

# HOUSING QUALITY MATTERS

for FIRST NATIONS



## Property Management Planning

### PARTICIPANT MANUAL



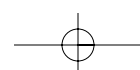
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First Nations

PROPERTY MANAGEMENT PLANNING – Participant Manual

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65166



# HOUSING QUALITY MATTERS

for FIRST NATIONS



## Property Management Planning

### PARTICIPANT MANUAL

22-05-07

## CMHC—HOME TO CANADIANS

Canada Mortgage and Housing Corporation (CMHC) has been Canada's national housing agency for over 60 years.

Together with other housing stakeholders, we help ensure that Canada maintains one of the best housing systems in the world. We are committed to helping Canadians access a wide choice of quality, affordable homes, while making vibrant, healthy communities and cities a reality across the country.

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# PROPERTY MANAGEMENT PLANNING

PARTICIPANT MANUAL



notes

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Cette publication est aussi disponible en français sous le titre: *Planification de la gestion immobilière – Manuel du participant*, OPIMS # 65167.

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notes

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Roxanne Harper, Turtle Island and Associates  
Kim Kremzar, Turtle Island and Associates

CMHC would also like to thank the Aboriginal Housing staff for their role in the development of this workshop.

## AGENDA

notes

### Day One

- 9:00 Welcome and introduction of participants  
Review of workshop objectives and agenda  
Property management planning  
Goal setting as part of the planning process  
Four-step planning model—Financial planning
- 12:00 Lunch
- 1:00 Case study—Developing a financial plan  
Replacement reserve exercise  
Summary exercise
- 4:30 Wrap-up

### Day Two

- 8:30 What is maintenance planning?  
Large group exercise: Budget availability  
Four-step planning model—Maintenance planning
- 12:00 Lunch
- 1:00 Case study—Developing a three year maintenance  
plan  
Summary exercise
- 4:30 Wrap-up/Workshop evaluation

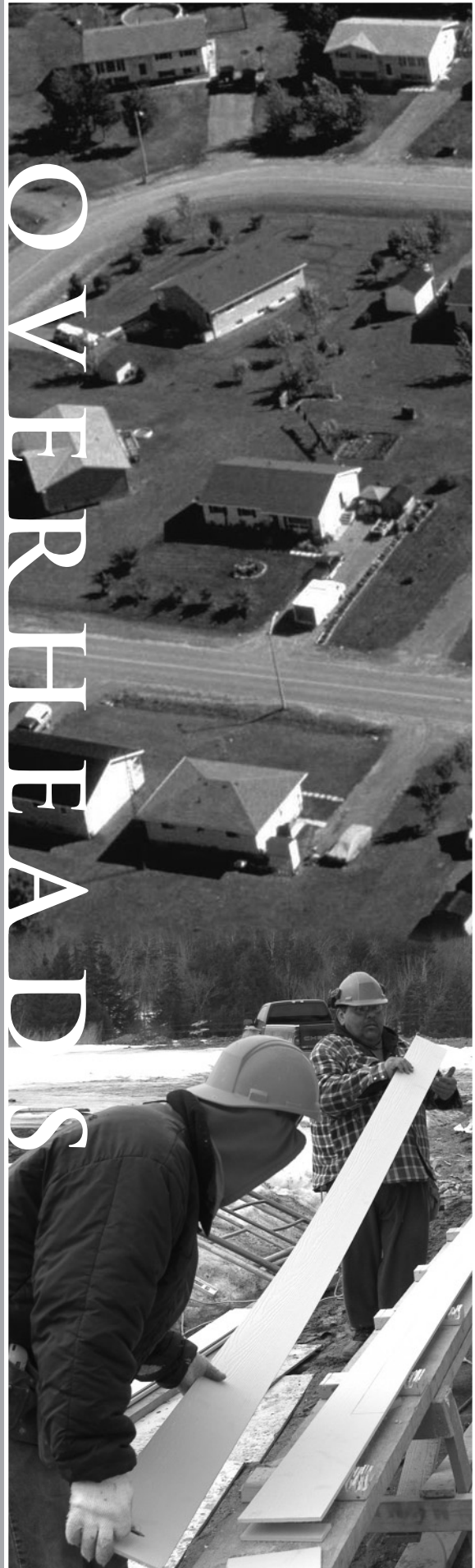
Note: Though not shown, coffee breaks will be scheduled throughout the workshop.





# OVERHEADS

# OVERHEADS





# PROPERTY MANAGEMENT PLAN

## **Developing a Property Management Plan**

### **Workshop Objective:**

To review the steps involved in developing a property management plan. Participants will apply the planning model and develop a one-year financial plan (budget) and a three-year maintenance plan.

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# PROPERTY MANAGEMENT PLAN

## **Property Management Planning:**

The detail of how housing goals will be achieved. The Plan, often referred to as a work plan, details what needs to happen to accomplish the goals, what resources are required and when the related tasks will be completed.

# PROPERTY MANAGEMENT PLAN

## **Three Aspects of Property Management Planning**

### Financial Planning

Details information on all of the revenues and expenses associated with the project.

### Physical Planning

Details all information pertaining to the maintenance and upkeep of the project.

### Human Resource Planning

Details the resources required to operate and manage the project

# PROPERTY MANAGEMENT PLAN

## What is a Goal?

A goal is a statement that describes what you want to achieve.

To be effective, the goal must be measurable, achievable, realistic and it must reflect the housing concerns of the community.

# PROPERTY MANAGEMENT PLAN

## Developing Goals

1. Determine Goals  
Identify what you want to have happen.
2. Develop Strategies  
The work plan
3. Monitor and Evaluate  
How you will check progress?



# PROPERTY MANAGEMENT PLAN

## Step 2 - Developing the Plan

Little Creek First Nation 20-Unit, Section 95 funded project Annual Budget April 1, 1998	
<b>REVENUE</b>	
Rent-Geared-to-Income (incl. SA)	
Section 95 Subsidy	
<b>Total Revenues</b>	
<b>EXPENSES</b>	
Insurance	
Maintenance & Repairs	
Administration / office rent	
Bookkeeper / I position	
Replacement Reserve fund	
Loan payment	
Audit	
Contingency	
<b>Total Expenses</b>	
<b>Surplus</b>	

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OVERHEAD #7

# PROPERTY MANAGEMENT PLAN

## Maintenance Planning

The plan you will follow to maximize the physical life of your community's housing portfolio.

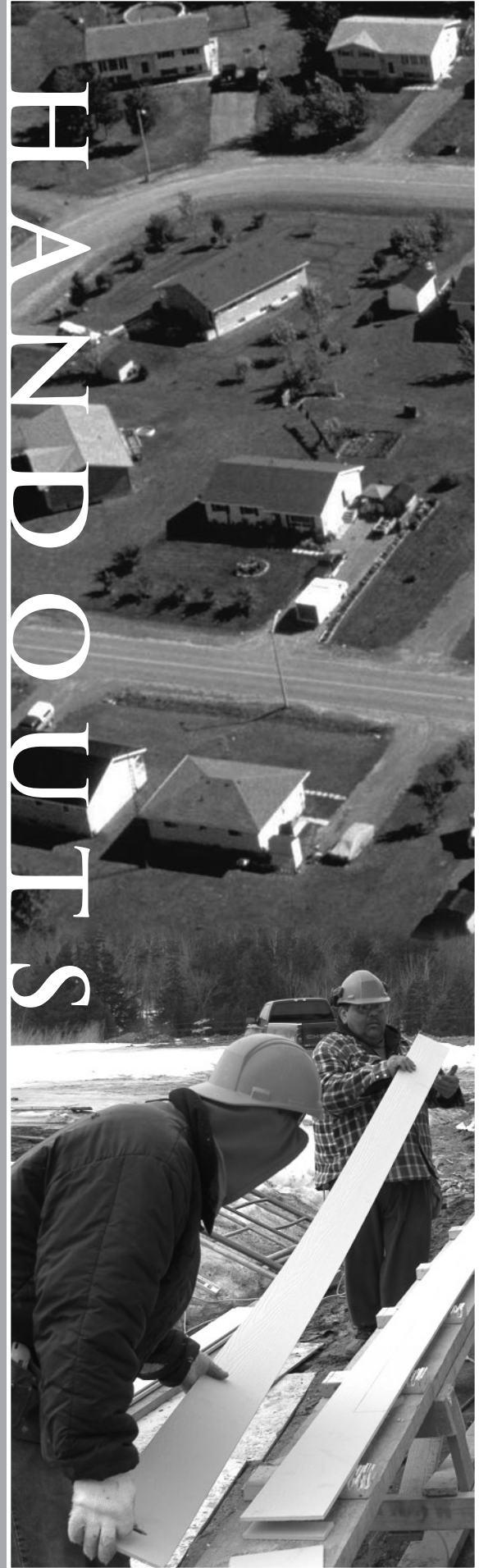
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# PROPERTY MANAGEMENT PLAN

## Maintenance Planning —Available Budget Source

Available Budget Source	Eligible for Use With:		
	CMHC Funded	Band-Funded Units	Privately Owned
Band-Funded Capital Housing Allocations			
Section 95 Operating (Maintenance) Budgets			
Disabled RRAP			
Regular RRAP			
Section 95 Replacement Reserves			
Section 95 Operating Reserves (post '96)			
Rental Revenues			
Other			

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# HANDOUTS







## HANDOUT #1

### SETTING GOALS

Goals are like directional signs or road maps: when well-planned and followed, they can guide you successfully through unfamiliar territory. When developing your property management goals consider the following key points:

#### **Determine Goals:**

- Organize a team to develop goals. Team members must be knowledgeable about housing issues and have the authority to be developing the goals.
- Write down your goals. This is the first step toward achieving them.
- Goals must be measurable so that progress can be easily seen. Be clear about what results are expected.

#### **Develop Strategies:**

- Effective goals must follow a plan that includes all of the required resources, time frames and financial considerations.
- Consider what problems may arise that could delay or prevent you from achieving goals and plan how you will deal with them.
- Effective goals are ones that are manageable. Some goals seem overwhelming and may need to be broken down into smaller tasks.

#### **Measure and Evaluate Goals**

- Complete a regular review of your goals to be sure that items are accomplished, work plans are followed and goals continue to be relevant. If problems exist, identify the area and/or individuals responsible and resolve the issue.
- Provide progress reports and highlight achievements.
- When a goal is achieved, take the time to celebrate and to congratulate the team.





## HANDOUT #2

### WRITING THE GOAL

The Goal Statement must include the following points:

- what *action* will be taken;
- what is the *result*, or final product that is required;
- who is *responsible* to complete the action; and
- the *time frame* for completion of the action.

#### Sample Goal

Inspect all Band-administered homes.

#### Sample Goal Statement

A full unit inspection (*the action*) of all band administered homes will be completed by the Technical Services Officer (*who is responsible*). Inspections will be completed over the next four years, (time frame) with 25 per cent of the units being inspected each year, beginning with the oldest units first. A written Unit Condition Report (*the result*) will be completed for each home, identifying emergency repairs, repairs required within two years and repairs required within three years.







## HANDOUT #3

### HELPFUL HINTS FOR GOAL SETTING

- Remember that when you fail to plan, you plan to fail.
- Goals must challenge your skills, but not discourage your efforts.
- Remind people about the benefits that will result from achieving the goal.
- Get everybody tuned into WII-FM (What's in it for me).
- Be persistent and be prepared to make short term sacrifices to accomplish the goal.
- Know all the resources that are required to accomplish the goal.
- Don't keep secrets. Communicate and share your goals with others.





## HANDOUT #4

### THE FOUR—STEP PLANNING MODEL

#### 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, annual plans, and operating budgets.

Plan to involve everyone in your team (e.g. Housing Committee Member, staff, technical services, Band Council, etc.) throughout the four-step planning process.

#### Step 2—Developing the Plan

There are two types of plans that need to be developed. 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. 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.

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?

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),
- updating the plan as tasks are completed,
- 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.





## HANDOUT #5

### CASE STUDY—FINANCIAL PLANNING

#### **Directions for Participants**

#### **Objective:**

By following the four-step planning model, participants will develop a one year Financial Management Plan for a Section 95 project in a fictional First Nation community.

#### **Instructions:**

Working in groups, you will receive information related to the Section 95 project in Little Creek First Nation. You will be provided with all of the information you require to proceed through the four steps of the Planning Model.

Keep in mind that the community has developed a number of housing-related goals, but only one relates to Financial Planning. The goal is as follows:

#### **Goal:**

The Manager, Housing Administration will ensure that the Housing Department operates within the budget established for that department for the period April 1, 2005 to March 31, 2006. A written budget report will be submitted by the Manager, to Chief and Council on September 30, 2005 and March 31, 2006 confirming cumulative revenues and expenses up to that date.

#### **Tasks**

- Step 1—Complete Handout #6
- Step 2—Complete Handout #7
- Step 3—Complete Handout #12
- Step 4—Complete Handouts #13 & #14





## HANDOUT #6

## STEP 1—GATHERING INFORMATION

Instructions: Match each budget category with the document description that you would use to complete the annual budget. Some documents may be useful in more than one category.

- |                                  |           |   |
|----------------------------------|-----------|---|
| 1. Section 95 subsidy            | <b>CK</b> | A. Letter from CMHC indicating the market rent is \$375 per month     |
| 2. Rent-Geared-to-Income Charges |           | B. Income verifications for each tenant                               |
| 3. Insurance                     |           | C. CMHC Operating Agreement   |
| 4. Maintenance and Repairs       |           | D. Inspection reports from Sept. 1, 2004                              |
| 5. Administration (Office rent)  |           | E. Letter from the bank confirming monthly loan payment of \$8,821    |
| 6. Salaries                      |           | F. Quotes from three insurance companies                              |
| 7. Replacement Reserve           |           | G. Unit inspection reports for all 120 units                          |
| 8. Loan Payment                  |           | H. The Section 95, 2003/2004 Audit Report                             |
| 9. Annual Audit Cost             |           | I. Band Housing Financial Statement                                   |
| 10. Other (Staff Training)       |           | J. The Section 95, 2003/2004 Project Budget                           |
| 11. Other (Travel)               |           | K. Letter from CMHC advising that subsidy has been reduced to \$6,032 |
|                                  |           | L. Payroll records  |
|                                  |           | M. Estimate of audit costs  |
|                                  |           | N. Bank statements  |







## HANDOUT #7

## STEP 2—DEVELOPING THE PLAN

**Little Creek First Nation  
20-unit, Section 95-funded project  
Annual Budget commencing April 1, 2005**

**Instructions:** You have gathered the following documents:

- a description of the Section 95 project (Handout #8)
- statement of revenue and expenses for the years 2003/2004 (Handout #9)
- inspection report summary (Handout #10)
- income verification report (Handout #11)

**Task:** Use the information in these documents to complete the budget sheet below.

<b>REVENUE</b>	
Rent-Geared-to-Income (incl. SA)	\$
Section 95 Subsidy	
<b>Total Revenues</b>	\$
<b>EXPENSES</b>	
Insurance	\$
Maintenance & Repairs	
Administration / office rent	
Bookkeeper / 1 position	
Replacement Reserve fund	
Loan payment	
Audit	
Contingency	
<b>Total Expenses</b>	\$
<b>Surplus</b>	\$





## HANDOUT #8

## STEP 2—DEVELOPING THE PLAN

**Description of the 20-unit, Section 95-funded Project**

There are 120 Band-administered homes in the community. The Section 95-funded project, built in 1990/91, consists of 20 units: all are three-bedroom bungalows. All tenants, except for those receiving Social Assistance (SA), pay for their own Hydro. For those on SA, the Social Services Department pays the Hydro bill directly.

The 20-unit project had a Final Capital Cost of \$1,600,000 and a loan of \$1,120,000. The loan was renewed on April 1, 2004 for a five-year term, beginning May 1, 2004. The revised monthly loan payments are  $\$8,821 \times 12 = \$105,852$  and the *subsidy payments are*  $\$6,032 \times 12 = \$72,384$ .

The Little Creek First Nation provides office space, phone, fax and supplies to the Section 95 project for a monthly fee. Historically, the First Nation has increased the Section 95 *administration costs by \$100 per year (includes travel and training costs)*.

Initially, the Little Creek First Nation hired a full-time bookkeeper to look after the Section 95 project at an annual salary of \$25,000 (including benefits). During the 2003-2004 fiscal year, the First Nation reviewed operations and noted that the bookkeeper spent less than half of her time working on the Section 95 program, the rest on other areas of band operations. The cost of her salary is now divided between different departments and reflects actual time spent on each function. *You only charged \$10,400 (including benefits) of her salary to the housing program.* During 2004, the First Nation purchased new computer equipment and software and expects that the time required to maintain the Section 95 program housing records *will be further reduced by half to \$5,200 per year.*

In the past, the Little Creek First Nation has done maintenance work only when complaints have been made by the tenants. In an effort to be more proactive and efficient in its maintenance spending, the First Nation has done inspections on each of the 120 Band-administered houses to determine the actual condition and maintenance priorities. This report was just completed and passed to the Housing Counsellor (see Handout #10).

The Little Creek First Nation must deposit *\$10,000 each year into a Replacement Reserve account.* There have been no withdrawals from the account.

The auditor has informed you that he will not be increasing his fee this year. (\$1,000)

This year, the Band wants to plan *a contingency of \$1,230.*

The Little Creek First Nation has been investigating the benefits of insuring all of the Band-administered houses and has received quotes from three equally acceptable insurance companies. Two companies provided a quote based on all 120 units. *The first quote was for \$40,800 (\$340 per unit).* The second company provided a per-unit quote of \$350. The third quote was based on insurance for only the 20-unit, Section 95 project and this quote was \$6,700 but did not cover claims resulting from "an Act of God" (e.g. wind storm, ice storm, flooding, etc.).



**HANDOUT #9****STEP 2—DEVELOPING THE PLAN**

**Little Creek First Nation  
20-unit, Section 95-funded project  
Statement of Revenue and Expenses  
For the year ending March 31, 2004**

<b>REVENUE</b>	<b>2004</b>	<b>2003</b>
Rent-Geared-to-Income (incl. SA)	\$74,580	\$73,970
Section 95 Subsidy	\$69,696	\$105,625
<b>Total Revenues</b>	\$144,276	\$179,595
<b>EXPENSES</b>		
Insurance	\$7,500	\$7,000
Maintenance & Repairs	\$20,000	\$4,500
Administration / office rent	\$3,400	\$3,300
Bookkeeper / 1 position	\$10,400	\$25,000
Replacement Reserve fund	\$10,000	\$10,000
Loan payment	\$104,329	\$124,768
Audit	\$1,000	\$800
<b>Total Expenses</b>	\$156,629	\$175,368
Income/ Deficit for year	(\$12,353)	\$4,227
Annual Surplus/ Deficit beginning of the year	\$6,427	\$2,200
Accumulated Surplus/deficit	(\$5,926)	\$6,427



**HANDOUT #10****STEP 2—DEVELOPING THE PLAN****20-unit, Section 95-funded project  
Inspection Report Summary**

<b>Unit #</b>	<b>Mandatory Repairs</b>	<b>Optional Repairs</b>	<b>2005 projected maintenance</b>
1	\$975	\$0	\$975
2	\$600	\$0	\$600
3	\$400	\$350	\$750
4	\$1,500	\$200	\$1,700
5	\$400	\$0	\$400
6	\$1,200	\$0	\$1,200
7	\$0	\$285	\$285
8	\$1,000	\$400	\$1,400
9	\$200	\$0	\$200
10	\$750	\$25	\$775
11	\$100	\$0	\$100
12	\$0	\$310	\$310
13	\$675	\$0	\$675
14	\$260	\$0	\$260
15	\$500	\$175	\$675
16	\$1,000	\$200	\$1,200
17	\$400	\$50	\$450
18	\$500	\$320	\$820
19	\$275	\$0	\$275
20	\$200	\$1,250	\$1,450
<b>TOTAL</b>	<b>\$10,935</b>	<b>\$3,565</b>	<b>\$14,500</b>
<b>Average per units</b>	<b>\$547</b>	<b>\$178</b>	<b>\$725</b>

Note: The above figures include all labour and materials costs.







## HANDOUT #11

## STEP 2—DEVELOPING THE PLAN

**20-unit, Section 95-funded project  
Income Verification Report**

Unit #	# of Adults	# of Children	Total Persons	Income	# of bedrooms	Market Rent	Rent to Income	Actual payment
1	2	2	4	\$20,000	3	\$375	\$417	\$313
2	1	2	3	\$18,000	3	\$375	\$375	\$271
3	2	1	3	\$15,000	3	\$375	\$313	\$211
4	2	0	2	\$8,500	3	\$375	\$177	\$77
5	2	0	2	\$30,000	3	\$375	\$625	\$525
6	1	4	5	SA	3	\$375	\$371	\$371
7	2	2	4	SA	3	\$375	\$351	\$351
8	1	2	3	\$17,500	3	\$375	\$365	\$261
9	2	1	3	SA	3	\$375	\$310	\$310
10	1	3	4	SA	3	\$375	\$351	\$351
11	2	4	6	SA	3	\$375	\$387	\$387
12	1	1	2	SA	3	\$375	\$285	\$285
13	1	3	4	SA	3	\$375	\$351	\$351
14	2	4	6	SA	3	\$375	\$387	\$387
15	2	3	5	SA	3	\$375	\$371	\$371
16	1	2	3	SA	3	\$375	\$310	\$310
17	2	1	3	SA	3	\$375	\$310	\$310
18	2	3	5	SA	3	\$375	\$371	\$371
19	2	2	4	SA	3	\$375	\$351	\$351
20	2	1	3	SA	3	\$375	\$310	\$310
<b>Total Monthly Revenue</b>						\$7,500	\$7,088	<b>\$6,474</b>
<b>Total Annual Revenue</b>						\$90,000	\$85,056	<b>\$77,688</b>

Note: The income-earning tenants receive a heating allowance of \$100 per month, which is included as a deduction in the Adjusted Rent-Geared-to-Income amount.





## HANDOUT #12

## STEP 3—APPROVING THE PLAN

You are presenting the budget to Chief and Council for approval. They will be asking you the following questions. Write down your answers to these questions in the space provided and be prepared to discuss them when you make your presentation.

1. Why has the bookkeeper's time been so drastically reduced?

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2. What benefit, if any, is there to purchasing insurance coverage for every Band-administered home?

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3. Why should we be completing those repairs that are considered optional?

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4. The existing budget includes a very limited contingency. What will this cover?

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5. How will major emergencies be handled within the budget?

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## HANDOUT #13

### STEP 4—REVIEWING AND MAKING ADJUSTMENTS

It is now October 1, 2005. You have been operating for six months and received the attached report (Handout #14) from your bookkeeper.

**Part I** - Please complete Handout #14 by calculating the difference between the budget and the actual amount and noting the answers in the "Difference" column.

**Part II** - Please answer the following questions:

1. What budget items differ from the amount planned?

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2. What adjustments can you make to ensure that you stay within the budgeted plan and achieve your housing goal?

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## HANDOUT #14

## STEP 4—REVIEWING AND MAKING ADJUSTMENTS

**Little Creek First Nation**  
**20-unit, Section 95-funded project**  
**Budget Variance Report to September 30, 2005**

<b>Revenue</b>	<b>Approved Annual Budget</b>	<b>Budgeted Apr 1 - Sep 30</b>	<b>Actuals Apr 1 - Sep 30</b>	<b>Difference</b>
Rent-Geared-to-Income	\$77,688	\$38,844	\$30,000	
Section 95 Subsidy	\$72,384	\$36,192	\$36,192	
<b>Total Revenues</b>	<b>\$150,072</b>	<b>\$75,036</b>	<b>\$66,192</b>	
<b>Expenses</b>				
Insurance	\$6,800	\$6,800	\$6,800	
Maintenance & Repairs	\$14,500	\$7,250	\$10,500	
Administration	\$3,500	\$1,750	\$1,750	
Bookkeeper	\$5,200	\$2,600	\$2,600	
Replacement Reserve	\$10,000	\$5,000	\$0	
Loan payments	\$105,852	\$52,926	\$52,926	
Audit	\$1,000	\$0	\$0	
Contingency	\$1,230	\$615	\$950	
<b>Total Expenses</b>	<b>\$148,082</b>	<b>\$76,941</b>	<b>\$75,526</b>	
<b>Surplus / Deficit</b>	<b>\$1,990</b>	<b>(\$1,905)</b>	<b>(\$9,334)</b>	







## HANDOUT #15

## REPLACEMENT RESERVE

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

- |   | True                     | False                    |
|---|--------------------------|--------------------------|
| 1. Replacement Reserve 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.   | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. Replacement of appliances is an eligible charge.   | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. 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"/> |
| 6. The following formula is to be used when determining how much money you should put into the replacement reserve fund.<br><u>(# of items x cost to replace)</u> = annual requirement<br>remaining useful life   | <input type="checkbox"/> | <input type="checkbox"/> |
| 7. You cannot take advantage of bulk purchasing discounts for eligible replacement reserve expenditures.  | <input type="checkbox"/> | <input type="checkbox"/> |
| 8. 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"/> |
| 9. You can replace a capital item with an item of higher quality.   | <input type="checkbox"/> | <input type="checkbox"/> |
| 10. The annual allocation for the Replacement Reserve Fund is set at the time of project commitment and can never be changed.   | <input type="checkbox"/> | <input type="checkbox"/> |
| 11. Interior painting is not an eligible replacement reserve expenditure.   | <input type="checkbox"/> | <input type="checkbox"/> |



**HANDOUT #16****MAINTENANCE PLANNING****Types of Maintenance**

Following are the types of maintenance that should be identified and included in the maintenance plan:

**Routine Maintenance**

This generally includes work resulting from unexpected emergencies and tenant complaints.

Some examples of routine maintenance include repairs to capital items (furnaces, roofs, hot water tanks) within their expected useful life. Where there is no tenant damage policy in place, repairs required as a result of tenant damage or neglect need to be planned for under routine maintenance.

**Preventive Maintenance**

Preventive maintenance is the planned replacement of items to avoid future repairs or breakdowns.

Some examples include work such as servicing furnaces and replacing furnace fan belts before they break, recaulking around the bathtub to avoid water damage, etc. A good preventive maintenance plan includes work that is done on a cyclical basis (monthly, seasonally, annually) such as pumping septic tanks, chimney cleaning, etc. In addition, if you have a long-term plan to carry out external repainting of window trim on all units over a five-year period, you would plan for these costs as part of preventive maintenance.

**Replacement of Capital Items (major components)**

This covers the replacement of capital items or major components of the home where these items have out-lived their life expectancy and it is no longer cost-effective to continue repairing these items. Some examples of capital items include heating systems, hot water tanks, roofing, doors and window.

For Section 95-units, replacement of these components may depend on eligibility of Replacement Reserve expenditures.





## HANDOUT #17

### THE MAINTENANCE PLANNING PROCESS STEP 1—GATHERING INFORMATION

#### **Inspection Reports and Unit Condition Reports**

A complete physical inspection should be completed on each unit in order to track the overall condition of the community's housing portfolio. The inspections should be done regularly (once every three to five years) to determine what repairs are required and the priority of those repairs (e.g., within one year, within two years, etc.). Information from the inspections is needed to determine maintenance priorities and will help to co-ordinate work on a number of units requiring similar repairs.

Disabled occupants or elders may need modifications or accessibility work. Be aware of what special considerations are required and whether they are a priority item.

#### **Maintenance Files and Records for Each Unit**

The information in these files will confirm details of all the repair work that has been completed on the unit. In addition, you should have information and inventory of the equipment and appliances in each unit. All of this information will be useful for determining your short- and long-term maintenance plan and in estimating the cost of future maintenance work.

#### **Tenant Complaints and Requests for Repairs**

Your maintenance plan will need to provide for both staff time and budget to cover unplanned maintenance that results from tenant complaints or unexpected occurrences. Consider keeping a register of tenant complaints that identifies repair requests; it can help to identify common repairs or trends that could be resolved.

#### **Available Budgets**

Confirm what budgets are available to work within over the three-year period. Funds for housing maintenance and repairs are available from various sources that often have limits on their use. As you develop your Maintenance Plan, you must identify what budget can be used to fund the required work.



**HANDOUT #18****MAINTENANCE PLANNING****Eligible Budget Sources**

Please review each question and circle your response:

- 1) Replacement Reserves can be used to fund the 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 can not be used on:
  - a) CMHC Section 95-units
  - b) Band-funded units
  - c) Privately owned units
  - d) All of the above
  
- 5) INAC capital allocations can be used for:
  - a) New construction
  - b) Renovations
  - c) Maintenance and Repairs
  - d) All of the above







## HANDOUT #19

### DEVELOPING A THREE-YEAR MAINTENANCE PLAN

#### Objective:

Following the Planning Model, participants will develop a three year maintenance plan.

#### Directions to Participants:

The Housing Department for Little Creek First Nation is responsible for developing a three year maintenance plan for the housing in the community. Half of the housing department team will work on developing the plan for the Band-funded units and the remainder of the team will develop the plan for the CMHC funded units. Your kit contains all of the documentation you need to develop your portion of the plan.

#### Step 1—Gathering the Information

In Step 1, your team must review the information you have gathered. This includes:

##### **Little Creek First Nation Community Profile** (Handout #20)

This provides a brief description of the community and the condition of its housing portfolio.

##### **Community Housing Plan—Maintenance Goals** (Handout #21)

Chief and Council has approved three maintenance goals and these are included in the excerpts from the Community Housing Plan. The goals must be reflected in the three-year plan.

#### Unit Condition Reports

(Band-funded portfolio Handouts 22, 23 & 24; CMHC funded portfolio Handouts 25, 26 & 27). The technical staff have completed its review of the technical information for the portfolio and developed a summary unit condition report. Repairs are prioritized and identified as to when they should be completed (Year One, Year Two and Year Three).

#### Budgets

The Finance Department has identified the budget available for maintenance and repairs for each of the three years. This amount is noted at the top of Worksheet—Schedule of Costs for Maintenance and Repairs. The budget amount shown includes ALL of the budget available for maintenance and repairs (e.g., RRAP, Replacement Reserve, the 25% INAC capital allocation, etc.).





## HANDOUT #20

### LITTLE CREEK FIRST NATION

#### **Community Profile**

Little Creek First Nation is a northern community, located approximately 100 miles north of the Trans-Canada highway. The current population is 890 people. The community has just recently been fully serviced with hydro, water and sewer services. The Band is responsible for the administration of 120 homes.

#### **Band-administered Housing Portfolio**

There are 40 houses funded through CMHC's Section 95 On-Reserve Program. There were 10 units built in 1978, 10 built in 1982, 10 in 1988, and 10 built in 1993. The units built in 1978 are in need of some major repairs but the remaining units are generally in good condition.

There are 80 homes built through INAC capital allocations. The Band has used its INAC capital allocation for housing to build five houses per year since 1987. Due to the limited capital budget and the lack of sufficient maintenance funds, most units built before 1995 are in need of major repairs.

#### **Unit Condition Summary:**

##### **Section 95-funded Units:**

Of the 40 CMHC Section 95-funded units, all have received annual maintenance through the operating budget. The 1982, 1988 and 1993 Section 95-units are generally in a state of good repair but the older 1978 units are showing their age.

##### **Band-funded Units:**

Of the 80 Band-funded units, 40 are relatively new, 15 have been completely rehabilitated and the remaining 25 are in need of major repairs.





## HANDOUT #21

## LITTLE CREEK FIRST NATION

**Excerpts From Community Housing Plan**

**Maintenance Standard** The Little Creek First Nation has approved the use of the Existing Housing: RRAP—Standards for Rehabilitation as a guide for the minimum condition of existing Band-administered housing.

**Maintenance Goals:** The maintenance goals of the community are:

**Goal #1**

The Housing Department will ensure that all existing band-administered housing is brought up to the minimum property standards within the next three years.

**Goal #2**

Over the next three years, the Band will spend 25 per cent of the INAC capital allocation on repairs and maintenance. The remaining 75 per cent of the allocation will be spent on new construction.

**Goal #3**

The Housing Department will arrange for repairs to be completed first to the Band-funded units constructed in 1990, 1991 and 1992 and the CMHC funded units constructed in 1978. Whenever possible, repairs should be done to the oldest units first.

If possible, all repairs should be completed at the same time within each project, in order to minimize disruption to the tenants.





## HANDOUT #22

## LITTLE CREEK FIRST NATION Required Repairs—Band-funded Portfolio

YEAR ONE

### Band-funded Units

Portfolio—80 units; 5 units built each year, from 1987 to 2002 inclusive.

### Regular Maintenance

An annual regular maintenance cost of \$1,200 **must** be planned for the 15 units that have not yet been brought up to minimum property standards (units built in 1990, 1991 and 1992) for each year until the repairs are done. For the remaining 65 units, an \$800 cost **must** be planned.

**Cost: \$1,200 per unit x 15 units**  
**\$800 per unit x 65 units**

### Interior Repairs

Interior repairs are required on the 1990 units (5), 1991 units (5) and 1992 units (5). The interior walls are to be repainted, with repair to drywall where necessary. The flooring is worn and requires constant repair. Replace worn-out flooring (mix of carpet/linoleum) with resilient flooring.

**Cost: \$7,000 per unit**

### Heating Systems

Install new furnaces and chimneys in the 1990 units (5) and the 1991 units (5). The heating systems require constant repair (manufacturer out of business) and the tenants complain of being cold. It's not cost-effective to continue repairing. Install new heating system and chimney.

**Cost: \$5,000 per unit**

### Exterior Repairs

In order to reduce operating costs and bring units to minimum standards, the 1990 units (5), 1991 units (5) and the 1992 units (5) will be rehabilitated from the exterior. This includes new strapping; install GlasClad® insulation and Tyvek® air barrier; new exterior doors and windows and new siding.

**Cost: \$15,000 per unit**

### Emergency Repairs

Based on an average cost of emergency and unplanned repairs during the past two years, a cost of \$500 per unit (for all 80 units) **must** be planned for emergency repairs.

**Cost: \$500 per unit**

### Other

A member of the community requires their unit (1999) to be converted to be wheelchair accessible. The unit requires some modifications to the entryway, kitchen and bathroom (already has some accessibility items built in. This is a priority and **must** be done in Year One.

**Cost: \$8,500 for the one unit**







## HANDOUT #23

**LITTLE CREEK FIRST NATION  
Required Repairs—Band-funded Portfolio**

YEAR TWO

**Band-funded Units**

Portfolio—80 units; 5 units built each year, from 1987 to 2002 inclusive

**Regular Maintenance**

An annual regular maintenance cost of \$1,250 must be planned for the units that have not yet been brought up to minimum property standards until these repairs are done. For the remaining units, an \$850 annual maintenance cost must be planned.

**Cost: \$1,250 per unit  
\$850 per unit**

**Interior Repairs**

Interior repairs are required on the 1993 units (5). The interior walls are to be repainted, with repair to drywall where necessary.

**Cost: \$4,500 per unit**

**Heating Systems**

There is a slight leak in the hot water heating systems in the 1993 (5) units. Replace with new hot water heating systems (manufacturer's guarantee has expired).

**Cost: \$900 per unit**

**Exterior Repairs**

Due to the location of units constructed in 1996 (5), there have been increasing problems with the freezing/swelling of the exterior steel screen doors and the entrance door has suffered from moisture damage. Replace rear door units with new screen door and solid core door.

**Cost: \$2,500 per unit**

**Emergency Repairs**

Based on an average cost of emergency and unplanned repairs during the past two years, a cost of \$500 per unit (for all 80 units) must be planned for emergency repairs.

**Cost: \$500 per unit**





## HANDOUT #24

**LITTLE CREEK FIRST NATION  
Required Repairs—Band-funded Portfolio**

YEAR THREE

**Band-funded Units**

Portfolio—80 units; 5 units built each year, from 1987 to 2002 inclusive

**Regular Maintenance:**

An annual regular maintenance cost of \$1,300 must be planned for the units that have not yet been brought up to minimum property standards, until the repairs have been complete. For the remaining units, a \$900 annual maintenance cost must be planned.

**Cost: \$1,300 per unit  
\$900 per unit**

**Interior Repairs:**

Interior repairs are required on the 1994 units (5). The interior walls are to be repainted, with repair to drywall where necessary.

**Cost: \$4,500 per unit**

**Exterior Repairs:**

Roof shingles to be replaced on the 1993 units (5).

**Cost: \$3,000 per unit**

**Emergency Repairs:**

Based on an average cost of emergency and unplanned repairs during the past two years, a cost of \$500 per unit (for all 80 units) must be planned for emergency repairs.

**Cost: \$500 per unit**





## HANDOUT #25

## LITTLE CREEK FIRST NATION Required Repairs—CMHC-funded Portfolio

YEAR ONE

### CMHC-funded Units

Portfolio—40 units; 10 units built in each of 1978, 1982, 1988 and 1993

### Regular Maintenance

An annual regular maintenance cost of \$1,000 **must** be planned for the 1978 units (10) that require major rehabilitation, until the major repairs are done. For all other units, an \$800 annual maintenance cost must be planned.

**Cost: \$1,000 per unit**  
**\$800 per unit**

### Interior Repairs

Interior repairs are required on the 1982 units (10). The current condition of the flooring is beyond repair and is a safety hazard for the occupants. Replace worn-out flooring (mix of carpet and linoleum) with resilient flooring.

**Cost: \$2,500 per unit**

### Heating Systems

Install new furnaces and chimneys in the 1978 units (10). The heating systems require constant repair (manufacturer went out of business) and the tenants complain of being cold during the winter. It is not cost-effective to continue repairing. Install new heating system and chimney.

**Cost: \$5,000 per unit**

### Exterior Repairs

In order to reduce operating costs, the 1978 units (10) will be rehabilitated from the exterior to include strapping; GlasClad® insulation and Tyvek® air barrier; new exterior doors and windows and new siding.

**Cost: \$15,000 per unit**

### Emergency Repairs

Based on an average cost of emergency and unplanned repairs during the past two years, a cost of \$300 per unit (for all 40 units) **must** be planned for emergency repairs.

**Cost: \$300 per unit**



**HANDOUT #26**
**LITTLE CREEK FIRST NATION  
Required Repairs—CMHC-funded Portfolio**
**YEAR TWO****CMHC-funded Units**

Portfolio—40 units; 10 units built in each of 1978, 1982, 1988 and 1993

**Regular Maintenance**

An annual regular maintenance cost of \$1,050 must be planned for any remaining 1978 units where the major repairs are not yet completed. For all other units, \$850 annual maintenance costs must be planned.

**Cost: \$1,050 per unit  
\$850 per unit**

**Interior Repairs**

Nil

**Heating Systems**

Replace the hot water heating system in the 1988 (10) units.

**Cost: \$900 per unit**

**Exterior Repairs**

Due to the location of units constructed in 1993 (10), there have been increasing problems with the freezing/swelling of the exterior steel screen doors and the entrance door has suffered from moisture damage. Replace both screen and entry doors.

**Cost: \$2,700 per unit**

**Emergency Repairs**

Based on an average cost of emergency and unplanned repairs during the past two years, a cost of \$300 per unit (for all 40 units) must be planned for emergency repairs.

**Cost: \$300 per unit**







## HANDOUT #27

**LITTLE CREEK FIRST NATION  
Required Repairs—CMHC-funded Portfolio**
**YEAR THREE**
**CMHC-funded Units**

Portfolio—40 units; 10 units built in each of 1978, 1982, 1988 and 1993

**Regular Maintenance**

An annual regular maintenance cost of \$850 must be planned.

**Cost: \$850 per unit**

**Interior Repairs**

Replace bathroom tub tile, caulk and seal for the 1993 units (10).

**Cost: \$1,500 per unit**

**Heating Systems**

Nil

**Exterior Repairs**

Roof shingles to be replaced on the 1988 units (10).

**Cost: \$3,000 per unit**

**Emergency Repairs**

Based on an average cost of emergency and unplanned repairs during the past two years, a cost of \$300 per unit (for all 40 units) must be planned for emergency repairs

**Cost: \$300 per unit**





## HANDOUT #28

### STEP 2—DEVELOPING THE PLAN

Using the information that you have gathered in Step 1, your team must now analyze this information and develop a three year maintenance plan. Please complete the following:

#### **Worksheets - Schedule of Costs for Maintenance and Repairs**

Band-funded portfolio; Handouts 29, 30 and 31

CMHC-funded portfolio; Handouts 32, 33 and 34

These will assist your team in identifying what work can be completed in each year, which work needs to be deferred to the following year, the costs associated with each item and the total cost of the planned work for each year.

#### **Important Notes:**

- Start by reviewing “Required repairs,” Handout #22 for Band-funded units and Handout #25 for CMHC-funded units”. Using a pencil, enter all of the required repairs on the worksheet. If all of the required repairs exceed the available budget (noted on the top left corner of the worksheet), then you must decide which items need to be deferred and carried forward and revise the worksheet. Be sure to note those items carried forward on the next year’s worksheet.
- You must follow the maintenance goals that have been provided.
- The budget amount shown includes **ALL** of the budget available for maintenance and repairs (e.g., includes RRAP, Replacement reserve funds, the 25 per cent of the INAC capital allocation, etc.). There are no additional funds available.
- You cannot exceed the budget amount for the year.
- You cannot defer or reduce regular maintenance or emergency repairs.
- The first line item has been completed on the first worksheet as an example of how the form can be completed.





**HANDOUT #29**

**Worksheet—Schedule of Maintenance and Repairs  
Band-funded Units**

<b>Year One</b>						
<b>Year One Budget = \$253,500</b>						
	<b>Year of Unit Construction</b>	<b>Cost per unit</b>	<b>Total # of Units</b>	<b>=</b>	<b>Total Cost</b>	<b>Deferrals</b>
Regular Maintenance	1990, 91, 92 1987, 88, 89, 93 & 1993 to 2002	@ \$1,200 @ \$800	15 65	= =	\$18,000 \$52,000	
Interior Repairs	1990	\$7,000	5		\$35,000	Deferred repairs for 1991 & 1992 units to Year 2 (\$70,000).
Heating System						
Exterior Repairs						
Emergency Repairs						
Other:						
<b>Total Cost</b>						

- (1) The Budget you must work within for this year, is noted at the top of this worksheet. **You cannot exceed the budget amount.**  
*Hint:* It is possible to complete the year's planning so that the total cost equals the budget amount.
- (2) Before making a decision to defer any repairs to the following year, review the Maintenance Goals to be sure your decision is in keeping with what you are expected to achieve with the Goals. Remember to make a note of items that are deferred.





**HANDOUT #30**

**Worksheet—Schedule of Maintenance and Repairs  
Band-funded Units**

**Year Two**

**Year Two Budget = \$274,000**

	Year of Unit Construction	Cost per unit	Total # of Units	=	Total Cost	Deferrals
Regular Maintenance				=		
Interior Repairs	1991 & 1993	\$7,000 \$4,500	5 5		\$35,000 \$22,500	Carried forward from Year 1. Again deferred 1992 units, to Year 3 (\$35,000).
Heating System						
Exterior Repairs						
Emergency Repairs						
Other _____						
<b>Total Cost</b>						

- (1) The Budget you must work within for this year, is noted at the top of this worksheet. **You cannot exceed the budget amount.**  
*Hint:* It is possible to complete the year's planning so that the total cost equals the budget amount.
- (2) Before making a decision to defer any repairs to the following year, review the Maintenance Goals to be sure your decision is in keeping with what you are expected to achieve with the Goals. Remember to make a note of items that are deferred.







**HANDOUT #31**

**Worksheet—Schedule of Maintenance and Repairs  
Band-funded Units**

**Year Three**

**Year Three Budget = \$274,000**

	Year of Unit Construction	Cost per unit	Total # of Units	=	Total Cost	Deferrals
Regular Maintenance				=		
Interior Repairs	1992	\$7,000	5		\$35,000	Carried forward from Year 2.
	1994	\$4,500	5		\$22,500	
Heating System						
Exterior Repairs						
Emergency Repairs						
Other _____						
<b>Total Cost</b>						

- (1) The Budget you must work within for this year, is noted at the top of this worksheet. **You cannot exceed the budget amount.**  
*Hint:* It is possible to complete the year's planning so that the total cost equals the budget amount.
- (2) Before making a decision to defer any repairs to the following year, review the Maintenance Goals to be sure your decision is in keeping with what you are expected to achieve with the Goals. Remember to make a note of items that are deferred.





**HANDOUT #32**

**Worksheet—Schedule of Maintenance and Repairs  
CMHC-funded Units**

Year One						
<b>Year One Budget = \$166,000</b>						
	Year of Unit Construction	Cost per unit	Total # of Units	=	Total Cost	Deferrals
Regular Maintenance	1978	\$1,000	10	=	\$10,000	
	1982, 88 & 93	\$800	30	=	\$24,000	
Interior Repairs						
Heating System						
Exterior Repairs						
Emergency Repairs						
Other _____						
<b>Total Cost</b>						

- (1) The Budget you must work within for this year, is noted at the top of this worksheet. **You cannot exceed the budget amount.**  
*Hint:* It is possible to complete the year's planning so that the total cost equals the budget amount.
- (2) Before making a decision to defer any repairs to the following year, review the Maintenance Goals to be sure your decision is in keeping with what you are expected to achieve with the Goals. Remember to make a note of items that are deferred.





**HANDOUT #33**

**Worksheet—Schedule of Maintenance and Repairs  
CMHC-funded Units**

Year Two						
<b>Year Two Budget = \$161,400</b>						
Year of Unit Construction	Cost per unit	Total # of Units	=	Total Cost	=	Deferrals
Regular Maintenance			=			
Interior Repairs			=			
Heating System			=			
Exterior Repairs						
Emergency Repairs						
Other _____						
<b>Total Cost</b>						

- (1) The Budget you must work within for this year, is noted at the top of this worksheet. **You cannot exceed the budget amount.**  
*Hint:* It is possible to complete the year's planning so that the total cost equals the budget amount.
- (2) Before making a decision to defer any repairs to the following year, review the Maintenance Goals to be sure your decision is in keeping with what you are expected to achieve with the Goals. Remember to make a note of items that are deferred.





**HANDOUT #34**

**Worksheet—Schedule of Maintenance and Repairs  
CMHC-funded Units**

**Year Three**

**Year Three Budget = \$118,000**

	Year of Unit Construction	Cost per unit	Total # of Units	=	Total Cost	Deferrals
Regular Maintenance				=		
Interior Repairs						
Heating System						
Exterior Repairs						
Emergency Repairs						
Other _____						
<b>Total Cost</b>						

- (1) The Budget you must work within for this year, is noted at the top of this worksheet. **You cannot exceed the budget amount.**  
*Hint:* It is possible to complete the year's planning so that the total cost equals the budget amount.
- (2) Before making a decision to defer any repairs to the following year, review the Maintenance Goals to be sure your decision is in keeping with what you are expected to achieve with the Goals. Remember to make a note of items that are deferred.







## HANDOUT #35

### STEP 3—APPROVAL OF THE PLAN

You are now joining the other half of the housing department team that has completed its portion of the maintenance plan. Working together, you will:

#### Part A

Prepare a Summary Report—Three-Year Maintenance Plan for both the CMHC- and Band-funded units.

#### Part B

Prepare a brief, five to 10 minute presentation for Chief and Council, to obtain approval of the Plan.

The presentation should include:

- The Summary Worksheet—Three-Year Maintenance Plan;
- Answers to the 5 Ws:
  - Why** is this plan necessary, how does it help the Band achieve it's goals?
  - What** will be completed over the next three years?
  - Where** will the staff resources come from?
  - Who** will be responsible for completing the task? and
  - When** will each function be completed by?
- Confirmation of the benefits of following the plan;
- An indication of how often the plan will be reviewed and how successes and necessary adjustments will be reported;
- A description of how you will communicate the approved plan to the Housing Committee, Band staff and Band members.

#### Part C

Nominate a member (or members) of the team to present the Plan to Chief and Council.





**HANDOUT #36**

**LITTLE CREEK FIRST NATION**

**Three-Year Maintenance Plan  
Summary Report—CMHC- and Band-funded Units**

	<b>Year One</b>	<b>Year Two</b>	<b>Year Three</b>	<b>TOTAL</b>
<b>Budget Allocation</b>	\$	\$	\$	\$
	<b>Year One</b>	<b>Year Two</b>	<b>Year Three</b>	<b>TOTAL</b>
<b>Maintenance Item</b>	Expenses	Expenses	Expenses	
Regular Maintenance				
Interior Repairs				
Heating Systems				
Exterior Repairs				
Emergency Repairs				
Other				
<b>TOTAL COSTS</b>	\$	\$	\$	\$





## HANDOUT #37

Date:

Letter to myself:

I, \_\_\_\_\_, agree to support the development and implementation of the financial or maintenance planning process.

Some of the things I will do to help are:

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Suggestions:

- offer support and guidance to those staff and housing committee members who are developing and implementing the planning process;
- support the use of a written planning process
- review and update financial/maintenance plans on a regular basis



# APPENDIX A

# FORMS









## SAMPLE – CMHC IN THE FUTURE

CMHC would like to get in touch with you in the future to talk about the long-term impact of the workshop and how we can continue to improve this workshop. We would appreciate you completing the information below.

<b>Name:</b>	
<b>Title:</b>	
<b>Community:</b>	
<b>Address:</b>	
<b>Telephone:</b>	
<b>Fax:</b>	
<b>E-mail:</b>	
<b>Workshop:</b>	
<b>Date:</b>	
<b>Location:</b>	
<b>Trainer's name:</b>	

# HOUSING QUALITY MATTERS

## Property Management Planning

### EVALUATION FORM

#### How did we do?

This is your chance to tell us what you think of the Housing Quality Matters Workshops. These Workshops are for you. We want to make them as useful to you as we can, so we need to know what you think of this Workshop — Did it help you? Can we do better? How? Answering the questions on this form will help CMHC design and present Workshops that will help you.

Workshop Location		Date
City	Province	Trainer's Name

#### 1. I am a ...

- Housing Manager
  Housing Staff
  First Nation Leadership  
 Other, please specify: \_\_\_\_\_

#### 2. Overall, I found this Workshop ...

- Not at all useful
  Not very useful
  More or less useful  
 Useful
  Very useful
  Does not apply

#### 3. How much did you know about the subject of the Workshop before attending the Workshop?

- Nothing
  A little
  Some  
 A lot
  Expert knowledge

#### 4. Now that you have finished the Workshop, how much do you feel you know about the subject?

- About the same
  A little more
  A lot more

#### 5. Please rate the following Workshop topics

*Determine goals, develop strategies, measure and evaluate goals*

- Not at all useful
  Not very useful
  More or less useful  
 Useful
  Very useful
  Does not apply

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**5. Please rate the following Workshop topics (Continued)**

***The four steps of the planning model***

- |  |  |  |
|--|--|--|
| <input type="checkbox"/> Not at all useful | <input type="checkbox"/> Not very useful | <input type="checkbox"/> More or less useful |
| <input type="checkbox"/> Useful            | <input type="checkbox"/> Very useful     | <input type="checkbox"/> Does not apply      |

***Types of maintenance***

- |  |  |  |
|--|--|--|
| <input type="checkbox"/> Not at all useful | <input type="checkbox"/> Not very useful | <input type="checkbox"/> More or less useful |
| <input type="checkbox"/> Useful            | <input type="checkbox"/> Very useful     | <input type="checkbox"/> Does not apply      |

***Maintenance planning process***

- |  |  |  |
|--|--|--|
| <input type="checkbox"/> Not at all useful | <input type="checkbox"/> Not very useful | <input type="checkbox"/> More or less useful |
| <input type="checkbox"/> Useful            | <input type="checkbox"/> Very useful     | <input type="checkbox"/> Does not apply      |

**6. The presentation and communication were ...**

- |   |   |   |
|---|---|---|
| <input type="checkbox"/> Not at all effective | <input type="checkbox"/> Not very effective | <input type="checkbox"/> More or less effective |
| <input type="checkbox"/> Effective            | <input type="checkbox"/> Very effective     | <input type="checkbox"/> Does not apply         |

**7. My questions and needs were dealt ...**

- |   |   |   |
|---|---|---|
| <input type="checkbox"/> Not at all effectively | <input type="checkbox"/> Not very effectively | <input type="checkbox"/> More or less effectively |
| <input type="checkbox"/> Effectively            | <input type="checkbox"/> Very effectively     | <input type="checkbox"/> Does not apply           |

**8. The Workshop material was clear and easy to follow ...**

- |   |   |   |
|---|---|---|
| <input type="checkbox"/> Not at all clear | <input type="checkbox"/> Not very clear | <input type="checkbox"/> More or less clear |
| <input type="checkbox"/> Clear            | <input type="checkbox"/> Very clear     | <input type="checkbox"/> Does not apply     |

**9. How likely are you to use what you learned in the Workshop?**

- |  |  |  |
|--|--|--|
| <input type="checkbox"/> Not at all likely | <input type="checkbox"/> Not very likely | <input type="checkbox"/> More or less likely |
| <input type="checkbox"/> Likely            | <input type="checkbox"/> Very likely     | <input type="checkbox"/> Does not apply      |

**10. What are the three most important things you learned in this Workshop?**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

**11. Based on what you have learned in this Workshop, tell us one thing you will change in your housing operations.**

**12. If you have any comments about this Workshop, please write them here.**