

# Property & Home Maintenance Management



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Property & Home Maintenance Management - **PARTICIPANT MANUAL**

First  
Nations

68033





# Property & Home Maintenance Management



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## CMHC — YOUR PARTNER IN HOUSING

Canada Mortgage and Housing Corporation (CMHC) has been Canada's national housing agency for more than 65 years.

Together with other housing stakeholders, we help ensure that the Canadian housing system remains one of the best in the world. We are committed to helping Canadians access a wide choice of quality, environmentally sustainable and affordable housing solutions that will continue to create vibrant and healthy communities and cities across the country.

For more information, visit our website at **[www.cmhc.ca](http://www.cmhc.ca)** or follow us on **Twitter, YouTube** and **Flickr**.

You can also reach us by phone at 1-800-668-2642 or by fax at 1-800-245-9274.

Outside Canada call 613-748-2003 or fax to 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.

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# Property & Home Maintenance Management Workshop

## Day 1:

8:30 – 9:00am	Welcome and Introductions
9:00 – 10:15am	Overview on Housing Maintenance <ul style="list-style-type: none"> <li>▪ Types of maintenance</li> <li>▪ The importance and benefits of maintaining homes</li> </ul>
10:15 – 10:30am	Refreshment Break
10:30 – 11:30pm	Assessing the Priority of Maintenance Work
11:30 – 12:00pm	Beware of Funding Restrictions! <ul style="list-style-type: none"> <li>▪ Funding Exercises</li> </ul>
12:00 – 1:00pm	Lunch
1:00 – 1:30pm	Maintenance Strategies for Limited Budgets <ul style="list-style-type: none"> <li>▪ Tendering supply and service contracts</li> <li>▪ Economies-of-scale</li> <li>▪ Standardization of materials</li> <li>▪ Preventive maintenance</li> <li>▪ “Responsible Postponement”</li> <li>▪ Requiring tenants to perform basic maintenance tasks</li> </ul>
1:30 – 2:15pm	Introduction to Maintenance Planning <ul style="list-style-type: none"> <li>▪ 4 Step Planning Model</li> </ul>
2:15 – 2:30pm	Refreshment Break
2:30 – 4:15pm	Team Exercise – Property & Home Maintenance Plan Case Study: Preparation of a Three Year Maintenance Plan for the Little Creek First Nation
4:15 – 4:30pm	Debriefing of Day 1 and Set Up for Day 2



## Day 2:

8:30 – 8:45am	Review of Day 1
8:45 – 9:30am	Presentations on the Maintenance Planning Exercise
9:30 – 10:00am	Funding Sources for Housing Maintenance
10:00 – 10:15am	Refreshment Break
10:15 – 11:15am	Housing Maintenance – A Shared Responsibility? <ul style="list-style-type: none"><li>▪ Roles and responsibilities for maintenance in your community</li><li>▪ The importance of housing policies to support your decisions</li><li>▪ Developing and implementing change in your community</li><li>▪ The Tenants' role and tools to help</li></ul>
11:15 – 12:00pm	Development of YOUR Community Housing Maintenance Plan <ul style="list-style-type: none"><li>▪ Development of a five year community Maintenance Plan</li></ul>
12:00 – 1:00pm	Lunch
1:00 – 4:00pm	Development of Community-Specific Maintenance Plans (Cont'd)
4:00 – 4:15pm	Workshop debriefing and lessons learned
4:15 – 4:30pm	Workshop Evaluations

# Overview of the Property and Home Maintenance Management Course

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

## Making workshops work for you

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 workshop include:

- Confirming attendance requirements for the workshop (usually required by the sponsor);
- Requirements for 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, and;
- Other guidelines set by the sponsor or the group.



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The workshop facilitator will review these guidelines and discuss any additional rules your groups 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 workshop 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 your own experience and expertise to share. Your active involvement makes the best use of those experiences and knowledge.

### **Putting it into perspective**

The Property and Home Maintenance Management course 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 other courses and information on housing please contact your regional Canada Mortgage and Housing Corporation office.



# Property & Home Maintenance Management



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## Welcome and Introductions

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

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## 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.

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## Agenda – Day I

- 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 I

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## 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

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## 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?

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## 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.

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## 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

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## 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?

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## 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

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## 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

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## 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

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## 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

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## “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.

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## Maintenance Planning

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

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

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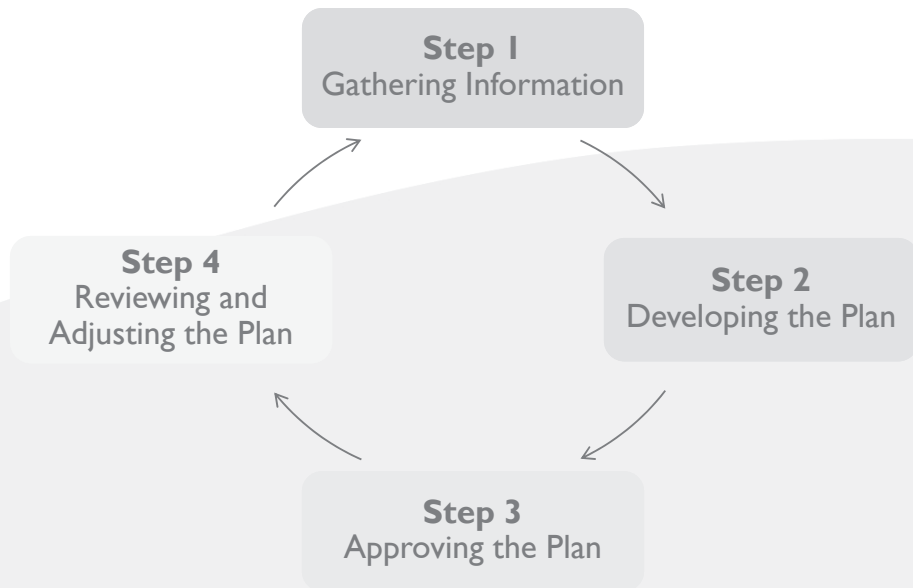
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## The Four-Step Planning Model:



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## 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.

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## 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.

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## 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

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## 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

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## 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?

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## 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**

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## 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

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## 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!

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**1) Routine Maintenance:**

(day-to-day repairs, emergency repairs):

This generally includes day-to-day basic home maintenance work that could be done by the occupant, such as tightening loose screws in cupboard or door hinges and handles, reattaching loose trim, replacing weather-stripping, etc. Routine maintenance also includes repairs to major appliances within their expected useful life, such as furnaces and hot water tanks, and repairs to major building components like flooring, windows, roofing, siding, etc. It can also include dealing with unexpected emergencies such as broken windows, repairing sump pumps, replacing leaking taps or toilet seals, etc.

If a community does not have a policy where the tenant is responsible for costs associated with tenant damage or neglect, and the Band has to pay for these types of repairs, you can expect to be paying these as part of your routine maintenance budget.

**2) Preventive Maintenance:**

(planned work or replacement of items to avoid future repairs or breakdowns)

This would include such things as servicing furnaces before they breakdown, servicing sump pumps before the wet season, cleaning chimneys before winter, securing vacant units, etc.

A good preventive maintenance schedule will include work that should be done on a cyclical basis (weekly, monthly, seasonally, annually and longer). For example, you may have a long-term plan to carry out the exterior painting of all your houses over a five year period, requiring that one-fifth of the units get repainted every year. Work scheduled to be done within the upcoming year should now be rolled into your annual Maintenance Plan.

**3) Replacement of Major Components:**

This covers the replacement of capital items such as heating systems, hot water tanks, septic fields, kitchen and bathroom fixtures, appliances, cabinets, exterior wall finishes, roofing and doors and windows – where such items have reached the end of their expected useful life. For CMHC Section 95 units, replacement of these major components may depend on eligibility of Replacement Reserve expenditures.

Every so often, major components of a house outlive their economic life and are no longer worth repairing. This type of work should also be identified and included in the Maintenance Plan.



Please review each question and circle your response:

- 1) **Section 95 Replacement Reserves can be used to fund Replacement of capital items on:**
  - a) CMHC Section 95 units
  - b) Band-Funded units
  - c) Privately owned units
  - d) All of the above
- 2) **Disabled RRAP funds can be used on:**
  - a) CMHC Section 95 units
  - b) Band-Funded units
  - c) Privately owned units
  - d) All of the above
- 3) **Surplus maintenance funds from the CMHC Section 95 allocations for maintenance can be used on:**
  - a) CMHC Section 95 units
  - b) Band-Funded units
  - c) Privately owned units
  - d) All of the above
- 4) **Regular RRAP cannot be used on:**
  - a) CMHC Section 95 units
  - b) Band-Funded units
  - c) Privately owned units
  - d) All of the above
- 5) **AANDC capital allocations can be used for:**
  - a) New construction
  - b) Renovations
  - c) Maintenance and repairs
  - d) All of the above



Please answer the following questions by checking either True or False:

	TRUE	FALSE
1) Replacement Reserves funds are monies set aside to meet the probable future cost of replacing capital items of the property or building that wear out or reach the end of their useful life.	<input type="checkbox"/>	<input type="checkbox"/>
2) Funding a Replacement Reserve is a requirement of the Section 95 Housing Program.	<input type="checkbox"/>	<input type="checkbox"/>
3) Repairs required as a result of vandalism can be charged to the Replacement Reserve fund.	<input type="checkbox"/>	<input type="checkbox"/>
4) Replacement of appliances is an eligible charge to the Replacement Reserve.	<input type="checkbox"/>	<input type="checkbox"/>
5) Your appliance repair expenses for the year averaged \$200 per unit (10 units). This can be charged to the Replacement Reserve.	<input type="checkbox"/>	<input type="checkbox"/>
6) Your community has decided that linoleum, rather than carpeting, will be installed in future housing projects. Ten units (built three years ago) have carpeting. This should be removed and replaced with linoleum and the cost charged to the Replacement Reserve fund.	<input type="checkbox"/>	<input type="checkbox"/>
7) You can not take advantage of bulk purchasing discounts for eligible Replacement Reserve expenditures.	<input type="checkbox"/>	<input type="checkbox"/>
8) You can replace a capital item with an item of higher quality.	<input type="checkbox"/>	<input type="checkbox"/>
9) The annual allocation for the Replacement Reserve is set at the time of project commitment and can never be changed.	<input type="checkbox"/>	<input type="checkbox"/>
10) Interior painting is not an eligible Replacement Reserve expenditure.	<input type="checkbox"/>	<input type="checkbox"/>



### 1) Tender Supply and Service Contracts

Use a competitive process, at least every three years, to obtain the best cost and value for maintenance and repair materials and service contractors. Consider securing “Standing Offer” agreements with plumbing, electrical and heating companies to handle servicing and emergency repairs; and with suppliers for your furnaces, HRVs, washers and dryers, and refrigerators and stoves where applicable. This will avoid last minute searching for a contractor to handle an emergency repair or a supplier to provide an appliance and paying a premium price for it.

### 2) Take Advantage of “Economies-of-Scale”

Benefiting from “economies-of-scale” means buying more at a reduced “per unit” cost. For example, if you put out a tender for five houses needing new roofs, instead of doing one at a time, it will likely attract more companies (more competition for a better price) and they should be able to pass on savings to you because they will buy a greater bulk of materials at one time and save on mobilizing their work force to one site rather than five sites at different times.

### 3) Standardize Your Selection of Fixtures and Appliances

If all your washers and dryers, furnaces, HRVs, toilets and faucets were of the same type or brand, it limits the amount of different maintenance and repair supplies (filters, pumps, switches, tap washers, floats, handles, etc.) you need to stock or order, and you can interchange parts from older, surplus units to others still in service.

### 4) Perform “Preventive Maintenance”

“An ounce of prevention is worth a pound of cure”. In other words, money spent on preventative maintenance will avoid costly breakdowns and save you maintenance and repair dollars. Remember to change furnace filters; clean HRVs and chimneys; paint exterior wood finishes and so on, to avoid more costly repairs.



## 5) Perform “Responsible Postponement”

Sometimes you do not have sufficient funds to do all the repairs you would need to do. But putting the repair off for another year could result in more costly collateral damage. What can you do? Don't just postpone the work; do a temporary repair to get you through another year without more damage. For example, if you need five new roofs but only have enough money for four, consider replacing three roofs and using the remaining money to do a good patching of the other two roofs. This “responsible postponement” will avoid further damage from water leakage until you can afford to replace those remaining two roofs.

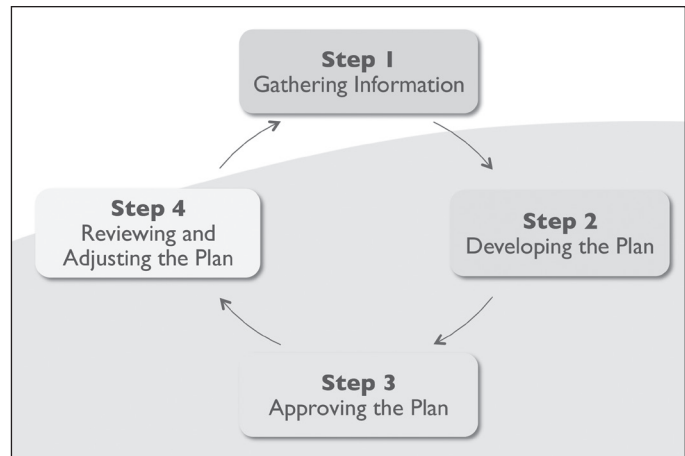
## 6) Train Tenants to Perform Basic Home Maintenance

Requiring and training the tenants to perform basic home maintenance tasks in their own homes will save the Housing Department time and money which could be used to more serious or larger repair projects. Since they live in the house, tenants see minor maintenance needs right away and can respond on a timely basis which in turn will avoid more costly and unnecessary repairs or replacements later.

Attach a list of specific basic maintenance items to the Tenancy Rental Agreement and counsel the tenants on their responsibility. Show them how to carry out the maintenance items, such as changing the furnace filter or cleaning the HRV. This can be done at the time of move-in. You could also arrange for a Basic Home Maintenance workshop for a group of tenants required to carry out such tasks.

## Step 1—Gathering Information

Be sure to have all of the information required to complete the plan. Be sure that the information is accurate. If historical data is not available and projections are being used, be sure that they are realistic. Examples of some of the information you should gather are: community goals, copies of related reports (e.g. unit condition reports), annual plans, and operating budgets. Plan to involve everyone in your team (e.g. Housing Committee Member, staff, technical services, Finance Officer, Band Council, etc.) throughout the four-step planning process. Information should also be gathered by conducting inspections. There are a number of different inspections that should be taking place regularly including annual inspections, Physical Condition Reviews, move-in and move-out inspections.



## Step 2—Developing the Plan

There are two types of plans that need to be developed – an annual plan and a long term plan. An annual plan describes in detail what you propose to do in the next 12 months. The annual plan should clearly identify the priorities, work items, time frames and the human and financial resources required.

A long term plan that focuses on what you want to have happen over the next three to five years. This describes, at a high level, the work that will be accomplished. When analyzing the information you have gathered, consider the following points:

- What are the priorities that have been identified by your community?
- Are there enough human and financial resources to deliver the service?
- When can work be completed?
- Are there program restrictions that need to be considered?
- Are there areas of concern that have been identified during inspections?

When writing your plan, answer the 5 Ws:

- **Why** is this task necessary, does it respond to the goals?
- **What** tasks will be completed over the next 12 months (action plan)?
- **Who** will be responsible for completing each task?
- **When** will each task be completed by?
- **Where** will the human and financial resources come from?

### Step 3—Approving the Plan

You will need to seek and obtain support for the plan, and ensure that it is approved by the proper authorities.

When seeking approval of the plan, consider doing the following:

- formally submitting the written plan for approval,
- following up with a presentation that describes the benefits of following the plan,
- being prepared to answer questions and respond to concerns, and
- keeping a record of the decisions made regarding the plan.

Once the plan is approved, prepare to implement the plan by:

- communicating the high-level details of the plan to the Housing Committee, Band members and tenants; and,
- developing a Question and Answer information sheet for Chief and Council, Housing Committee Members and staff to use when handling inquiries.

### Step 4—Reviewing and Making Adjustments

The best plans are those that are reviewed on a regular basis (at least once every three months).

As part of your regular review process, you should be:

- Reviewing progress with team members (is everything on track),
- Conducting regular inspections of all units (annual, move-in and move-out)
- Reviewing building inventory. These are regular parts that are needed to conduct maintenance. This requires some balancing between availability of equipment on an “as needed” requirement vs. carrying inventory.
- Updating the plan as tasks are completed, (includes moving completed tasks to their next scheduled date)
- Identifying the problem and reassigning resources, if necessary, for tasks that are behind schedule,
- Preparing regular progress reports and making them available to the community, and
- Celebrating and sharing successes.

## Instructions

The objective of this exercise is to work out strategies to get the most maintenance and repairs accomplished with the limited budget available. The result of your team's work will be a three-year Property & Home Maintenance Management Plan (see forms).

### Remember the key steps of the Planning Model:

- Step 1:      Gathering Information
- Step 2:      Developing the Plan
- Step 3:      Approving the Plan
- Step 4:      Reviewing and Making Adjustments

In completing this exercise, you will apply the 4-steps of the planning models as follows:

**Step 1:**      Read **all** the information carefully;

**Step 2:**      Analyze all the information with your team;  
Determine the urgency and priority of each work item;  
Consider “strategies” for doing more with less; and,  
Prepare your three-year Property & Home Maintenance Plan.

**Step 3:**      Prepare a flip-chart to present:

- the priorities of your plan (urgency of work items);
- the “strategies” considered for getting the most done;
- the highlights of your three-year Maintenance Plan.

Appoint a spokesperson to review the flip-chart notes with the class and present your three-year Maintenance Plan for approval by council.

**Step 4:**      Reviewing and making adjustments to the plan (for unforeseen events) can only be done after the plan is being implemented so it is not a part of this exercise. However, be prepared for Council members to have some “what if” questions...

## Little Creek First Nation – Housing Overview

**Community Description:** Situated in the northern half of the province, Little Creek First Nation consists of 45 single-family detached units, built since 1985 under various funding programs as follows:

Phase	Year Built	# of Units	Program
1	1985	5	AANDC Capital Funds
2	1988	5	AANDC Capital Funds
3	1992	5	AANDC Capital Funds
4	1997	10	CMHC Section 95 On-Reserve Housing Program
5	2000	10	CMHC Section 95 On-Reserve Housing Program
6	2005	5	CMHC Section 95 On-Reserve Housing Program
7	2010	5	First Nations Market Housing Fund (privately owned)

### General Condition of the Portfolio:

#### Phases 1-3:

These units were built using AANDC Capital Funds. A few years ago the Band had to make a decision regarding these older projects: either do a major rehabilitation or get rid of them. The oldest project (5 units built in 1982) was written off and the former occupants were moved into the 5-unit 2005 project. However, the 1985, 1988 and 1992 projects have been fully rehabilitated except for the exterior wall finishes, which are now urgently needed to avoid interior damage (See *Unit Condition Report – Phases 1-3*).

#### Phases 4-6:

Of the 25 units built under the CMHC Section 95 On-Reserve Housing Program, all have received annual maintenance through the operating budget, and are generally in a state of good repair. However, due to age and normal wear and tear, the 1997 project is beginning to have roofing issues; new furnaces must be considered for the 2000 project; and, the 2005 project is in need of some interior and exterior repairs, as detailed in the *Unit Condition Report – Phases 4-6*.

**Phase 7:**

These units are privately owned, with loans provided through the First Nations Market Housing Fund (FNMHF). These units are new and in excellent condition with the owners responsible for all maintenance and repairs. After they are more than 5 years old, they may be eligible to receive repair assistance (i.e. RRAP program).

**Community's Housing Goals:**

1. All band members should have access to affordable and adequate housing.
2. Housing is a shared responsibility and as such all members should contribute to the cost and maintenance of their unit, either directly (ownership) or through the Housing Department (rental).
  - Completing the rehabilitation of the units in Phase 1-3 is a priority therefore the full AANDC Capital Allocation shall be used to this purpose until all 15 units have been fully repaired.
  - A housing charge will be implemented on each unit in Phases 1-3 in the year **AFTER** they have been fully rehabilitated. To make sure funds are set aside to address maintenance and repair issues, \$250 from the monthly housing charge on each unit will be automatically set aside for maintenance.

**Housing Policy (excerpt only):**

All members living in Band-owned housing will be expected to look after basic home maintenance items, as outlined in the Housing Agreement. The Housing Department will ensure members receive basic home maintenance training **PRIOR** to taking possession of their house and/or immediately after new equipment has been installed or repairs completed.

**Maintenance Budgets:****Phases 1-3:**

The Little Creek First Nation receives an annual AANDC Capital Allocation of \$26,000.

For each fully rehabilitated unit, an additional \$250 of the monthly average housing charge (\$3,000 annually) will be allocated to the Housing Department for housing maintenance.

**Phases 4-6:**

Similar to Phases 1-3, the Housing Department receives \$250 of the monthly average housing charge (\$3,000 annually) for housing maintenance on units in phases 4-6. In addition, the Housing Department may draw on the accumulated Replacement Reserve for eligible replacement reserve expenses. (See below for a list of items that can be covered through the Replacement Reserve Fund).

Accumulated Replacement Reserve Amounts: Phase 4 - \$12,000

Phase 5 - \$12,000

Phase 6 - \$ 8,000

**Band Council Direction:**

Note that all repairs need to be done within existing budgets – Going into deficit is not allowed.

Chief and Council have approved the community's housing goals, policy statements and maintenance budgets for the next three years.

The Unit Condition Report recommendations have been accepted in full.

The Housing Department is now directed to prepare and present to Council a three-year Property & Maintenance Management Plan which endeavors to bring all Band-owned units to a state of good repair by the end of year 3.

**Eligible Replacement Reserve Expenses****1. Major building components:**

- roofs, including coating, flashing, eaves-trough and downspouts
- exterior wall finishes, including exterior painting and stucco
- exterior doors and windows
- exterior caulking where accessibility is a major restriction (e.g., requiring scaffolding) and the replacement is therefore a major undertaking

**2. Major building services:**

- heating systems, including boilers (hot water or steam), forced air furnaces, radiant heat components, solid fuel burning systems, chimneys and related components
- domestic hot water tanks, booster pumps and circulating pumps (fittings and controls replaced during the course of regular, routine maintenance are not eligible)
- septic tanks and tile beds
- required air handling systems (e.g. HRV systems)

**3. Basic facilities:**

- kitchen facilities such as stoves and refrigerators, sink and faucet installations, counter tops and cabinets
- bathroom facilities such as toilets, sinks and fixtures, vanities, tubs and fixtures

**4. Safety features:**

- fire alarm systems such as carbon monoxide detectors, hardwired smoke alarms, smoke and heat detectors linked to central alarm
- required fire fighting or prevention equipment (e.g. fire extinguishers)
- emergency lighting
- intercom system in multiple unit buildings
- other safety items

**5. Other major facilities, equipment and features:**

- garages or storage areas, driveway, walkway and parking surfaces
- interior floor coverings, including common areas and suites
- exterior fences
- laundry equipment
- water softeners where hardness of well water makes these a necessity

**6. Regulated changes:**

- requirements for changes that apply to existing buildings and where the authority having jurisdiction requires replacement or upgrading within a definite period of time (e.g. fire safety)



## Unit Condition Report

### Phases 1-3:

5 units	Built in 1985	Interiors rehabilitated in 2008
5 units	Built in 1988	Interiors rehabilitated in 2010
5 units	Built in 1992	Interiors rehabilitated in 2012

### Exterior Wall Finishes:

All 15 of these units are generally in good condition with the exception of the exteriors. It is recommended that 1 ½ inches of insulation be added to the exterior with new siding, soffit, fascia and eavestrough. The following costs have been identified:

	Year 1	Year 2	Year 3
Per unit:	\$5,000	\$5,500	\$6,050
If 3 or more units:	\$4,000	\$4,400	\$4,840
Temporary sealing:	\$500	\$550	\$605

Cost increase per year: 10%

**Note:** Any units not completed in Year 1 MUST be temporarily patched/sealed to avoid water damage to the interior insulation and finishes. And those units not completed in Year Two must again be patched/sealed until repaired in Year 3.

### Regular Maintenance / Emergency Repairs:

Every housing unit requires a minimal level of servicing and repairs that might be beyond the basic home maintenance expected of the occupants. This would be for servicing or small repairs required due to normal wear and tear.

It is recommended that a budget of \$500 per unit per year be applied for this purpose.

## Unit Condition Report

### Phases 4-6:

10 units	Built in 1997	New roofs pending
10 units	Built in 2000	New furnaces pending
5 units	Built in 2005	Interior wall repairs pending Exterior Landings, steps and rails pending

#### Phase 4: 1997 Project – New Roofs:

As indicated by a review of work orders and tenant complaints over the past year, the roofs of the 1997 project are starting to leak in some locations due to age. The roofs of all 10 of these units must be replaced within the next three (3) years to avoid substantial collateral damage to the interior finishes. The following costs have been identified:

	Year 1	Year 2	Year 3
Per unit:	\$6,500	\$7,150	\$7,865
If 3 or more units:	\$6,000	\$6,600	\$7,260
Temporary sealing:	\$500	\$550	\$605

Cost increase per year: 10%

**Note:** Any roofs not replaced in Year 1 or 2 MUST be temporarily patched/sealed annually to avoid water damage to the interior insulation and finishes.

#### Phase 5: 2000 Project – New Furnaces:

As indicated by a review of work orders and tenant complaints over the past year, the furnaces in the 2000 project units are requiring more frequent servicing and even emergency repairs due to shut down. These heating systems have reached the limit of their life expectancy and should be replaced as soon as possible and certainly within three (3) years. With some costly servicing/repairs, some may be serviceable for two more years. The following costs have been identified:

	Year 1	Year 2	Year 3
Per unit:	\$6,000	\$6,600	\$7,260
If 3 or more units:	\$5,500	\$6,050	\$6,655
Temporary Servicing:	\$500	\$550	\$605

Cost increase per year: 10%

**Note:** Any furnaces not replaced in Year 1 or 2 MUST be serviced / repaired annually to ensure reliability and safety until replaced.

**Phase 6: 2005 Project – Interior Wall Repairs:**

Unit inspections identified numerous holes and damages to the interior drywall finishes. It is recommended that the drywall be repaired and the units repainted. The following costs have been identified:

	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>
Per unit:	\$2,750	\$3,025	\$3,328
If 3 or more units:	\$2,500	\$2,750	\$3,025

Cost increase per year: 10%

**Phase 6: 2005 Project – New Landings, Steps and Railings:**

Unit inspections have identified all the exterior landings, steps and railing in various stages of disrepair, some even presenting serious safety hazards. All should be replaced as soon as possible and certainly within three (3) years. The following costs have been identified:

	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>
Per unit:	\$4,500	\$4,950	\$5,445
If 3 or more units:	\$4,000	\$4,400	\$4,840

Cost increase per year: 10%

**Note:** For health and safety reasons, this work must be given a priority basis.

**Regular Maintenance / Emergency Repairs:**

Every housing unit requires a minimal level of servicing and repairs that might be beyond the basic home maintenance expected of the occupants. This would be for servicing or small repairs required due to normal wear and tear.

It is recommended that a budget of \$500 per unit per year be applied for this purpose.

## Property and Home Maintenance Management Plan

Project ID: \_\_\_\_\_

Phase: \_\_\_\_\_

Year of Construction: \_\_\_\_\_

# of Units: \_\_\_\_\_

Program Type: \_\_\_\_\_

Year \_\_\_\_\_ of Plan (Year 1, 2 or 3)

Total Budget Available: \$ \_\_\_\_\_

Details of Available Budget:

\_\_\_\_\_

Base \$

\_\_\_\_\_

Carry-In \$

\_\_\_\_\_

Rent / Arrears \$

\_\_\_\_\_

Replacement Reserve

Type of Repair	# of Units	Cost per Unit		Total Cost	Notes / Details and Defferals to Next Year
<b>Regular Maintenance and Emergency Repairs</b>			=		
<b>Foundations:</b>			=		
Replacement			=		
Repairs _____			=		
<b>Exterior Repairs:</b>			=		
* New ext. wall finish			=		
* New windows / doors			=		
Soffit/Facia/Eavestrough			=		
Repairs _____			=		
<b>Roofing:</b>			=		
* New roof			=		
Repairs _____			=		
<b>Property Upgrades:</b>			=		
Grading			=		
Driveway			=		
Other _____			=		
<b>Interior Repairs</b>			=		
New drywall			=		
Kitchen			=		
Flooring			=		
Doors/Trim			=		
Painting			=		
<b>Mold remediation:</b>			=		
<b>Appliances:</b>			=		
* New Stove			=		
* New Fridge			=		
* New Washer			=		
* New Dryer			=		
* New HRV			=		
<b>Heating:</b>			=		
* New Furnace			=		
* New Electric heaters			=		
Repairs _____			=		
<b>Plumbing:</b>			=		
* New well / septic system			=		
* New H/W tank			=		
* New fixtures			=		
Repairs _____			=		
<b>Electrical:</b>			=		
Wiring			=		
Fans			=		
Lights			=		
Repairs _____			=		
<b>Other</b>			=		
<b>Subtotal:</b>					* Minus eligible amount charged to RR
<b>Total Cost:</b>					Carry-over to Next Year
Note: Not to exceed Total Budget Available (as above)					



## CMHC and Band-Funded Phases

	Year 1	Year 2	Year 3	TOTAL
Budget Allocation				

	Year 1	Year 2	Year 3	TOTAL
Maintenance Item	Expenses	Expenses	Expenses	
Regular Maintenance				
Exterior Repairs				
Roofs				
Furnaces				
Steps & Landings				
Interior Repairs				
Other				
<b>TOTAL COSTS</b>				







## Annual Inspection Checklist

### Interior Main Floor

	Acceptable		
	Yes	No	N/A
Housekeeping			
Stairs, Handrails, Stairwell Finish			
Finish Floors, Wall & Ceiling			
Lights, Wall Outlets (Functional?)			
Plumbing Fixtures			
Bathtub/Waterproof Wall Finish/Caulking			
Doors & Hardware (Including Closets)			
Windows/Screens			
Kitchen And Bathroom Cupboards			
Smoke Alarms (Functional?)			
Carbon Monoxide Alarm (Functional?)			
Drapery Rods			
Stove/Fridge			
Exhaust Fans			
Baseboard Heaters			
Other _____			

Please note any issues identified here:

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**Interior Lower Floor (Basement)**

	Acceptable		
	Yes	No	N/A
Foundation/Slab (Water Leaks, If Any)			
Heating Equipment, Furnace (Main System)			
Heating Equipment (Ductwork, Filters, Etc)			
Exposed Plumbing Pipes (Water Leaks, If Any)			
Storage Area			
Garbage Or Debris			
Finished Walls, Door Trim			
Finished Floors			
Plumbing Fixtures (Including Hot Water Tank, Laundry Tub)			
Sump Pump			
Windows/Screens			
Wood Stove/Clearances/Smoke Pipe			
Washer Dryer			
Exposed Framing			
Fire Alarms (Functional?)			
Carbon Monoxide Alarm (Functional?)			
Other _____			

Please note any issues identified here:

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## Annual Inspection Checklist

## Exterior

	Acceptable		
	Yes	No	N/A
Roof Condition			
Gutters & Downspouts			
Exterior Finish Including Soffits/Eaves, Painting			
Attic/Crawlspace Ventilation			
Chimney, Mortar Joints, Flashing And Cleaning			
Windows/Doors And Hardware (Including Weather-Strip)			
Entry Steps/Stairs			
Electrical Entry			
Sundeck, Guardrail & Stairs			
Exterior Site Drainage/Litter			
Landscaping			
Walkways/Driveway			
Septic Tank, Regular Cleaning,			
Pumping, Etc			
Other _____			

Please note any issues identified here:

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## Maintenance History

Address: \_\_\_\_\_

Tenant: \_\_\_\_\_

CMHC Account Number: \_\_\_\_\_

Year Built: \_\_\_\_\_

Phase Number: \_\_\_\_\_

## Maintenance History

[illegible]

## Move In / Move Out Condition Report

Fill out in complete detail on the day the Tenant moves in and moves out.

Tenant's Name	Address	Lot No.
Sponsor Name	Phase No.	CMHC Account No.

Incoming Report - Dated __/__/__	Condition O.K.		Condition O.K.	Outgoing Report - Dated __/__/__
Remarks				Remarks
		<b>Kitchen</b>	Stove	
			Fridge	
			Cupboards	
			Walls	
			Floor	
		<b>Bathroom</b>	Walls	
			Floor	
		<b>Dining Room</b>	Walls	
			Floor	
		<b>Living Room</b>	Walls	
			Floor	
		<b>2nd Bedroom</b>	Walls	
			Floor	
		<b>3rd Bedroom</b>	Walls	
			Floor	
		<b>Windows</b>		
		<b>Basement</b>		
		<b>Other</b>		

No. of Key Provided: \_\_\_\_\_

No. of Keys Returned: \_\_\_\_\_

Charges	\$	<p>The undersigned tenant(s) certify that I/we have inspected the above mentioned unit and have found the suite and its contents to be in the condition as indicated. I/we understand that any future damage which occurs in this unit shall be rectified at my/our expense through direct billing or security deposit deduction.</p> <p><b>Incoming</b></p> <p>_____ Inspector/Housing Manager's Signature</p> <p>_____ Tenant's Signature</p> <p><b>Outgoing</b></p> <p>_____ Inspector/Housing Manager's Signature</p> <p>_____ Tenant's Signature</p>
Cleaning floors, walls cupboards, windows and fixtures:		
Machine cleaning carpets:		
Cleaning stove, fridge and other appliances:		
Repairs as follows:		
TOTAL		

(USE BACK OF FORM FOR ADDITIONAL INFORMATION)

## Record of Appliance and/or Equipment

Located at Address		
Lot No.	Phase No.	CMHC Acct. No.
Housing Mgr Name		Tenant Name
Date of Record Update	Appliance/Equipment Type	

Make and Description					
Serial No.	Decal No.	P.O. No.	Cost \$	Date Purchased	
Supplier			Guarantee Expires	Service Contract	Service Contract Cancelled
When Serviced			Service Cost		

[illegible][illegible]

## Tenant Rental Payment Record

\_\_\_\_\_ Unit

Name	
Assessed Rental Rate	Subsidy
House Number	LEM/Economic Rent
Address	Date
	Income
	Number of Occupants
Telephone	Phase No.

Date	Receipt No.	Period	Rent Charged	Rent Paid	Rent Owning or Unpaid	Comments







# Workshop Evaluation Form

## Workshop Evaluation Form

Course Title

### HOW DID WE DO?

This is your chance to tell us what you think of this workshop. Answering the questions on this form will help CMHC design and present workshops that will better meet your needs.

Workshop Category Property & Home Maintenance Management		Date	Date
		to	
Workshop Location	Your First Nation	Province	
Facilitator's Name(s)			
1. I am a ... (Select the one that best describes you - choose one only)			
<input type="checkbox"/> 1. Housing Department Staff	<input type="checkbox"/> 2. Financial Officer	<input type="checkbox"/> 3. First Nation Administration Staff/Band Manager	
<input type="checkbox"/> 4. Housing Occupant/Community Member	<input type="checkbox"/> 5. First Nation Chief or Council Member	<input type="checkbox"/> 6. Housing Committee Member	
<input type="checkbox"/> 7. Builder/Renovator/Carpenter/Labourer	<input type="checkbox"/> 8. Inspector	<input type="checkbox"/> 9. Health Care Professional/Nurse	
<input type="checkbox"/> 10. Other, please specify: _____			
2. Overall, how useful was the workshop?			
<input type="checkbox"/> 1. Not at all useful	<input type="checkbox"/> 2. Not very useful	<input type="checkbox"/> 3. Neutral	<input type="checkbox"/> 4. Useful
<input type="checkbox"/> 5. Very useful			
3. How effective was the presentation and communication?			
<input type="checkbox"/> 1. Not at all effective	<input type="checkbox"/> 2. Not very effective	<input type="checkbox"/> 3. Neutral	<input type="checkbox"/> 4. Effective
<input type="checkbox"/> 5. Very effective			
4. How effectively were your questions and needs addressed?			
<input type="checkbox"/> 1. Not at all effectively	<input type="checkbox"/> 2. Not very effectively	<input type="checkbox"/> 3. Neutral	<input type="checkbox"/> 4. Effectively
<input type="checkbox"/> 5. Very effectively			
5. Was the workshop material clear and easy to follow?			
<input type="checkbox"/> 1. Not at all clear	<input type="checkbox"/> 2. Not very clear	<input type="checkbox"/> 3. Neutral	<input type="checkbox"/> 4. Clear
<input type="checkbox"/> 5. Very clear			
6. How likely are you to use what you learned in the workshop?			
<input type="checkbox"/> 1. Not at all likely	<input type="checkbox"/> 2. Not very likely	<input type="checkbox"/> 3. Neutral	<input type="checkbox"/> 4. Likely
<input type="checkbox"/> 5. Very likely			
7. To what extent has your level of knowledge on this topic increased?			
<input type="checkbox"/> 1. Remained the same	<input type="checkbox"/> 2. Increased somewhat	<input type="checkbox"/> 3. Increased significantly	

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## Workshop Evaluation Form (cont'd)

8. As a result of attending this workshop what will your next steps be in using the information in your community?

Add/remove  
question

If you have any comments about this workshop, please write them here.

Can CMHC get in touch with you in the future to talk to you about the long-term impact of the workshop?  
If we can, please write your contact information in the space below.

Name

Telephone

Email

Address