



# Property & Home Maintenance Management





# Welcome and Introductions


- Your name
- Your community
- Your role in housing
- Your biggest challenge in maintenance



# Workshop Objectives


To help participants re-focus on the importance and benefits of property and home maintenance management and to help ensure that policies are in place which share the responsibilities of home maintenance.

Participants will be given the opportunity (as a team) to develop a three-year *Property and Home Maintenance Management Plan* through a case study; and then to work on a five-year plan for their own community.



# Agenda – Day 1

- Welcome and Introductions
- Overview of Housing Maintenance
- Determining the Priority of Maintenance Work
- Strategies for Doing More with Limited Budgets
- Beware of Program Restrictions!
- Team Exercise on Maintenance Planning
- Debriefing of Day 1



## Agenda – Day 2

- Presentations/Discussion of Planning Exercise
- Sources of Funding for Home Maintenance and Repairs
- Home Maintenance – A Shared Responsibility?
- Developing YOUR Maintenance Management Plan
- Workshop Debriefing and Lessons Learned
- Workshop Evaluations



# Overview of Housing Maintenance

- What is housing maintenance (and maintenance management)?
- What are 3 types or levels of maintenance?
- Why is home maintenance so important?
- What are the benefits of home maintenance?
  - to the occupants?
  - to the community?



# Property & Home Maintenance

- How would you define Property and Home Maintenance?

The work required to keep a house (and surrounding property) in good condition; in a state of good repair.

Therefore, Property & Home Maintenance **Management** is managing the work performed (by occupants, staff and/or contractors) to keep your community's housing projects in good condition.



## Group Discussion

- What are some activities involved in property management?

(Discuss in small groups and prepare list)





# Managing Property & Home Maintenance

## Activities of Property & Home Maintenance

- Outlining responsibilities of tenants and landlords through housing policy and tenancy agreements
- Managing day-to-day maintenance and upkeep
- Addressing health and safety issues, fire safety
- Regular inspection of units
- Dealing with emergency repairs
- Performing move-in and move-out inspections
- Tendering and contracting of repair work
- Building codes and by-laws



# Types of Housing Maintenance

## What are three types or levels of home maintenance?

### 1. Routine Maintenance

- Day to day repairs, ex. replacing tap washers, tightening screws and door or cupboard handles
- Seasonal tasks, ex. replacing furnace filters, cleaning Heat Recovery Ventilators, cleaning out eaves-troughs, etc.
- Emergency repairs, ex. repairing broken windows

### 2. Preventive Maintenance

- Planned repair or replacement to avoid breakdown, ex. chimney cleaning, changing furnace filters

### 3. Replacement of Major Components

- Replacement of items that have reached their useful life, ex. replacing roofs or heating systems



# Importance and Benefits

## **The Importance and Benefits of Property and Home Maintenance**

- Why is maintaining community housing so important?
- What are the benefits:
  - to the occupants?
  - to the community?



# Importance of Maintenance

## **Importance of Property and Home Maintenance (and Planning):**

- Ensures the health and safety of the tenants  
(also liability issue)
- Prevents more serious and expensive collateral damage
- Protects the community's substantial investment
- Ensures sustainability of your community's housing program
- Meets the requirements of CMHC Section 95  
Operating Agreements



# Benefits

## **Benefits of good maintenance:**

- Safer, healthier housing
- Houses look better and last longer
- Increased pride and satisfaction
- Frees up time and money for more important repairs



# Is the Repair Request a Priority?

**How can you assess whether a repair is urgent, or a priority?**

- Know the condition of ALL your housing units
- Have a Maintenance Plan to address ALL repair needs
- Assign a priority level to work-requests and initiate work-orders
- Carry out preventative maintenance to reduce emergencies
- Handle emergencies



# Emergencies

## **A repair request is an emergency when...**

- The health or safety of the occupant(s) is threatened
- The structural integrity of the unit is threatened, or
- Ignoring the request could result in expensive collateral damage



# Funding Restrictions

## **Be Aware of Funding Restrictions for Different Programs**

- Residential Rehabilitation Assistance Program (RRAP)
  - On-Reserve
- RRAP – For Persons with Disabilities
- Section 95 Replacement Reserves
- AANDC Funding





# “Strategic” Approach to Maintenance

Try to get more funds but if you can't, you need strategies for doing more with less, including:

- tendering supply and service contracts
- benefiting from “economies-of-scale”
- standardization of fixtures/equipment/appliances
- doing preventative maintenance
- performing “responsible postponement”
- requiring tenants to perform basic home maintenance tasks



# Maintenance Planning

## **What is maintenance planning?**

Maintenance planning is the plan you will follow to manage the state of your community's housing portfolio and maximize the lifespan of all houses.

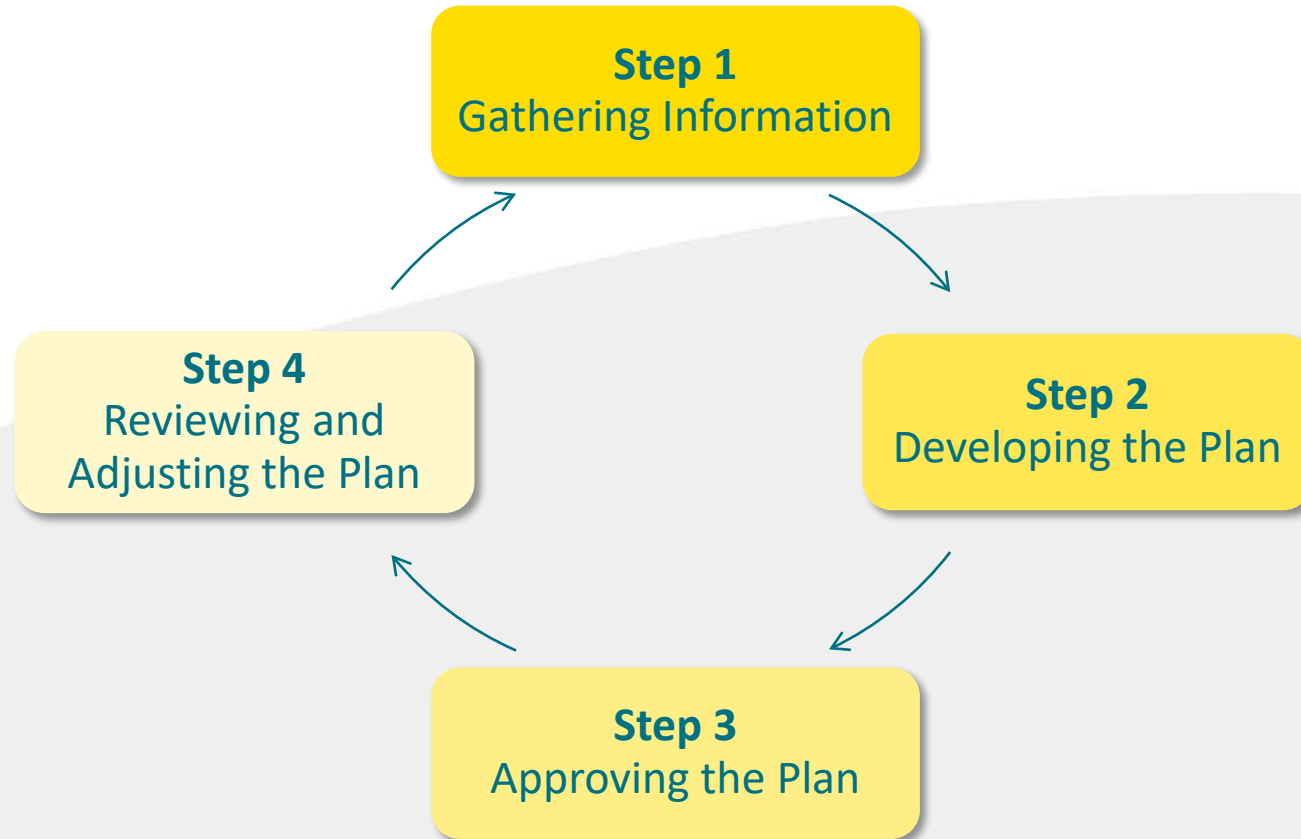


# Maintenance Planning

**If you were repairing your own house over the next three years, what information would you need?**

- What?
- When?
- Who?
- How much?

# The Four-Step Planning Model:





# Team Exercise – Maintenance Plan

In teams, you will:


- Review information
- Consider “strategies”
- Formulate 3-year maintenance plan
- Present to class of:
  - ... priorities determined;
  - ... “strategies” used to get more done;
  - ... highlights of 3-year year plan spending.



# Debriefing of Day 1

## What did you find most useful?

- Importance of Home Maintenance;
- Assessing the condition of community housing;
- Determining the urgency of maintenance work;
- Maintenance strategies with limited budgets;
- Funding Restrictions;
- The Maintenance Planning Exercise.



## Agenda – Day 2

- Presentations/Discussion of Planning Exercise
- Funding Sources
- Maintenance – A Shared Responsibility?
- Implementing Change in Your Community
- Developing YOUR Maintenance Management Plan
- Workshop Debriefing and Lessons Learned
- Workshop Evaluations



# Funding Sources

## **What sources of funding are available for your community's housing maintenance and repairs needs?**

- CMHC (Replacement Reserves, RRAP, HASI)
- AANDC (Capital Funding Allocations)
- First Nations Market Housing Fund
- Financial Institutions (Housing loans)
- Tenants (Rent or housing charge)
- Other (NRCan, Provincial Hydro agency, rebates/incentives)





# A Shared Responsibility

## Housing Maintenance – A Shared Responsibility?

- What are some benefits of assigning tenants a role in maintaining their home?
- What sort of tasks could they be assigned?
- Should tenure effect a home occupant's responsibilities? (homeownership units; rent-to-own units; rental housing units; seniors housing units)



# Basic Home Maintenance

## **Benefits of occupant performing basic home maintenance:**

- More timely repairs
- Frees up time and money for more serious repairs
- Builds useful skills on the part of the occupant(s)
- Results in greater pride and satisfaction



# Tenant Home Maintenance

## **What are some things tenants could be responsible for?**

1. Regular maintenance items?
2. Preventative items?
3. Replacement items?

(List basic maintenance or repairs which tenants should perform)



# Tenant Home Maintenance

## What are some things tenants could be responsible for?

1. Regular maintenance items ? **Some**  
Replacing tap washers; tightening screws in hinges, door-knobs and handles; refastening loose interior trim or electrical cover plates; replacing weather-stripping; painting interior walls and window/door trim; replacing caulking around the bath-tub; maintaining the property in tidy condition...
2. Preventative items ? **Some**  
Cleaning air intake and exhaust hoods and screens; cleaning or changing filters on furnace and HRV; painting exteriors steps and landings, wood trim; replacing caulking around exterior windows and doors...
3. Replacement items? **No**



# Housing Policy

## Your Decisions .... Housing Policy

- Why is it importance to have a clear, up-to-date Housing Policy and By-Laws in place for managing your housing portfolio?
- How can their existence or non-existence affect the decisions you make in managing housing?



# Implementing Change

## How can you implement change in your community?

- Identify the issue and options to resolve the problem;
- Consult with the affected parties (Chief and Council, Housing Committee, membership)
- Define the solution supported by majority and revise Housing Policy and By-Laws, as applicable.
- Obtain approval of the revised Housing Policy, etc.
- Implement the change through revised tenant agreements and client counseling.



# Overview of Community Planning (Housing)

**FIRST NATION  
Community Goals / Vision**

**Employment**

**Housing**

**Forestry**

**Housing Policy & Bylaws**

**Funding Agreements**

**Rental / Tenant Agreements**

**Property & Home Maintenance  
Management Plan**



# Occupant's Role and Tools to Help

## **Occupants/Tenants can Share the Responsibility**

- Contribute funds for maintenance & repairs  
(Rent or Housing Charge)
- Perform Basic Home Maintenance

## **Tools:**

- Counsel occupants/tenants on maintenance responsibility
- Provide list of basic maintenance tasks to be done
- Show how to do it at time of move-in
- Provide Basic Home Maintenance Workshop
- Provide reminders of seasonal tasks
- Do follow-up visits to ensure maintenance is done





# Developing “Your” Property & Home Maintenance Plan

Community Housing Teams work on development of 3-year plans by:

- Review information
  - What is your annual repair and maintenance budget?
  - Do you have a replacement reserve for this phase?
  - What work needs to be done on this phase?
  - How much will the needed work cost?
  - What are the priorities for the first year; second year and third year?
- Consider “strategies”
- Develop your 3-year Property & Home Maintenance Plan



# Debriefing Day 2

## Lessons Learned?

- What did you learn that you can apply back in your community?
- What obstacles or challenges may you face?
- How could you overcome those obstacles?
- What help may you need?
- Did you enjoy this workshop?

Please complete and leave your Evaluation Forms.

Thank you!

Thank you

