



FNHPA Toolkit

Strategic Planning Capacity – First Nation Housing



First Nations Housing
Professionals Association

L'Association des professionnels de
l'habitation des Premières Nations



This toolkit has been created to support FNHPA members by providing resource packages, tools, templates, and guidelines tailored to the needs of First Nations housing planning on-reserve. The toolbox operates as a centralized repository for tools and ready-to-use resources that align with the study benchmarks and recommendations outlined by the First Nations Housing Professionals Association (FNHPA).

Members are encouraged to utilize the resources provided, share insights, and propose additional solutions to help expand the toolkit further. This collaborative approach ensures the toolkit remains relevant and effective as a support system for housing professionals.

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INTRODUCTION:

HOW TO USE THE TOOLKIT

Included here are templates for planning your housing strategic planning and for hosting and facilitating the strategic planning process in your community. Each tool can be modified and edited as you need. You may find you have some of this information already as you talk to different departments within your organization. We encourage you to get other departments involved. Each tool has instructions on how they can be used, for your reference they are listed here also:

- Strategic Planning Checklist (Helps you to prepare and plan)
- Sample Agenda (How to organize your meeting)
- Community Housing Needs Assessment Template (Important information to gather for planning)
- Supporting Housing Business Model Template (A template to use during the planning meeting)
- Community Engagement Checklist (Planning tool)
- Communications Plan Template (How to communicate to your membership)
- Community Interview Template (How to gather community input)
- Strengths, Weaknesses, Opportunities, Threats (SWOT) Analysis Template (A template to use during the planning meeting)
- Strategic Plan Template (A template and format to lay out your strategic plan)

Forming a planning committee involving other departments and leadership will help you organize housing strategic planning for your community. Your housing team will also have valuable input.

We hope these tools will be useful in your planning journey!

EMPOWERING FIRST NATIONS HOUSING: RECOMMENDATIONS, TOOLKIT, AND ROADMAP FOR SUCCESS

This toolkit is an essential resource for FNHPA members and housing professionals, designed to enhance strategic planning capacity for on-reserve First Nations housing. The toolkit provides actionable guidance and fosters community-driven solutions by addressing First Nations communities' unique challenges and priorities. This ensures members have access to a structured pathway for effective housing planning. Each section aligns with the 2025 Study recommendations, empowering leadership and housing teams to establish resilient and innovative housing systems that reflect their long-term vision. This roadmap supports effective governance and strategic alignment, ensuring sustainable housing progress tailored to the needs

of each community. It serves as a dynamic resource to support leadership, housing teams, and stakeholders in shaping the future of on-reserve housing with innovation, strategy, and community-driven solutions.

The table on the following page outlines key benchmarks, supporting actions, recommendations, and toolkit components designed to strengthen First Nations housing governance, strategic planning, economic principles, and multi-sector collaboration. The main report also outlines additional tools recommended through the 2025 FNHPA study.



STRATEGIC PLANNING BENCHMARKS: YOUR FOUNDATION

BENCHMARK	SUPPORTING ACTIONS
<p>Good Governance Practices in Housing</p>	<ul style="list-style-type: none"> • Effective Housing policy, governance, and decision-making frameworks are accessible to all First Nations. • Provide education and awareness to First Nation Leadership and community teams regarding current effective governance and administration of housing programs, initiatives, and funding sources (FNHPA/INAC/CMHC). • Advocate for accountability and transparency supported by community-owned electronic data management.
<p>First Nation Economic Principles Applied to Housing</p>	<ul style="list-style-type: none"> • Offer resources and training to support the administration of housing as a business with enhanced communications technology and data collection (asset management, inventory control, funding business models and cost recovery) • Establish fair wage guidelines and advocacy for the continued development of certified FNHPA professionals.
<p>Strategic Planning for First Nations Housing</p>	<ul style="list-style-type: none"> • Education and resources for strategic planning frameworks, activities, and templates. • Provide training and support in community engagement and facilitation. • Invest in providing education, tools and resources for First Nations housing teams in proposal, policy and business development of housing.
<p>Multi-Sector Collaboration in Housing Needs Assessment</p>	<ul style="list-style-type: none"> • Education and awareness tools for organizational structuring and multi-sector collaboration • Provide capacity building in leadership and teamwork facilitation, creating energy for community participation in identifying housing needs and priorities.

RECOMMENDATIONS	WHAT IS IN THE TOOLKIT?
<p>Develop a 2-day Strategic Planning Workshop. To set the standard for housing on-reserve, promote leadership and collaboration, evidence-based planning, and alignment across the community.</p>	<p>Template: Sample Template for 2-Day Strategic Planning Workshop</p>
<p>Enhance Technology, Communications and Long-Term Data Collection. Introduce practical tools, resources, and related HR development (data entry training and job descriptions) for electronic data management to improve:</p> <ul style="list-style-type: none"> • Tracking housing operations and budgets for transparency. • Streamlining tenant maintenance records, rental and repair invoicing for cost recovery • Utilize housing data for evidence-based proposals for successful funding • Improve planning and self-determination in crisis and emergency management response • Support long-term capacity for housing teams and independent administration and operations 	<p>Template: Community Housing Needs Assessment</p> <p>Template: Supporting Housing Business Model</p>
<p>Develop a toolkit with practical, user-friendly resources to assist housing managers in planning and community engagement.</p>	<p>Checklist: Community Engagement</p> <p>Template: Communications Plan</p> <p>Template: Community Interview</p> <p>Template: SWOT Analysis</p> <p>Template: Strategic Action Plan</p>
<p>Develop engagement and facilitation support for gathering community input and establishing community priorities.</p> <ul style="list-style-type: none"> • Create adaptable frameworks, templates and tools for community needs assessments. • Showcase and highlight First Nation housing program transformations and innovations. • Share examples of different housing options, and new innovations. 	<p>In Practice: Showcasing Saddle Lake Cree Nation</p>

RECOMMENDATION 1:

GOOD GOVERNANCE PRACTICES IN HOUSING

This example workshop aims to serve as a cornerstone for Leadership awareness and support of housing managers, offering both strategic direction and tangible resources to inspire innovation and resilience. The goal is to encourage and support communities in improving their housing programs.

The Workshop Goals and suggested topics to customize the workshop for each community include:

PROMOTE LEADERSHIP INVOLVEMENT AND DEPARTMENT COLLABORATION

- Foster multidisciplinary teamwork amongst departments and innovative problem-solving in housing strategies.
- Encourage connections with FNHPA resources and community members to drive collective progress.

ENCOURAGE EVIDENCE-BASED PLANNING

- Provide practical insights into trends, effective practices, and strategies in First Nations Housing.
- Emphasize using data-driven approaches to improve housing program and policy development.

SET STANDARDS AND FOSTER ALIGNMENT

- Help establish clear standards and benchmarks to guide community leaders and housing departments.
- Create a unified understanding of goals aligned with FNHPA mandates and community needs.



2-DAY COMMUNITY WORKSHOP

WORKSHOP OBJECTIVES EXAMPLE

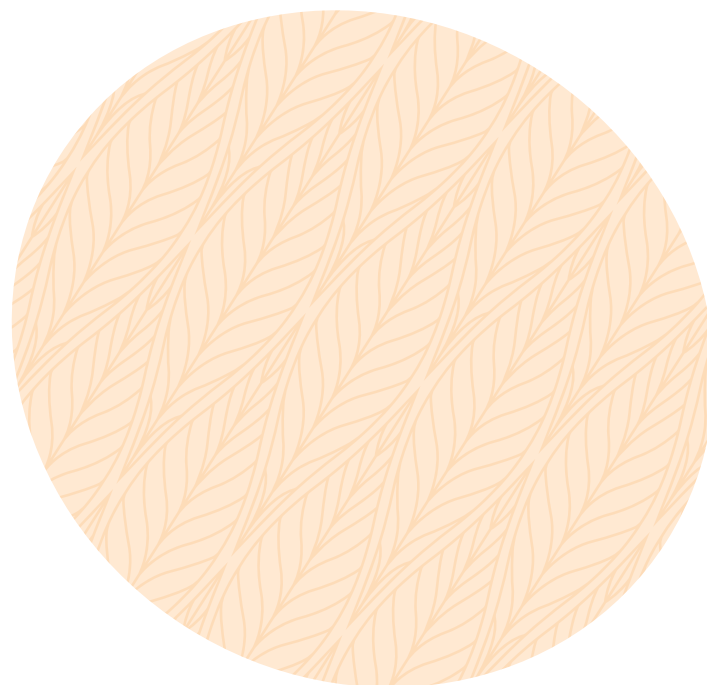
Objective 1: Housing staff will develop their planning capacity and leadership to improve alignment on housing challenges and develop creative solutions.

Objective 2: Provides Chief and Council with the knowledge and strategies to strengthen and support housing policies, practices, and collaboration within the community.

SUGGESTED TOPICS TO PRIORITIZE AND CUSTOMIZE BASED ON COMMUNITY NEED

Programs, Tools and Resources

- Role of Housing Managers
- Understanding Housing Funding
- Understanding the Continuum of Housing
- Education on Housing Programs
- Investing in Housing Staff Capacity
- Decolonizing Funding and Programs to Meet Cultural Needs
- Improving Data and Reporting Practices
- Breaking Down Silos for Team Work Amongst Portfolios and Departments



2-DAY STRATEGIC PLANNING WORKSHOP

2-day strategic planning workshop planning considerations and check-list.

COMPONENT	PLANNING CONSIDERATIONS AND INSIGHTS
<p>Who Should Attend:</p>	<p>Consider the following:</p> <ul style="list-style-type: none"> • Chief and Council across all portfolios • Housing Team • Directors of programs who support community economic development, social and health services, and other on-reserve leaders • Community Knowledge keepers/translators/protocol facilitators • An advisory committee (representatives of various community interests and groups such as Elders, Youth, LGBTQ2+)
<p>Level of Leadership Commitment</p>	<p>Determine how committed your leadership is to advancing housing initiatives on-reserve:</p> <ul style="list-style-type: none"> • Partnership: The Chief and Council fully commit to the time and resources for a two-day session, prioritizing housing governance, accountability, and capacity building for on-reserve housing. • Collaborative: The Chief and Council agree that attending a two-day workshop with housing staff will help them learn and facilitate improved housing programming. • Informed: The Chief and Council agree to stay informed as they advance other priorities in their portfolio
<p>Secure Budget</p>	<p>The budget will vary based on leadership commitment and attendee participation.</p> <ul style="list-style-type: none"> • A full leadership commitment to building stronger housing capacity and strategic planning may justify a higher budget for an off-site retreat. • Early-stage awareness building and planning could benefit from a modest budget with the aim of additional future workshops. <p>Budget/resource considerations:</p> <ul style="list-style-type: none"> • Accommodations/travel • FNHPA and other expert facilitators/presenters • Opening/closing protocols • Materials/printing • Meals/Catering • Space rental • Set-up/take-down/cleaning • AV equipment/hookup • hybrid connections – hire a support to handle the computer/IT • Webinar recording for future sharing with others
<p>Logistics</p>	<p>Decide and communicate to all participants: dates, times, and location for the session.</p> <ul style="list-style-type: none"> • If hosting off-reserve retreat: at least one month in advance, you should secure a hotel and send Outlook/calendar invites to hold the date • If on-reserve decide and book the time with potential plan B dates secured in advance.

COMPONENT	PLANNING CONSIDERATIONS AND INSIGHTS
Invitation:	<p>Draft and distribute an invitation to all identified attendees. Consider if any of the following details are helpful to include:</p> <ul style="list-style-type: none"> • Name/purpose of workshop • Facilitator/Host of Meeting • Dates and times for each day • Location • Accommodations (if needed) • Meals provided • RSVP and/or Registration • Any Incentives or details around work time off to attend/time-in-lieu/compensation/gifts/door prizes <p>Plan to send invitations via email a minimum of two weeks in advance</p> <ul style="list-style-type: none"> • Follow-up reminders with printed invitation posters are useful • Send a reminder with the schedule included two days before • Provide individual one-on-one calls/texts/connections to confirm any invitations not rsvp'd • Be sure to include housing team members
Planning Workshop Materials	<p>Consider the following:</p> <ul style="list-style-type: none"> • Workshop Schedule (print and for projecting onto screen) • Opening Protocols and related materials/preparations • Powerpoint Presentation (print and for projecting onto screen) • Community Presentations • Group Discussion activities (materials may include poster paper, flip chart markers, post-it cards, sticker dots, printed group questions and activity worksheets) • Icebreakers and wellness breaks • Meals • Meeting note template • Feedback forms • Closing

SAMPLE TEMPLATE FOR 2-DAY STRATEGIC PLANNING WORKSHOP:

Date, Time and Location

TIME	DAY 1: DATE	DAY 2: DATE
8:30-9:00 a.m.	Breakfast/Registration	Breakfast/Sign-in
9:00-9:30 a.m.	Opening Protocol	<ul style="list-style-type: none"> • Check-in: Report Back on Day 1 • Overview of Day 2
9:30 – 10:00 a.m.	<ul style="list-style-type: none"> • Introduction of Facilitation team • Overview of 2 days 	<ul style="list-style-type: none"> • Introducing Evidence-based Planning in Housing: The Housing Continuum Placemat • FNHPA Standards and Community Alignment
10:00-10:15 a.m.	WELLNESS BREAK	WELLNESS BREAK
10:15-12:00 p.m.	History and Approach <ul style="list-style-type: none"> • Mandate and Strategic Direction • Overview of Team, Resources, and timeline, planning checklist 	Breakout discussion: Supporting Housing Business model
12:00-1:00 p.m.	LUNCH	LUNCH
1:00-1:15 p.m.	Icebreaker	Icebreaker
1:15 to 2:15 p.m.	Breakout discussion: <ul style="list-style-type: none"> • Hopes and Fears • Community Direction 	Breakout discussion: Governance, Accountability and Transparency-communication planning
2:15 to 2:30 p.m.	BREAK	BREAK
2:30 to 3:45 p.m.	Reporting of community needs assessment reporting	Priority Setting for Housing Collaboration: Strategic Planning template
3:45 to 4:00 p.m.	Feedback	Action Plan and Next Steps
4:00 p.m.	Wrap-Up for the Day	Closing

NOTES

RECOMMENDATION 2: FIRST NATION ECONOMIC PRINCIPLES APPLIED TO HOUSING

The following are considerations for enhancing on-reserve technology and building consistency in long-term data collection.

FOCUS AREAS FOR DATA COLLECTION

- Housing stock, operations, and maintenance records.
- Tenant repairs and renovation tracking to optimize resource allocation.
- Labour, contracts, and HR tracking to ensure workforce efficiency.
- Purchasing and inventory control management for streamlined operations.
- Budgets and accounting for transparent financial oversight.

DEVELOPMENT OF PRACTICAL TEMPLATES

- Create easy-to-use tools to help housing managers effectively assess and track key metrics.
- Review resources provided in the FNHPA Housing Management Assessment Tool to ensure consistency and reliability in data collection.

INNOVATING A BUSINESS CANVAS MODEL APPROACH FOR HOUSING PLANNING

- Integrate planning tools that explore housing through a canvas model approach for visual impact with visual learners
- Encourage a sustainable and innovative perspective on housing management and development. Develop planning tools to address housing needs across a spectrum, from temporary accommodations to permanent solutions.
- Ensure resources are designed to accommodate diverse stages of housing development and community requirements.



COMMUNITY HOUSING NEEDS ASSESSMENT

Welcome to the First Nations Housing Professional Association Community Housing Needs Assessment Template! The purpose of needs assessments are to help with community housing strategic planning exercises by being a tool to gather information to inform our planning.

HOW A COMMUNITY HOUSING NEEDS ASSESSMENT CAN HELP

- The needs assessment template can assist in gathering information from community members for your future housing plans and strategies.
- Knowledge is power and the more you know about your community housing needs, the better you will be able to plan.
- Every community member can be an active participant in meeting the community housing need by providing input into community planning. The more community input you have, the easier it is to plan and to communicate your need.
- Needs assessment development can provide you with the opportunity to work with other community departments to gather information such as demographic information.
- Collaborative planning can include involving your housing department staff, other departments and community leadership.

THROUGH THE COMMUNITY HOUSING NEEDS ASSESSMENT YOU CAN

- Gather information for planning, budgeting and policy making
- Determine what community members need with their direct input
- Provide the knowledge to management, leadership and funders to make informed decisions about your housing infrastructure and securing future resources

WAYS YOU CAN GATHER COMMUNITY MEMBER INPUT

- Host a department drop-in
- Issue a community survey in the newsletter, on the website, in all community buildings
- Enter completed survey names into a draw
- Host a community strategic planning session
- Go door to door with surveys
- Host an online zoom meeting with off-reserve members seeking housing
- Meet with high school students about their current housing needs and future housing goals
- Meet with school age students about their housing wishes and needs
- Collaborate with other departments to gather information they may have already collected
- You can bring in a community facilitator to coordinate this planning exercise or designate a team member to be the project leader
- Form a housing strategic planning committee to plan and guide the strategic planning work

You can work with the membership department, communications department, health department to gather population information for your on-reserve membership. The following are types of information you will want to gather on a regular basis (i.e. every 3-5 years)

NEEDS ASSESSMENT TEMPLATE

Here is a needs assessment template for community information that should be gathered. This can include contacting other departments for their available information, reviewing reports and work plans and gathering available information yourself.

CURRENT COMMUNITY DEMOGRAPHICS

POPULATION INFORMATION

On-reserve population size: _____

Data source: _____

Date (m/d/y): _____

Off-reserve population size: _____

Data Source: _____

Date (m/d/y): _____

POPULATION PROJECTIONS

(Population Projection X Pure Growth Projection / 2 = Average anticipated population on-reserve)

5-year population increase: _____

10-year population increase: _____

15-year population increase: _____

20-year population increase: _____

AGE OF COMMUNITY POPULATION (ON-RESERVE)

Infants, children, minors (Ages 0-18): _____

Youth age (19-29): _____

Adult age (30-64): _____

Senior/Elder age (65+): _____

Long Term care age (80+): _____

GENDER

On-reserve Male population: _____

On-reserve Female population: _____

FAMILY SIZE

Single: _____

Couples: _____

Family with children (less than 2): _____

Family with children (more than 2): _____

Family with extended family (more than 4): _____

CURRENT STATE OF COMMUNITY POPULATION

AGING POPULATION

Number of members over 65+ in single-detached houses: _____

Number of Elders residence units in community: _____

Number of senior/disability renovations to existing housing per year: _____

Number of long-term care beds within 50KM vicinity: _____

YOUTH POPULATION

Number of transitional housing for youth aging out of care: _____

Transitional housing for young adults with special needs: _____

Number of units for unhoused people: _____

MENTAL HEALTH AND ADDICTIONS

Number of 1 bedroom homes/apartments for singles:

Number of temporary units for short-stays/emergencies:

Number of units with assisted living support for Mental health & addictions:

EMPLOYMENT OPPORTUNITIES

Total number of jobs available in community: _____

Economic sectors with jobs available within 50KM:

Number of members who commute off-reserve for employment:

CURRENT STATE OF HOUSING

HOUSING TYPE

Total Number of household dwellings: _____

Total Number of band-owned homes: _____

Total Number of CMHC houses: _____

Total Number of homeowner owned homes: _____

Total Number of rentals: _____

Single-detached homes: _____

Duplexes: _____

Triplexes: _____

Movable/modular: _____

Apartments: _____

Average number of people per household: _____

HOUSING CONDITIONS

Housing meets good condition standards: _____

Housing with renovations underway: _____

Housing with major repairs needed: _____

Condemned with occupants: _____

Condemned, empty: _____

Average homeowner spending: _____

Total Number of units over 10 years: _____

Total Number of units over 25 years: _____

Total Number of units over 50 years: _____

SALARY & EMPLOYMENT LEVELS

Average income of community tenants: _____

Number of tenants on income assistance programs:

Number of tenants in good standing with rental payments:

Number of tenants with house/ rental insurance:

Number of tenants who are First Nation employees:

What are members willing to spend on rent:

Number of homeowners with mortgage housing:

What are members willing to spend on a mortgage:

DATA COLLECTION AND ACCOUNTABILITY

To support members with data collection and accountability, FNHPA is currently prioritizing the development of its Learning Management Software and a plan to enhance data sovereignty and data utilization, making it accessible to all First Nations housing projects..

WHY IS DATA MANAGEMENT AND TECHNOLOGY SO IMPORTANT FOR FIRST NATIONS HOUSING PROGRAMS?

- Enhanced housing data management within First Nations communities has a transformative impact. By addressing the need for digital data, hardware, software, communication technology, local expertise, and standards and processes, communities can build and maintain comprehensive housing information systems. This advancement can unlock the following benefits:
 - **Improved Reporting:** Establishing streamlined and centralized systems can close data gaps, ensuring accurate and reliable reporting.
 - **Accurate Assessments:** Integrated housing and asset information can help communities better evaluate the state of infrastructure and housing conditions.
 - **Financial Planning:** Access to complete and dependable data enables better management of existing housing stocks and strategic planning for financial sustainability.
 - **Informed Investments:** Reliable data supports decision-making regarding housing and infrastructure investments.
 - **Land Use and Property Management:** Enhanced data systems provide a foundation for initiatives in land use and property management.
 - **Community Needs:** Centralized information allows for better reporting on housing and infrastructure conditions, supporting targeted community development.
 - **Economic Development Opportunities:** Effective housing data systems pave the way for identifying and implementing potential economic initiatives.

Data management infrastructure, training and implementation is a key component for First Nations to move towards self-sufficiency and proactive community engagement, strengthening housing programs and infrastructure outcomes.



SUPPORTING HOUSING BUSINESS MODEL

KEY PARTNERS & RIGHTS HOLDERS

KEY ACTIVITIES

HOUSING INITIATIVES

What issues are we helping to solve?

KEY RESOURCES

CHANNELS

MEMBER RELATIONSHIPS

What types of messages will we build with the member population?

VALUE

What do your members want to get out of this?

COST STRUCTURE

OWN SOURCE REVENUE

REVENUE

RECOMMENDATION 3:

STRATEGIC PLANNING FOR FIRST NATIONS HOUSING

The following provides guidance on strategic planning tools to build capacity for prioritizing housing with community engagement.

STRATEGIC PLANNING TOOLS

- Engaging Governance: Provide frameworks that challenge the status quo in decision-making around housing on reserves.
- Checklists and Goal Setting tools: Equip housing managers with practical strategies to reimagine and plan housing that meets evolving community needs.
- Develop easy-to-use templates to guide housing managers through creating strategic plans.
- Ensure templates are adaptable to varying community sizes, priorities, and capacities.

RECOMMENDATION 4:

MULTI-SECTOR COLLABORATION IN HOUSING NEEDS ASSESSMENT

When it comes to housing initiatives on-reserve, housing, health, and well-being are all interconnected. Therefore, it is important to create adaptable frameworks, templates, and tools for community needs assessments.

Consider developing engagement and facilitation support to gather community input and establish community priorities. Tools for Strategic planning community engagement can also be applied to needs assessment.

Encourage the community to start envisioning better housing on-reserve. Share examples of different housing options and new innovations. By emphasizing data-driven approaches in action and communities with similar size and resources, this recommendation aims to support a ripple effect in thinking of possibilities and acting within the existing capacity of members.

Showcase and highlight First Nation housing program transformations and innovations.

COMMUNITY NEEDS ASSESSMENT TOOLS

- Create templates to streamline the process of assessing community housing needs.
- Use these tools to inform housing priorities and align strategies with actual demand.

COMMUNITY ENGAGEMENT CHECKLIST

Welcome to the First Nations Housing Professionals Association Strategic Planning Session Template! Here is a checklist for your housing strategic planning session:

STRATEGIC PLANNING SESSION POSTER, INVITATION AND LOGISTICS

- Complete your housing needs assessment before scheduling the strategic planning session
- Set a date for your housing strategic planning session
- Organizing a facilitator (can be staff, leadership, community resource, Elder etc.)
- Offer tobacco to an Elder for an opening prayer
- Create a Housing strategic planning session event poster
- Create an Information sheet on the Strategic Planning Session (can accompany personal/house-to-house invitations or be distributed in the community)
- Plan to offer a meal to attract community members
- An added incentive is offering a door prize for participants who attend the session right to the end

STRATEGIC PLANNING SESSION AGENDA

- Opening Prayer
- Welcome remarks
- Presentation of Needs Assessment information
- Map of existing housing and future housing areas
- Community Input: (using sticky notes, place questions on the wall with key questions)
- What do you like about housing in our community?

- What are the biggest challenges with housing in our community?
- What type of housing is most needed to meet the current demand of our community?
- What should be done to best help our members with their housing needs?

(As an alternative: you include these survey questions in a survey they can complete while attending the session)

FOR FOLLOW UP AFTER THE STRATEGIC PLANNING SESSION

- Communicate how community members will see their input used (i.e. public report/infographic/pamphlet/poster, community media)
- Analyze the community session results and report to decision makers:
- Use the input for key priorities
- Share key themes back with the community
- Find ways to keep different groups across the community engaged
- Check back in to communicate back the results with community members and facilitate a discussion

COMMUNICATIONS PLAN

Communications plans are an important part of strategic planning for First Nations. A communications plan requires you to have assembled information, processed feedback from the last meeting or engagement effort, and prepared new questions and tools for engagement – all of which means that community outreach drives the strategic planning tasks.

PROCESS

1. Good strategic planning involves community members. The more your community feels their input is being heard and their direction is being followed, the more engaged and positive they will feel about being a community member.
2. Create a timeline for your planning process and share the timeline.
3. Make a community calendar. Make a month-to-month calendar of the upcoming year and write in all of the planned community meetings, events, and programs.

This worksheet helps you to inventory what elements are already in place in your community that will help with your outreach efforts and the individuals and groups that they will reach. think of any gaps that may need to be addressed.



COMMUNICATIONS PLAN TEMPLATE

ELEMENT	HAVE / DON'T HAVE / WILL CREATE	CRITICAL DATES	WHO WILL THIS REACH?
<p>Newsletter</p> <p><i>Do you have a community newsletter that you can share information and updates in?</i></p>			
<p>Website</p> <p><i>Do you have a community website you can post updates on?</i></p>			
<p>Facebook</p> <p><i>Do you have a community Facebook page you can post updates on?</i></p>			
<p>Other Social Media</p> <p><i>Do you have other community social media accounts you can post on?</i></p>			
<p>Online Survey</p> <p><i>Do you use online surveys for community feedback?</i></p>			
<p>Member Contact List (Database)</p> <p><i>Can you send mail outs to your membership?</i></p>			
<p>Annual General Meeting</p> <p><i>Do you host meetings where you can present the strategy?</i></p>			

COMMUNITY INTERVIEW TEMPLATE

PERSONAL INFORMATION

Name: _____ Age: _____ Gender: _____

Physical Address: _____

_____ Date: _____

Please check one below:

Community Member Community Member Spouse Other relative of community member

INTERVIEW QUESTIONS

What do you like about the community housing?

What are you proud of when it comes to the community housing?

What are you most worried about with community housing and community members?

What do you think is working well with the community housing?

Is there something the housing department can do to improve their relationship with you?

If you had two wishes to make our community better what would they be?

SWOT ANALYSIS

(STRENGTHS, WEAKNESSES, OPPORTUNITIES AND THREATS)

STRENGTHS

What is good about our community housing?

What is our housing department doing well?



AREAS TO IMPROVE (WEAKNESSES)

What needs to change in housing?

What should our housing department focus on?



OPPORTUNITIES

What opportunities exist for our community housing?



CHALLENGES (THREATS)

What could impact our community housing?

What is happening with our community housing that is concerning?



STRATEGIC PLAN TEMPLATE

OBJECTIVE	ACTION ITEM	PRIORITY	LEAD	TIMELINE	RESOURCES NEEDED
1. 1 Example: We will build senior housing.	1.1. Example: Survey senior housing requirements.	Review senior aged demographics in the membership.	Membership clerk, Housing Director, Health Director	2 weeks	Membership list, online survey, paper survey
1.2	1.2.1				
1.3	1.3.1				
1.4	1.4.1				

OBJECTIVE	ACTION ITEM	PRIORITY	LEAD	TIMELINE	RESOURCES NEEDED
2.1	2.1.1				
2.2	1.2.1				
2.3	2.3.1				
2.4	2.4.1				

NOTES

IN PRACTICE - SADDLE LAKE CREE NATION

Saddle Lake Cree Nation is located in the Amiskwaciyiniwak (Beaver Hills) region of central Alberta, Canada, and is a signatory to Treaty 6.

In total, there are 11,285 registered members, with 6,757 living on reserve.

The housing department has organized itself under the Director of Public Works to achieve its vision through a one-step-at-a-time approach to growth and capacity building.

WHAT HAS SADDLE LAKE PLANNED AND IMPLEMENTED DIFFERENTLY THAT HAS WORKED?

The team has achieved success in retaining its senior members long-term and is currently building the capacity of the younger generation by offering training and entrusting them to introduce new software and technology for data management.

HERE IS WHAT THE SADDLE LAKE TEAM THINKS MAKES A DIFFERENCE:

1. Director of Public Works facilitates a Capital Planning 2-day workshop every year with all band department executives and leadership. Each department is responsible for submitting their budget and year end and next years priorities before the workshop.
2. Maximizing the Use of the Louis Toolkit software application: Learning and teaching all Staff how to insert data across all indicators supported by this data management program. The Saddle lake team can pull up comprehensive and quick print reports re:
 - a. Housing assets
 - b. O and M to do lists – re: inspections and work orders
 - c. Accounting: monthly, quarterly and yearly financial planning, tracking, invoicing and client (tenant)/vendor (services/contractors) portfolios
 - d. Expenses by category, assets by issue/ location, task lists for upgrades/repairs/ maintenance, labour hours(HR) and inventory control of parts/materials,
 - e. Paying expenses – contracts and cheque requisition
 - f. Invoicing – creation, printing, emailing and receiving payments



- g. Housing inventory – GIS mapping
 - h. Housing Applications (waitlist, editing, check-list, accepting and rejecting)
3. 40 Acre Development – engaging community and creating ripple effect of energy. Not all phases are funded, but each step appears to be financed as it progresses through the process. The Community engagement and sharing of where they are at and what their next steps are creates a ripple effect of interest and linkages to opportunities.
 4. Bi-weekly sit downs with Chiefs and Council to review housing tenant issues, and situations that need leadership decision-making. This has become a source of trust and collaboration that ensures housing has the agency to move things forward.

40 ACRE

SUBDIVISION CONSTRUCTION

The following is a projected project timeline. Not all funding has been confirmed, as such the timelines is subject to change.

Bold Text = Confirmed Funding
Italic Text = Unconfirmed Funding



GLOSSARY

Activity

An element of work performed during the course of a project. An activity normally has an expected duration, expected cost and expected resource requirements. Activities are often subdivided tasks.

Asset Management

In housing, asset management is the systematic process of looking after properties, so they stay livable and financially sustainable.

Benchmarks

Reference points or standards that help an organization measure its performance, progress, and competitiveness.

Budget

An estimate of the expenditures expected to be incurred in the performance of a proposed statement of work or the financial plan or cost assessment for a grant proposal or contract. The budget represents all costs associated with the implementation of a grant project or contracted agreement.

Centralized

To be concentrated in one main point or a small group, rather than being spread out.

Chief and Council

Band representatives that are usually involved in the initial planning and decision making for a project. They have a strong interest in ensuring the project is successful because they are accountable to their community for it. They may be involved in selecting a site, arranging funding, or determining the construction management method that will be used, for example.

Communications Plan

A working plan that determines the information and communications needs of the project.

GLOSSARY

Contract

A voluntary and deliberate agreement between two or more persons to create a legal obligation which can be enforced in a court of law. Under the contract, the parties must perform their prospective duties, responsibilities and obligations as prescribed in the contract documents. The Contract supersedes all prior negotiations, representations or agreements, either written or oral, including the bidding documents. The Contract may be amended only as provided for in the General Conditions of the Contract.

Contractors

Contractors are firms or sole proprietors hired to carry out all or a portion of the construction work on a project. These firms work on the basis of an agreement (e.g. a contract) which specifically details what the contractor will do in return for an agreed upon amount of money.

Cost Recovery

The practice of collecting rent or fees to recoup expenses incurred in providing services or operating programs.

Data

Specific information or facts that are collected. A data item is usually a discrete or single measure. Examples of data items might include age, date of entry into program, or reading level. Sources of data may include case records, attendance records, referrals, assessments, interviews, and the like.

Database

An accumulation of information that has been systematically organized for easy access and analysis. Databases typically are computerized.

Feedback

A customer's opinion of their experience with your company and how you could improve.

GLOSSARY

Financial Planning

Financial planning is a comprehensive, ongoing process that maps out your current and future financial goals.

Focus Areas

The priority topics in which you concentrate your time, effort, and resources on.

Funding Business Models

The plan for how the department gets the funding it needs to operate and sustain itself.

Guidelines

The document that outlines program goals to be addressed in a proposal and provides specific instructions on what content to include in a proposal the format it should take and the funding criteria.

Inventory Control

The process of monitoring, organizing, and managing items in the inventory. This is done to save money, avoid any shortages of items and to keep things running smoothly.

Maintenance

Specific tasks that are done on a routine basis, usually performed to prolong the life of the home. Good maintenance practices can reduce the need for costly repairs.

Need

A need is something that is required, such as housing, heat, food, and clothing.

Objective

A specific statement that explains how a program goal will be accomplished. For example, an objective of the goal to improve adult literacy could be to provide tutoring to participants on a weekly basis for 6 months. An objective is stated so that changes, in this case, an increase in a specific type of knowledge, can be measured and analyzed. Objectives are written using measurable terms and are time limited.

GLOSSARY

Policy

A course or principle of action adopted or proposed by a government, party, business, or individual. It should be the policy of the Chief and Council to review and resolve contract disputes in a speedy and fair manner. This is particularly important because prolonged disputes can delay the completion of the work as defined in the contract as well as the payment to the contractor.

Strategic Planning

Strategic planning offers a systematic means of analyzing the prospects for your organization and helps in charting a long-term course of action.

Tenant

A tenant is a person who lives in a property provided by the band.

Timeline

A schematic or description of the goals, benchmarks and activities within a specified time set for reaching completion. Timelines may also include persons responsible and measurable outcomes or products.