because of user resistance or interference by senior decision-makers. When that happens, the Housing Manager should explain the situation to the housing organization's Board of Directors and ask it to either amend the policy or enforce it. If there is no housing organization, the Housing Manager should advise the councillor who holds the housing portfolio.

In either situation, the Housing Manager should clearly explain the importance of enforcing policies and the consequences of not enforcing them.

### **Step 10—Monitor policy implementation**

It is sometimes difficult to implement even the most carefully planned and professionally prepared policy. Wording problems may not show up until the policy is tested under actual circumstances. Situations that the policy was designed to address may have changed while the policy was developed and it is no longer relevant. Unanticipated situations may have arisen that the policy does not address. Resistance to controversial policies may be stronger than expected and the policy can't be enforced in its original form.

All of these—and other problems—can prevent effective implementation of a policy. Accordingly, policies must be monitored throughout their lifetime but most importantly when they are first put in place. This is the time when most implementation problems will appear. Catching and correcting problems as they surface makes implementing policies much easier over the longer term.

### **Step 11—Revise or cancel the policy as required**

Policies are living documents. They must change to remain relevant and to respond to changing circumstances. Monitoring policy implementation can indicate if there is a need to revise or cancel a policy.

Revising a policy follows much the same process as developing a policy.

- The need (reasons) for the revision must be identified.
- The specific revisions must be defined.
- Senior decision-makers must agree with the need to change the policy.
- Research on how to change the policy should identify approaches and possible wording for the changes.
- Appropriate wording for the changes must be developed in consultation with stakeholders and others.
- The revised wording must be prepared in a professional manner.
- The revised policy must be approved by appropriate decision-makers.



**PARTICIPANT'S MANUAL**

- The revised policy must be implemented and explained to involved and affected parties.
- The application and enforcement of the revised policy must be monitored.
- Over time, the revised policy also must be revised or cancelled as required.

Cancelling a policy is simpler, but many similar steps must be followed.

- The reason for cancelling the policy must be identified.
- The results of cancelling the policy must be defined.
- The need to cancel the policy must be reviewed with senior decision-makers and stakeholders.
- Cancelling must be approved by the appropriate senior decision-makers.
- Cancellation must be explained to involved and affected parties.
- The impact of cancellation must be monitored.
- Any problems created by the cancellation must be corrected.

Formal procedures for revising or cancelling policies are part of the process for making housing policies.

**Making policies for the right reasons in the right way**

Without policies, Housing Managers and other decision-makers must decide on every issue by responding to its specific circumstances. Without policies, every decision is a new decision. Without policies, it is more difficult to treat people fairly and consistently.

Making and revising policies the right way requires proper planning, formal procedures and a disciplined approach. Housing Managers must help develop and enforce many of those policies. Knowing how to manage the development and implementation of housing policies is an essential skill for all Housing Managers.

The process outlined in this Manual is useful most of the time in most situations. However, Housing Managers must be able to modify the process to meet the needs of their First Nation.

***Exercise 5—Developing an action plan for developing policies***

In this exercise, you develop an outline of an action plan for developing or improving housing-related policies for your First Nation. Be prepared to discuss your plan with the other participants.



## Chapter Two—Developing and writing procedures

### Overview

This Chapter reviews the key steps in developing, writing and using procedures for housing projects, programs and related activities.

At the end of this Chapter, you will be able to

- describe the general purposes of written procedures
- describe how procedures help decision-makers and staff manage housing projects, programs and related activities
- explain how to prepare procedures for housing projects, programs and related activities for your own First Nation.

Policies can stand alone, but they are much more effective when supported by formal, documented procedures. Procedures provide general directions on carrying out an activity in a logical order to accomplish a specific goal. Generally, procedures are based on formal policies.

Procedures are outlined in written documents to provide consistent direction to individuals carrying out policy-driven activities.

Usually, procedures are developed jointly by senior staff and operational staff. The First Nation Chief and Council and the housing organization's board of directors usually are not directly involved in developing procedures. However, when a procedure applies to a potentially controversial issue (such as selecting tenants for housing units or collecting new types of rent), the Chief and Council and board of directors may ask for briefings on procedures and give them final approval.

Making them easy to use is the key to writing effective procedures. There are a number of general techniques that are useful in most instances. Each First Nation should customize these techniques to meet its own specific circumstances.

It is a general practice to document procedures using a standard format. Organizing information using a consistent format makes it easier to find the same types of information for different procedures.

Senior staff, in close consultation with operational staff, develop procedures.

### Putting policies to work through proper procedures

Procedures must support policies. Because procedures outline the general ways of ensuring policies are followed, they cannot exist without a policy.

Operational staff use procedures for ongoing or repetitive activities that must be done the same way every time.

Decision-makers and managers use procedures to ensure that staff are carrying out specific activities consistently and effectively.

Procedures benefit program clients, such as housing tenants, because they explain to them exactly how they can expect to be dealt with by staff.

**PARTICIPANT'S MANUAL**

Each First Nation should develop and implement a formal, documented process for developing, monitoring and revising procedures. The process should include directions on

- determining when written procedures are required
- assigning responsibilities for developing, amending and cancelling procedures
- formatting procedures
- approving different types of procedures at various levels
- communicating procedures to the right people at the right time
- monitoring the implementation
- evaluating the effectiveness and results of procedures
- revising or cancelling procedures as required

**A procedure for writing procedures**

Procedures should be drafted using a standard format with consistent presentation of information. Above all, they should be easy to use.

- Use consistent types of forms to describe procedures.
- Use active voice and action verbs to describe steps.
- Use the same sentence structure for each step.
- Divide longer procedures into logical groupings such as chapters or sections.
- Use consistent types of headings for chapters and sections.
- Use the same words for all related procedures.
- Ensure all the information in the procedure is accurate, complete and up-to-date.
- Identify written procedures by name and number.
- Say what policy the procedure applies to.
- List each specific activity required to complete a procedure as a separate step.
- Present procedural steps sequentially in the order in which they should happen.
- Use numbered, bulleted or point-form lists for steps.
- Identify responsible persons or organizations for each step.
- Include for each step what should be done, where, when and by whom.
- Identify appropriate means of communication and reporting for specific activities where required.
- Identify contingency plans for handling problems for each procedure.
- Use graphic representations of processes (such as flow charts) to reinforce steps and activities as appropriate.



- Identify any limitations on discretion.
- Include any required warnings, cautions or explanatory notes.
- Test the procedure by having someone complete a task using the procedure.

Procedures are often graphically displayed using the following tools to break them into activities with manageable and measurable tasks or steps.

- organization charts
- flow charts
- numbered lists
- forms
- checklists

A basic test of any procedure is to answer the following questions:

- Does the procedure support the intent of relevant policies?
- Does the procedure work in real life?
- Is staff comfortable using the procedure?
- Do clients accept the procedure?
- Does the procedure result in activities taking place in the same way?
- Is the procedure as simple and efficient as possible?

Procedures, like policies, have to be revised or cancelled. Just as there is a process for preparing procedures, there should be a formal process for revising them. Housing Managers should monitor procedures to ensure that they are relevant and up-to-date.

### **Putting it all together in one big package**

Policies and procedures should be documented and consolidated into manuals for use by different people. Each type of document should be cross-referenced to other types of documents dealing with the same topic.

Manuals should include a detailed table of contents so all users can quickly locate the information they want. They should be available to interested parties and updated as required.

### ***Exercise 6—Writing a procedure***

In this exercise, you write a procedure for a tenant for selection policy. Be prepared to review your procedure within a group discussion.



## Chapter Three—Putting policies and procedures to good use

### Overview

This Chapter reviews how to put to use in your community what you have learned during this workshop.

At the end of this Chapter, you will be able to

- identify how you can use what you have learned in this workshop to develop and implement policies and procedures for your First Nation's housing projects, programs and related activities.

Each First Nation must develop and implement policies and procedures appropriate to its circumstances. Housing Managers must provide guidance on how to develop policies and procedures for housing projects, programs and related activities. In most cases, Housing Managers either write or manage the writing of those policies and procedures.

You should consider how you can ensure your First Nation has appropriate policies and procedures. Every First Nation is different, so you must take what you have learned during this workshop and modify it to meet your own circumstances.

Policies and procedures for various programs for each First Nation should be as similar as possible.

In some cases, a First Nation will already have a process for developing policies and procedures, and a full set of policies and procedures. In other cases, the process or the actual policies and procedures may require some work. Some First Nations may have policies and procedures for some programs, but not for others.

You must work with what you have in your own First Nation. Hopefully you can put to use what you have learned during this workshop to help develop and implement housing-related policies and procedures that serve as model for the entire First Nation. Or, you can adopt processes for developing and formatting policies and procedures from other programs that have already developed high-quality models.

Developing high-quality policies and procedures is only the start. The real test of developing workable policies and procedures is to make them work as intended. Housing Managers generally have responsibility for implementing housing-related policies and procedures. You must ensure that policies and procedures are fairly and consistently applied. You must ensure that those materials are updated and revised as needed.

You can do many different things to build upon what you have learned from this workshop. The key is to make certain that you use what you have learned as soon as possible to reinforce theory with hands-on experiences. You can start that process as part of this workshop by completing the following exercise.

### Exercise 7—Taking it all back home

In this exercise, you prepare a list of what you will do to build upon what you have learned during this Workshop. Be prepared to discuss your list with the other participants.



## Appendix I—Policy-making policy

All Nations First Nation Housing Authority

**Title:** Policy on Policy Making

**Policy:** 2003-01

**Date:** December 1, 2003

**Purpose:** The purpose of the All Nations First Nation Policy on Policy-Making is to establish a process for developing policies and to ensure that policies are developed, written and approved in an accountable and consistent manner. Policies will support the mission, vision, values and goals of the All Nation First Nation.

### Definitions

Policy

Procedure

### Responsibilities

#### Chief and Council

Request new policies to be developed

Review existing policies as required

Request modifications of existing policies

Recommend changes to draft policies

Approve policies

Ensure policies are followed

#### Housing Authority Board of Directors

Request new policies to be developed

Review existing policies as required

Request modifications of existing policies

Recommend changes to draft policies

Approve policies for consideration by Chief and Council

Ensure policies are followed

#### Housing Manager

Request new policies to be developed

Review existing policies as required

Request modifications of existing policies

Recommend changes to draft policies

Prepare policy reviews for Board of Directors

Review policies with Board of Directors

Ensure policies are followed



### **Housing Authority Staff and Volunteers**

- Request new policies to be developed
- Review existing policies as required
- Request modifications of existing policies
- Recommend changes to draft policies
- Ensure policies are followed

### **Tenants**

- Request new policies to be developed
- Review existing policies as required
- Request modifications of existing policies
- Recommend changes to draft policies
- Ensure policies are followed

### **Policy Requirements**

- Policies must conform to legislation, regulations and bylaws.
- Policies must conform to First Nation's policy format and process
- Policies must be presented to the Board of Directors.
- As required, policies must be approved by the Chief and Council
- Policies must be approved in the proper format.

### **Sample policy for review**

Name of Policy:	AFNA Housing Authority Policy on Policy-Making
Date of Policy Approval:	December 15, 2003
Policy Approved by:	AFNA Housing Authority and Chief and Council
Policy Revised:	April 1, 2005
Revisions Approved by:	AFNA Housing Authority

### **Purpose of Policy**

Policy-making is the way the All Nations First Nation Housing Authority Board develops frameworks for decision-making and sets general guidelines for its operations. Policies are used by the All Nations First Nation Housing Authority's Board, staff and volunteers for making decisions on governance issues and implementing day-to-day operations.



## **Key provisions of policy**

Policies must be consistent with, and support, the overall principles, goals and objectives of the All Nations First Nation.

Policies should address key issues affecting the housing of members of the All Nations First Nation and the operations of the All Nations First Nation Housing Authority.

Policies should explain how the All Nations First Nation Housing Authority communicates its mandate, goals, structure and operational activities to the All Nations First Nation leadership, Housing Authority staff and volunteers, First Nation Members, stakeholders and others interested or involved or affected by the operations of the All Nations First Nation Housing Authority.

Policies must be consistent with the Housing Authority Mission Statement, Vision Statement, Values Statement, mandate, goals and objectives.

Policies must be written in clear consistent language.

Policies are public documents that must be easily accessible to the above parties.

Policies must be supported through documented goals, objectives, procedures and practices.

## **Policy procedures**

Policies will be initiated by

- the All Nations First Nation Chief and Council
- the All Nations First Nation Housing Authority Board of Directors
- recommendations from All Nations First Nation members
- recommendations from All Nations First Nation Housing Authority staff, volunteers and clients
- recommendations from All Nations First Nation Housing Authority stakeholders
- recommendations from All Nations First Nation advisers

The All Nations First Nation Housing Authority Board of Directors oversees the development of all housing policies.

Unless otherwise waived by the Board, all policies must be presented to and reviewed by the Board at two different meetings as part of the Board approval process.

General housing policies must be approved by a consensus of the Housing Authority Board of Directors.

The formal recommendation for the approval of a policy by the All Nations First Nation Chief and Council shall be in the form of a motion of the Board and recorded in the minutes of the meeting of the Board at which that motion is passed.

The All Nations First Nation Housing Authority Board of Directors will recommend all housing policies to the All Nations First Nation Chief and Council.

The All Nations First Nation Chief and Council will be responsible for approving all Housing Authority policies.





All policies should include

- a reason for the policy (the purpose)
- a concise explanation of the goals of the policy
- details on the guidelines that may be included in the policy
- details on to whom the policy applies
- the effective date of the policy
- the effective date of revision
- a termination date for the policy as needed

Housing policies will be developed with appropriate input from involved parties, affected individuals and stakeholders through formal and informal consultations as required.

All policies are subject to a regular review with a minimum of an annual review for each policy.

Appropriate legal advisors must review all policies requiring legal interpretation.

All housing policies requiring approval of the All Nations First Nation Chief and Council must be approved through a Band Council Resolution.

All Nations First Nation Housing Authority staff will use the policies to develop procedures and practices. All procedures and practices must be consistent with the Housing Authority policies and the operations of the All Nations First Nation Housing Authority.

Policies will be written, clearly defined and guided by the Housing Authority mission statement, mandate, goals and objectives.

Policies are public documents that should be easily accessible to the above parties.

Policies must be supported through documented goals, objectives, procedures and practices.

Policies will be initiated by

- the All Nations First Nation Chief and Council
- the All Nations First Nation Housing Authority Board of Directors
- recommendations from All Nations First Nation members
- recommendations from All Nations First Nation Housing Authority staff, volunteers and clients
- recommendations from All Nations First Nation Housing Authority stakeholders
- recommendations from All Nations First Nation advisers

The All Nations First Nation Housing Authority Board of Directors will oversee the development of all housing policies.

Unless otherwise waived by the Board, all policies must be presented to and reviewed by the Board at two different meetings, as part of the Board approval process.

General housing policies must be approved by consensus of the Housing Authority Board of Directors.



The formal recommendation for the approval of a policy by the All Nations First Nation Chief and Council shall be in the form of a motion of the Board and recorded in the minutes of the meeting of the Board at which that motion is passed.

The All Nations First Nation Housing Authority Board of Directors will recommend all housing policies to the All Nations First Nation Chief and Council.

The All Nations First Nation Chief and Council will be responsible for approving all Housing Authority policies.

All policies should include

- a reason for the policy
- a concise explanation of the goals of the policy
- details on the guidelines included as part of the policy
- details on to whom the policy applies
- the effective date of the policy
- the effective date of revision
- a termination date for the policy as needed

Housing policies shall be developed with appropriate input from involved parties, affected individuals and stakeholders through formal and informal consultations as required.

All policies are subject to a regular review of the individual policies with a minimum of an annual review.

Appropriate legal advisors should review all policies requiring legal interpretation.

All housing policies requiring approval of the All Nations First Nation Chief and Council should be approved through a Band Council Resolution.



First Nations Housing Manager Training Program

## **DEVELOPING EFFECTIVE POLICIES**



**PARTICIPANT'S WORKBOOK**

**PARTICIPANT'S WORKBOOK****TABLE OF CONTENTS**

Exercise 1—Participant Introductions . . . . .	3
Exercise 2—Participant Expectations . . . . .	4
Exercise 3—Review of Existing Policies . . . . .	5
Exercise 4—Developing a Housing Allocation and Tenant Selection Policy. . . . .	6
Exercise 5—Elaborating an Action Plan for Developing Policies . . . . .	8
Exercise 6—Writing a Procedure . . . . .	9
Exercise 7—Taking it all Back Home . . . . .	10
Exercise 8—Workshop Evaluation—Developing Effective Policies . . . . .	11





**Exercise 1—Participant Introductions**

In this exercise, you introduce yourself to the other Workshop participants and tell them something about yourself. The other participants will do the same thing.

There are many ways for members of a group to introduce themselves to each other. Your facilitator will give you directions about the introduction activity for this Workshop.

Use the space below for notes about the other participants.

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---



**Exercise 2—Participant Expectations**

In this exercise, you set out your expectations for this Workshop.

In the space below, list what you hope to achieve or learn in this Workshop. Once you have listed your expectations, we will share them with the group. Your facilitator will write them on the flip chart and post them in the classroom so that we can refer to them throughout the course.

To list your expectations, answer the following question:

“This was a great Workshop because I learned . . .”

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---



**PARTICIPANT'S WORKBOOK****Exercise 3—Review of Existing Policies**

Most First Nations have their own set of housing policies. Use the following space to list areas covered by housing policies for your First Nation. Identify each policy area in point form.

Use the space on the following pages to list areas covered by policies for other First Nations. Identify any common themes.

Review the list of all policy areas to determine if there are policy areas that you think should be added to your own First Nation's housing policies.

Be prepared to discuss your list with other participants in a group discussion.

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

### Exercise 4—Developing a Housing Allocation and Tenant Selection Policy

The All Nations First Nations Housing Authority is responsible for allocating all CMHC-subsidized and First Nation housing units to First Nation members. In a typical year, the Housing Authority will build or renovate five to ten units that can be allocated to individuals and families.

Currently, the Housing Authority allocates houses on the basis of need, with the three primary goals of:

1. moving members out of unsafe or unhealthy housing units
2. moving members out of substandard housing units that may not be safety or health risks, but are below other standards, such as poor quality construction, damaged units, difficult-to-heat units, difficult to maintain or lacking proper water and sewer services
3. reducing overcrowding

The Housing Authority has a list of members requiring new housing. That list includes members who have priority for new or renovated housing units and those who live in suitable housing (in line with Housing Authority standards) but have asked for new houses for other reasons such as:

- wanting a newer house
- wanting a larger house
- being dissatisfied with current house
- wanting to move closer to relatives
- wanting to move to different location
- moving back to the community for personal reasons
- moving back to the community to work
- moving relatives back to the community

It also includes younger family members who want their own houses, and couples getting married or living in common-law who want their own houses;

The Housing Authority assigns housing to individuals when it approves new housing units. It bases its recommendations on its list of priority needs and understanding of the current circumstances for members requiring housing. Generally, the Board asks the Housing Manager to update the priority list and the situation for individuals requiring housing.

The way the Housing Authority selects members for housing units has been the same for the past 10 years. The Housing Authority has never put its selection process in writing. Discussions about allocating housing units are held *in camera* (that is, in private). The Housing Authority Board does not record the reasons for its choices. The Housing Authority Board gives the Chief and Council its selections in a single list and recommends that the Chief and Council approve the list.

Since the members of the All Nations First Nation know that the Chief and Council are responsible for the final approval of the allocation of housing units, some individuals lobby the Chief or Councillors—sometimes aggressively—for housing units for themselves. In some cases, members of the Chief and Councillors' families lobby their relatives directly.

**PARTICIPANT'S WORKBOOK**

Often, members who asked for but did not get housing will ask questions at First Nation membership meetings and Chief and Council meetings.

In the last three elections for Chief and Council the allocation of housing units has been a major issue.

Some candidates for Chief and Council promise housing units to individuals during election campaigns.

The Chief and Council usually take names off and put others on the Housing Authority Board list. The additions are usually not people whose need for new housing meets the First Nation's three priorities.

Many First Nation members complain that the allocation of housing units is unfair and the Chief and Council interfere by directing the Housing Authority to allocate housing units to certain members.

Use the following pages to explain how you think the All Nations First Nation Housing Authority should develop a *Housing Unit Allocation and Tenant Selection Policy*.

Explain—in point form—what actions you would take for each of the 11 steps for making policies listed in the *Developing Effective Policies Participant's Manual*.

Use the *Developing Effective Policies Participant's Manual* as a guide and framework for the policy.

Be prepared to discuss your list with other participants in a group discussion.

Step 1—Determine the need

Step 2—Define the policy that fits the need

Step 3—Gain approval to develop the policy

Step 4—Develop the policy

Step 5—Research the policy

Step 6—Write the first draft

Step 7—Review and revise the first draft

Step 8—Approve the policy

Step 9—Implement the policy

Step 10—Monitor the policy implementation

Step 11—Revise or rescind the policy as required

### Exercise 5— Elaborating an Action Plan for Developing Policies

Each First Nation should have its own process for developing housing policies. Your First Nation may already have a formal process in place. Or it may develop policies on an “as needed” basis—making policy when the need arises.

Use the space below to list what you are going to do in your own community to develop a comprehensive set of housing policies for your First Nation.

List each step in point form. Those steps should provide a foundation for an action plan for developing housing policies that you and others can use for your own housing program. Identify who needs to do what, at what time, for each action.

Action	Who does it	When



**PARTICIPANT'S WORKBOOK**

**Exercise 6—Writing a Procedure**

Use the information you prepared for “Exercise 4—Developing a housing allocation and tenant selection policy” and write a procedure to put the policy into effect.

Use the space below and on the following pages to outline—in point form—the specific actions to put the policy into effect.

Be prepared to discuss your procedures with other participants in a group discussion.

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---



**Exercise 7—Taking it all Back Home**

This Workshop is only successful if you use what you have learned to develop effective policies for your First Nation.

Think about what you need to do on a priority basis to develop or improve housing policies for your First Nation.

Use the space below and on the following pages to list 10 specific actions you will take following this workshop to improve housing policies for your First Nation.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_
10. \_\_\_\_\_



## PARTICIPANT'S WORKBOOK

### Exercise 8—Workshop Evaluation—Developing Effective Policies

The purpose of this exercise is to evaluate this Workshop. You will be asked what you liked most and what you liked least and to give your impression of the materials and the facilitator.

Complete the evaluation form on the following pages and hand it in to the facilitator before you leave.

#### Workshop evaluation

1. List the three things you liked best about this Workshop.

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

2. List the three things you liked least about this Workshop.

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

3. How would you rate the *Participant's Manual* and *Workbook* for the Workshop?

	Very useful	Satisfactory	Not very useful
Usefulness	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Completeness	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Relevance to your own job	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments \_\_\_\_\_

\_\_\_\_\_

4. Do you think you will use the materials for reference after the Workshop?  Yes  No



5. How would you rate the facilitator for this Workshop?

	Excellent	Very good	Good	Fair	Poor
Knowledge of subject	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Style of presentation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ease of understanding	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Relevance of presentations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments \_\_\_\_\_  
\_\_\_\_\_

6. How would you rate your own participation in this Workshop?

	Excellent	Very good	Good	Fair	Poor
Attendance at Workshop	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reading of materials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Participation in discussions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Completion of exercises	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Understanding of material	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments \_\_\_\_\_  
\_\_\_\_\_

7. What do you think could be done to improve this Workshop?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_





**PARTICIPANT'S WORKBOOK**

8. How would you rate the length of this Workshop?

**Too long**      **Just right**      **Too short**

Comments \_\_\_\_\_

\_\_\_\_\_

9. Would you recommend this Workshop to others?     Yes     No

Why? \_\_\_\_\_

\_\_\_\_\_

10. Are you interested in taking other Workshops in the First Nation Housing Manager Training Program?

Yes     No

11. If you are interested in taking other Workshops in the First Nation Housing Manager Training Program, what subjects interest you the most?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

12. General comments about the Workshop.

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



**Notes**

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---