Evaluation Report: Second Short Course in Social Housing Management

by Claudia Engel
1977

The Institute of Urban Studies

THE UNIVERSITY OF WINNIPEG

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EVALUATION REPORT: SECOND SHORT COURSE IN SOCIAL HOUSING MANAGEMENT
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EVALUATION REPORT

SECOND SHORT COURSE IN SOCIAL HOUSING MANAGEMENT

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COURSE CO-ORDINATOR: Christine McKee

CORE COURSE: University of Winnipeg
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MODULES: Brandon University
September 19th - 23rd, 1977

University of Winnipeg
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PREFACE AND
GENERAL RECOMMENDATIONS

1. PREFACE

The following report provides an assessment and evaluation of the second course for social housing managers offered by the Institute of Urban Studies in conjunction with the Department of Continuing Education, University of Winnipeg. It also offers some suggestions and recommendations about the future direction of social housing management training in Canada and particularly in Manitoba.

As was the case last year, student selection and planning for the 1977 course was undertaken in conjunction with a local Advisory Committee which provided valuable assistance during the early stages of preparation for course delivery. The course was organized and delivered by a core team of four I.U.S. staff with assistance from some visiting instructors. The team included Gene Milgram, Tom McCormack, assistant co-ordinator, administration, Claudia Engel, assistant co-ordinator, curriculum development and co-ordinator of the rural module and Christine McKee, Course Co-ordinator.

The course was sponsored and financially supported by Central Mortgage and Housing Corporation. The assistance of George Devine and Campbell McCallum, Central Office, and Ron Reader, Winnipeg branch, were greatly appreciated in shaping curriculum development and course organization.

The following general recommendations are based on the experience of I.U.S, consultations with other trainers and C.M.H.C. staff. They relate to planning for future delivery of social housing management training in Canada and Manitoba.

2. GENERAL RECOMMENDATIONS

a. Training for managers of social housing should be offered on a regular ongoing basis by institutions with experience in adult education and knowledge of housing issues.

b. The role of social housing managers should be more clearly defined in terms of job responsibilities and code of practice. Central Mortgage and Housing Corporation, the provincial housing corporations, as well as institutions like I.U.S. responsible for training courses and the managers themselves have different expectations with regard to the training of qualified social housing managers. Anomalies associated with role expectations must be clarified.

c. Trainers who have been involved with the process of curriculum development should be involved in developing an integrated national delivery system in conjunction with C.M.H.C., provincial housing authorities and other relevant organizations, based on an agreed code of practice, standardized curriculum content and a uniform system of delivery.

d. It should be recognized in devising a national delivery system of training that social housing environments are extremely diversified. Delivery models should be devised which respond both to the needs of the urban manager with a large portfolio of units and the small part-time rural manager with only a few units.

e. Because of this diversity, it is recommended that a modular system be developed which could provide a recognizable qualification at different levels for different types of managers. An explanation and diagram of a possible delivery model is outlined in Appendix I.

f. Long term planning in the Manitoba situation will obviously have to await C.M.H.C.'s curriculum review. However, the modular delivery system for future housing management training suggested in Appendix I could quickly be implemented in the Winnipeg situation. In the short term, it is likely that there would be a strong demand for a further short course to serve the needs of rural managers in southwest and northern Manitoba where more than 70 housing authorities are responsible for public housing.

Christine McKee
Course Co-ordinator

INTRODUCTION

During 1977 the Institute of Urban Studies in co-operation with the Department of Continuing Education at the University of Winnipeg offered for a second time a training course for managers of social housing in Manitoba. This course represents a refinement and further development of the first course offered a year earlier. Both training programs are part of government recognition that efficient and responsible management of social housing is a necessity.

1. OBJECTIVES OF COURSE

The Evaluation Report for the 1976 course recommended that a second course be offered to further refine and consolidate curriculum developed for training social housing managers. The first course was offered in four segments, one five days and three four days in length with one week separating each segment. Instructors were drawn from I.U.S. staff and local resource persons. Registration was open to anyone managing social housing or working in an associated field in the city of Winnipeg. For a more detailed discussion of the considerations which underlie the basic course design, reference should be made to the Evaluation Report for the first course.[1]

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1. Christine McKee, Evaluation Report Social Housing Management Course (Winnipeg: Institute of Urban Studies University of Winnipeg, 1976), pp. 5-9.

Many of the alterations recommended by the first course evaluation were implemented as part of the second course. Specifically, these include:

ALTERNATE STRUCTURE
The course was offered in two component parts, the first dealing with the basic skill areas and the second with the more concrete aspects of housing management.

OPTIONAL CHOICES
Previous evaluation had suggested that some choices between specific subjects be offered, e.g. characteristics of elderly tenants versus family housing. This was implemented.

INTEGRATING COURSE CONTENT
The second course was offered by a small I.U.S. based team of instructors with some outside assistance. This was in line with the objective to strengthen and develop the delivery system for social housing management training in Manitoba and avoided the inevitable fragmentation that occurred during the first course when many instructors were used.

EXPLORE NEEDS OF RURAL MANAGERS
The first course dealt exclusively with the urban housing environments. A declared objective of the second course was to explore the needs of rural managers. Applications from rural managers were given priority for the second course.

Although not specifically recommended during the evaluation process, the decision was made to prepare a Handbook for course participants. Its purpose was to include much of the detailed factual information that could not be adequately handled in a classroom situation due to constraints on time and individual needs and interests.

Based on the initial experience, the 1977 course was reorganized, the staff consolidated to fewer key people, the course content diversified to a limited extent and the Handbook for Social Housing Managers written. A week-long core course was offered in May to twenty participants. In September a 5-day module for rural managers was held in Brandon and in October an urban equivalent was offered to managers in Winnipeg.

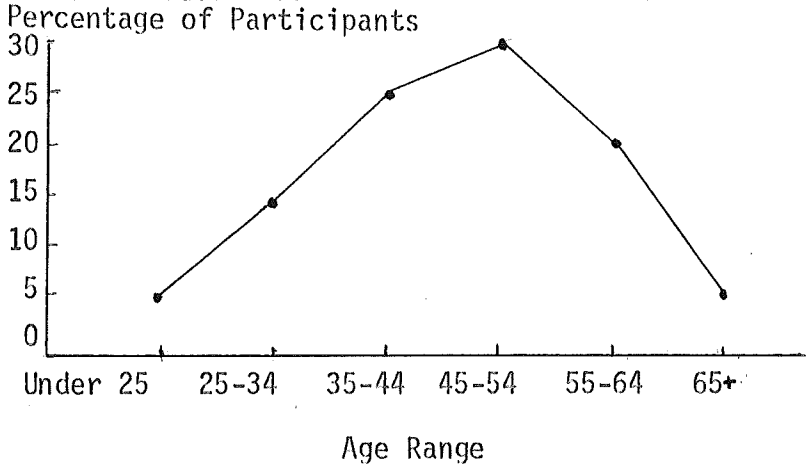
(Schedules for each found in Appendix II) During the intervening months, managers were required to complete a project analysis paper which focused on each managers working environment. (Description of this assignment as distributed to the managers is found in Appendix II.)

This report examines the effectiveness of the 1977 course in improving the management skills of the participants. Data has been gathered using a self-administered questionnaire for each component and a formalized group evaluation from which recommendations were recorded. A profile of course participants has been prepared. Each course component is evaluated separately with sections devoted to the core course, project analysis, Handbook and the modules for rural and urban managers. A summary of recommendations for future programs concludes the report.

PROFILE OF PARTICIAPNTS

Twenty managers were accepted as participants in the Social Housing Management Course. Eleven managers were men and nine were women. The majority of the participants were over 45 years of age. This data conforms to the recent CMHC national profile of managers which indicated that social housing managers were predominately middle-aged.[1]

TABLE 1 Age Distribution of Managers in Course



1. Michael Dennis and Susan Fish, Programs in Search of a Policy; Low Income Housing in Canada (Toronto: Hakkert, 1972), p. 204.

TABLE 2 Last Year of School Completed

Year	Number of Managers	Percentage
Less than Grade 9	1	5
Grade 9	2	10
Grade 10	3	15
Grade 11	5	25
Grade 12	9	45
Total	20	100

TABLE 3 Post Secondary Education

Type	Number of Managers	Percentage
None	1	5
Community	5	25
Some University	2	10
University Degree	2	10
Other*	10	50
Total	20	100

* Includes bookeeping, accounting, management, trades training.

Participants brought wide ranging educational backgrounds to the course. One participant had less than a grade 9 education while two managers had earned University degrees. Half the managers had less than a grade twelve education although all participants with one exception had some form of post-secondary education. Ninety percent of the participants reported that they had taken some training related to their responsibilities as managers. These training programs related either directly or indirectly to their jobs, e.g. accounting and bookeeping, particularly the one-write accounting system, administration and problem solving, extended care and hospital administration. This training was found in a variety of delivery modes including correspondence courses, adult education courses sponsored by the public school system, seminars and workshops offered by M.H.R.C.

TABLE 4 Housing Management Topics Previously Studied by Participants

Topic	Yes		No	
	Number	Percentage	Number	Percentage
Social Housing/ Housing Policy	4	20%	16	80%
Administration/ Problem Solving	15	75%	5	25%
Accounting/ Financial Mgmt.	13	65%	7	35%
Psychology/ Communications Skills	11	55%	9	45%
Physical Design	3	15%	17	85%
Physical Plant Mgmt.	6	30%	14	70%
Community Development	3	15%	17	85%

Three quarters of the participants had studied some aspect of administration while 65% had an accounting or financial background and just over half (55%) had studied psychology and communications skills. However, few had studied topics specifically related to housing such as Social Housing Policy (20%) Physical Design (15%) Community Development (15%) or Physical Plant Management (30%)

TABLE 5 Perceived Gaps in Education Related to Job

Subject Area felt Lacking	Number*
Financial/Accounting	3
Human Relations/Communications Skills	5
Administration and Policy Aspects	2
Social Welfare/Social Housing	3
Legal	1
None	8

* Total Adds up to 22 as some respondents felt they were lacking training in more than one area.

In comparing their education to their jobs, the largest number of participants (8) felt that there were no gaps in their education. Five felt they were lacking in education concerning human relations or communications skills while three perceived a gap in their training concerning financial and accounting skills and matters of social welfare and social housing. Interestingly, none cited a lack of education in housing design, community development or physical plant management although few participants had any training in these fields.

In addition to formal education, previous employment helped participants develop skills related to housing management. While only one manager had worked as a property manager in the past, 60% of the participants had an employment background which related to housing management, in particular administration, accounting and the social sciences.

TABLE 6 Occupational Background

Type	Number	Percentage
Property Management	1	5%
Other Administration/ and Management	4	20%
Clerical or Accounting	5	25%
Social Services (includes Clergy)	2	10%
Military	2	10%
Sales/Trades	3	15%
Farming	1	5%
Student	1	5%
No Previous Employment	1	5%
Total	20	100%

In terms of their present positions fifteen participants or 75% were employed on a full-time basis. The remaining five managers, (25%) all from rural Manitoba, worked part-time. Four out of these five managers had other employment which included bookeeping, farming and housekeeping.

The positions held by participants in the course were primarily administrative.

TABLE 7 Present Position

Job Description	Number	Percentage
Administrator	7	35%
Manager	10	50%
Tenant Relations	2	10%
Development Co-ordinator	1	5%
Total	20	100%

Eighty-five percent or 17 out of 20 managers had a job title of either administrator or manager. The remaining two participants were employed as Tenant Relations Officers in large urban housing authorities and one participant was employed by the City of Winnipeg as a Development Co-ordinator. The greatest number of course participants had been in their positions between one and three years. One fifth had been in their position for less than one year while a similiar number had been there for more than five years.

TABLE 8 Years in Position

Length of Time	Number	Percentage
Less than a year	4	20%
1-3 years	9	45%
3-5 years	3	15%
More than 5 years	4	20%
Total	20	100%

TABLE 9 Present Job Responsibilities

Job Duties	Number of Participants *	Percentage
Physical Plant Supervision	8	40%
Tenant Selection	7	35%
Tenant Counselling	7	35%
Rent Collection	9	45%
Staff Supervision	8	40%
Report to Board	8	40%
Tenant Liaison	4	20%
Rent Reviews/ Policy Development	3	15%
Budgeting	7	35%
P.R./Liason with Govt.	4	20%
Accounting	10	50%

* No total given since most participants have more than one job duty.

Most participants' jobs included several areas of responsibility but few were responsible for all aspects of housing management. Half had an accounting role. Somewhat less than half were variously responsible for tenant selection and counselling, rent collection, some staff supervision, budgeting, and reporting to the Board. Few were responsible for policy making or rent reviewing (15%) or for liaison with the public, tenants, or government (20%).

The range and type of housing managed by the participants was diverse. Forty percent of the managers had projects of under one hundred units and most of this group, 7 out of 8 managers, had fewer than fifty units. All of these managers lived in rural Manitoba. Thirty percent managed between one and two hundred units. At the opposite end of the scale were 5 participants from housing authorities with in excess of 500 units.

TABLE 10 Number of Units Managed by Participant

Number	Number of Participants	Percentage
1-24	1	5%
25-49	6	30%
50-99	1	5%
100-200	6	30%
500-700	3	15%
Over 1000	2	10%
N.A.	1	5%
Total	20	100%

The types of residents living in housing managed by course participants included the elderly in large numbers. One manager had only family housing while another had single women as residents. The most common resident type was a combination of family and elderly. Most managers had at least a few units for the handicapped.

TABLE 11 Type of Residents in Units

Type	Number of Managers*
Family Only	1
Elderly Only	5
Family and Elderly	6
Handicapped/Infirm	7
Other	1

* Many participants responsible for mixed projects of several types.

EVALUATION OF CORE COURSE

1. OBJECTIVE

The primary objective of the core course was to develop the manager's communication and administrative skill so that he or she can effectively interact with tenants, staff and members of their board. In particular the goal was to examine the process of policy formulation, decision making, budgeting and the issue of management tenant relations. In addition, a portion of the course was devoted to a review of social housing policy since the Second World War in an effort to expand the managers understanding of their role in the larger context of social housing.

2. EVALUATION OF COURSE COMPONENTS

a. CONTEXT OF SOCIAL HOUSING

CONTENT:
Trends in Postwar Housing Policy and Urban Development,
Lecture Issues underlying the provision of social housing (group exercises),
Manitoba Landlord Tenant Act

EVALUATION:	Average	Range
Level of Difficulty (1——————— 5) elementary complex	2.6	2-4
Quality of Presentation (1——————— 5) poor excellent	3.9	3-5
Materials (1——————— 5) not helpful very helpful	3.7	3-5

Degree of Relevance (1———————5) not relevant very relevant	3.3	1-5

COMMENTS:
Managers responded very favorably to this introduction to the field of social housing management. As one manager stated, "it brought to light many aspects which had been in a rather shadowy background". A request was made that the responsibilities of the different levels of government for the construction and operation of housing be clearly delineated.

The discussion of controversial issues underlying the provision of social housing was judged to be very beneficial. Because managers hold a variety of opinions and views on these issues this initial discussion helped managers to clarify their own values.

b. MANAGEMENT AND COMMUNICATIONS CONCEPTS

CONTENT:
Communications Theory (Lecture)
Factors Which Inhibit Communications (group exercises)
Tenant/Management Relations Including the Process of Aging and Needs in Family Housing (films and group discussion)

EVALUATION:	Average	Range
Level of Difficulty (1———————5) elementary complex	3.5	2-4
Quality of Presentation (1———————5) poor excellent	4.4	3-5
Degree of Relevance (1———————5) not relevant very relevant	3.9	2-5

COMMENTS:
Managers consistantly requested that more time be devoted to this very important topic. The managers gave this section a 3.9 rating for its degree of relevance which as the highest rating given any section further supports this recommendation.

The seminar for managers of elderly person's housing was rated very highly by those who participated in it.

c. FINANCIAL MANAGEMENT AND BUDGETING

CONTENT:
Budgeting and Projection Techniques, Return on Investment and Deficit Recovery (case study)

EVALUATION:	Average	Range
Level of Difficulty (1——— 5) elementary complex	3.5	2-5
Quality of Presentation (1——— 5) poor excellent	3.3	2-4
Case Study (1——— 5) not helpful very helpful	3.8	3-5
Degree of Relevance (1——— 5) not relevant very relevant	3.5	2-5

COMMENTS:
Because the case study used in this section was for a non-profit housing corporation, many managers requested that the example used reflect the more common situation, i.e. a public housing corporation.
However, most agreed that the case study approach was an appropriate choice.

d. ADMINISTRATION AND POLICY DEVELOPMENT

CONTENT:
Defining Objectives, Decision Making, Time-Management Techniques (role playing)

EVALUATION:	Average	Range
Level of Difficulty (1——— 5) elementary complex	3.2	2-5

Quality of Presentation (1———————— 5) poor excellent	3.6	2-5
Role Playing (1———————— 5) not helpful very helpful	3.6	2-5
Degree of Relevance (1———————— 5) not relevant very relevant	3.4	1-5

COMMENTS:
The roleplaying situation in which managers were asked to make a group decision on the suitability of potential tenants for a housing project with specified goals and operating style was viewed as a "practical" way to demonstrate the influence of policy and administrative routines on decision-making. As with other group activities the exercise was enthusiastically received since "everyone is more liable to contribute."

3. SUMMARY OF EVALUATION

The content of the course was judged by the participants to be generally appropriate to their abilities. The average of all component measures of difficulty was 3.2 The one area in which the material was judged to be on the simplistic was the opening session on the Context of Social Housing. However, at least one manager rated the material as too difficult. The quality of presentation was uniformily above average. The high lights for the participants appears to have been the sessions conducted by Rowley Grandpré and Helmuth Klassen on Communications Skills. Materials distributed in class including case studies, group exercises, extra reading assignments were positively received. The average of the scores was 3.8.

The scores regarding relevance of material to present job are among the most telling. Scores for all content areas indicate that on the whole the material was relevant to the position held. However, the range of scores measuring relevance are spread across the scales. In two subject areas, context of social housing and administration and policy development they range from 1 (not relevant) to 5 (very relevant) while communications and financial management sections are rated from 2 - 5.

TABLE 12 Summary Evaluation Table for Core Course

	Context of Social Housing		Communication Concepts		Financial Management		Administration Policy Development	
	Average	Range	Average	Range	Average	Range	Average	Range
Level of Difficulty	2.6	2-4	3.5	2-4	3.5	2-5	3.2	2-5
Quality of Presentation	3.9	3-5	4.4	3-5	3.3	2-4	3.6	2-5
Materials Distributed	3.7	3-5	na	na	3.8	3-5	3.6	2-5
Degree of Relevance	3.3	1-5	3.9	2-5	3.5	2-5	3.4	1-5

The managers were in agreement in stating their preference that classes include a combination of lecture and small group discussion, role playing and case-studies. The general feeling of the group was summed up by one manager who said, "the combination is ideal-lecture followed by group discussion followed by assessment by instructors." For them the emphasis should be on mutual learning in which they share ideas, experiences and effective solutions to common problems. Instructors should prepare lectures only when factual information or historical background needs to be given. A lecture ought to be precise, brief and to the point.

While participants felt that they learned more when actively involved, it should be noted that most are inexperienced with these alternative learning modes. Most have difficulty shedding their identity in a role playing situation. Initial efforts are self-conscious. Few are comfortable speaking in front of a group. Frequently the most outspoken are permitted to dominate. To ensure the effective participation of all managers, the group learning exercises must be carefully introduced. Instructions must be precise and the purpose in terms of the participant's learning explained thoroughly. Exercises, short in length but giving roleplaying or simulation participants some experience in warm-up, would an effective tool.

Many managers felt the assessment by instructors following each exercise was vital to their learning. It is an element the importance of which should not be underestimated. Even when time is short, feedback from instructors is vital. As pointed out in the evaluation, managers requested more opportunity to develop their communications skills. At the close of each exercise, the time for self-assessment should be provided. Managers should evaluate how they personally interacted with members of the group and how creatively the group evolved a solution to the problem presented. Adding this component to the course helps the participants to develop a heightened sense of how each seeks out information, formulates solutions and makes decisions.

PROJECT ANALYSIS AND
MANAGEMENT PLAN

Each course participant was required to complete a project analysis and management plan. The purpose of this paper as outlined in the directions to the managers were:

1. to objectively and critically examine the housing environment in which the manager works.
2. to formulate solutions to existing problems identified by managers
3. to devise a management plan for the efficient operation of the managers housing development

The components that participants were required to analyze included: Definition of objectives; management controls; personnel policy; leasing and occupancy procedures; maintenance of physical plant, accounting rent collection; tenant/management relations; social services; and physical design. Managers were instructed to use a problem solving approach to the paper which included five steps, definition of the problem, identification of causes, formulation of potential solutions, choice of most appropriate solution, planning for implementation of the solution.

This assignment was identified as a component part of the course in course literature and was explained during the core course. During the months between the core course and the module, visits were made by Institute staff to each housing site to discuss the paper and advise the participants on how to proceed.

The results of this process were disappointing. While all managers attending the core course and module submitted a paper, the quality was generally poor. Papers lacked rigorous analysis and were basically descriptive accounts of current

management practices. Managers were reluctant to identify problems within their operations.

Discussions with managers indicated that the assignment was basically misunderstood. Most felt the paper was more for the benefit of the course organizers than the managers. Many felt they were being asked to produce a document which would help I.U.S. staff to understand housing management as it was practiced in Manitoba.

A number of solutions to the failure of this component of the course have been proposed by participants. It was suggested that the managers be required to analyze only one aspect of their operation, e.g. tenant/management relations, and that more time be allotted to the task. A few managers found the assignment threatening because they were being asked to identify their problems and shortcomings. For those participants involved in only one aspect of housing management, for example tenant relations workers, the requirement that they review the total operation of a large Housing Authority was problematic. Other steps which might have been taken to improve the exercise include more aggressive guidance by I.U.S. staff members who tended to wait to be approached by managers for assistance rather than providing continuous checks on their progress. In spite of these difficulties, however, participants agreed that the project analysis component should be retained. Most felt that an opportunity must be provided for the managers to apply the skills and knowledge learned in class meetings.

Restructuring of the assignment, customizing it to the needs of each participant, more precise instructions and more continuous guidance will correct some of the difficulties. However, a more fundamental explanation for the limited learning which occurred can be identified. Perhaps the core course failed to develop analytical problem solving skills in the participants. Problem solving was an underlying theme throughout the course. However, one week is a very short time to develop this skill. At no time during the core course did managers directly confront their abilities to objectively analyze problems either individually or as members of a group. This systematic evaluating of problem solving skills should be integrated into the assessment that follows each simulation game, role playing situation or group exercise.

EVALUATION OF RURAL MODULE

1. OBJECTIVES

The primary objective of the Brandon module was to increase the rural manager's ability to deal with concrete aspects of housing management. Specifically, the goal was to identify problems and formulate solutions in the areas of physical design, maintenance of structure, fire safety, and the provision of social services.

2. PROFILE OF PARTICIPANTS

The managers in the Brandon module were a homogeneous group in terms of age, formal education level, and length of time in housing management. All participants with one exception were over the age of 45 and new to the housing management profession. Three of the six participants did not graduate from high school. Three had formal training in bookkeeping and accounting. For individuals who had not been in a structured learning environment for a decade or more, the management course provided an opportunity to examine their past performance and learn new skills for the future. For the instructors organizing the course, circumstances made it necessary to structure a learning environment with a carefully worked out balance between theory, and practical on-the-job applications.

TABLE 13 Characteristics of Rural Managers

Age	
Years	No. of Managers
35-44	1
45-54	3
55-64	1
65 or over	1

Length of time in housing management	
Years	No. of Managers
1-2	5
5 or more	1

Last Year of School Completed	
Years	No. of Managers
Grade 9	1
Grade 10	2
Grade 11	3

Post Secondary Education	
Level	No. of Managers
None	1
Community College/ Some University	2
Accounting, Bookkeeping, typing	3

3. THE IMPLICATIONS OF ENVIRONMENT FOR RURAL MANAGERS

The Brandon module was planned to meet the needs and interests of managers from rural Manitoba.

TABLE 14 Housing Environment of Rural Managers

Population	
Range	No. of Managers
Under 1,500	1
1,500-3,000	2
3-5,000	3
Number of units:	17-49
Average number of units:	35

Type of Housing	
Type	No. of Managers
Family	1
Elderly	2
Elderly & Family	3

The relatively small communities from which the participants came had specific implications for the course, e.g. the availibility of tradespersons to do repair work, operation of police and fire departments and the limited range of social

services. Because the number of units managed is small, all but one participant was employed on a part-time basis. As a result limited time is available to complete other than the basic administrative tasks associated with housing management. In terms of course content this meant that information about routine and preventative maintenance, and fire safety was unfamiliar to the managers.

The housing managed by rural participants is different in form and scale to that commonly found in urban centers. Typical of the situation is family housing of the single family detached type. These homes are scattered throughout the community. Elderly persons' housing is usually a single storey structure with each unit having both an interior and exterior entrance. The average age of the projects is 6 years. The oldest housing was a single family two storey home converted to hostel units and the newest built within the past twelve months. Implications for the management of the physical plant are many. For example, the maintenance of a variety of unit types and construction methods scattered throughout a community is more complex than that found in the urban situation.

4. EVALUATION OF COURSE COMPONENTS

a. PHYSICAL DESIGN

CONTENT:
The Design Process (Lecture)
Building Components (Lecture)
Design Review of Buildings (Managers' Presentation)
Designing a Single Family Dwelling (Design Game)

EVALUATION:	Average	Range
Level of Difficulty (1——————5) elementary complex	2.6	2-3
Presentation (1——————5) poor excellent	4.0	3-5
Printed Materials (1——————5) not helpful very helpful	3.3	3-5

Relevance to Present Job (1——————— 5) not relevant very relevant	2.8	2-3

COMMENTS:
Managers felt that the discussion of the managers' role in the design process was very helpful. Of particular concern was the relationship the manager has with both the architect and construction supervisor both during the construction of the building and during its first year of operation. Generally the managers found the architect's review of their individual buildings and the opportunity to discuss design problems with their buildings most beneficial.

The design exercise in which groups of managers designed a home within certain financial and physical constraints was judged to be of little value.

b. MAINTENANCE

CONTENT:
Routine and Preventative Maintenance (Lecture)
Preparation of a Maintenance Plan (Group Exercise)
Common Maintenance Problems (Question and Answer)

EVALUATION:	Average	Range
Level of Difficulty (1——————— 5) elementary complex	3.0	2-3
Presentation (1——————— 5) poor excellent	2.6	2-4
Printed Materials (1——————— 5) not helpful very helpful	3.6	3-4
Relevance to Present Job (1——————— 5) not relevant very relevant	3.1	2-5

COMMENTS:
The managers found the group exercises in which maintenance plans were prepared by managers of similar building types to be of particular benefit.

c. FIRE SAFETY

CONTENT:
The Difference Between Life and Property Safety (Lecture)
Choice of Appropriate Fire Prevention Equipment (Lecture)
Use of Fire Extinguishers (Demonstration)

EVALUATION:

	Average	Range
Level of Difficulty (1——————5) elementary complex	2.8	2-3
Presentation (1——————5) poor excellent	2.6	2-4
Relevance to Present Job (1——————5) not relevant very relevant	4.0	3-5

COMMENTS:
The managers responded positively to both the theoretical information - the difference between life and property safety - and the practical experience of using fire extinguishers. Suggestions for improvement included more emphasis on fire prevention and shortening of the lecture component.

d. FIELD TRIP

CONTENT:
A visit was made to the rural municipality of Boissevain where participants visited an elderly persons residence and two public family units.

EVALUATION:	Average	Range
Appropriateness (1 ——————5) not helpful very helpful	4.0	3-5

COMMENTS:
The feelings of the managers can be best summarized by the comment "new and useful ideas to think about in regards to our own buildings," come from visiting others.

e. SOCIAL SERVICES

CONTENT:
The Relationship Between Shelter and Non-Shelter Needs (Lecture and Roleplaying)
Identifying Social Services in Your Community (Group Problem Solving and Panel Presentation)

EVALUATION:	Average	Range
Level of Difficulty (1——————5) elementary complex	3.1	3-4
Presentation (1——————5) poor excellent	4.0	3-5
Printed Materials (1——————5) not helpful very helpful	3.5	3-5

Relevance to Present Job 3.5 3-5
(1———————— 5)
not relevant very relevant

COMMENTS:
Especially popular with the managers were the role playing and case study teaching techniques. Comments included "putting oneself in the other persons shoes is fun and thought provoking and they point out our own weaknesses and strengths."

5. SUMMARY OF EVALUATION

The general evaluation of the course components indicate that the level of difficulty chosen by instructors was neither too complex so as to be unintelligible nor too elementary so as not to be challenging. In evaluating the quality of presentations and the relevance to their jobs, participants judged the course to be above average. The two topics deemed most relevant to the manager's job were fire safety and social services.

TABLE 15 Summary of Evaluation Scores for the Rural Module

Component	Level of Difficulty		Quality of Presentation		Relevance to Job		Materials Distributed	
	Average	Range	Average	Range	Average	Range	Average	Range
Physical Design	2.6	2-3	4.0	3-5	2.8	2-3	3.3	3-5
Maintenance	3.0	2-4	3.0	2-4	3.1	2-5	3.6	3-4
Fire Safety	2.8	2-3	2.6	2-4	4.0	2-5	3.4	3-4
Social Services	3.1	3-4	4.0	3-5	3.5	3-5	3.5	3-5

EVALUATION OF URBAN MODULE

1. OBJECTIVE

The primary objective of the urban module held in Winnipeg was to increase the urban managers ability to deal with the concrete aspects of housing management. Specifically, the goal was to identify problems and formulate solutions in the areas of physical design, maintenance of structures including purchasing and contract negotiations, fire safety, security and the provision of social services.

2. PROFILE OF PARTICIPANTS

The participants in the urban module were a heterogeneous group in terms of personal characteristics and the properties which they managed. They ranged in age from under 25 to over 55. Two managers had not completed grade 11 while an equal number had a University degree. Similarly over a quarter of the group had been working in housing management for less than a year while a third had held positions in this field for five or more years.

TABLE 16 Profile of Urban Managers

Age		Length of Time in Housing Management	
Under 25	1	Less than 1 year	3
25-34	3	1-2	2
35-44	1	3-4	2
45-54	3	5 or more	4
55-64	3		

Last Year of School Completed		Post Secondary	
less than Grade 9	1	None	3
" 10	1	Community College/ Some University	6
" 11	2	B.A.	2
" 12	7		

3. THE IMPLICATIONS OF ENVIRONMENT FOR URBAN MANAGERS

The urban module was planned for managers of housing in metropolitan locations. Of the eleven managers participating one was from Brandon and the other ten from Winnipeg. All managed projects of substantial size ranging from one hundred to well over a thousand units. All managers are employed on a full-time basis. Most have a staff of one or more persons they supervise. Others work under a chief administrator. As a result not all course participants were directly involved in all aspects of housing management.

All housing managed by participants was multi-storey. Town-house units and 3 storey walk-up apartments were the common building types for family accommodation. Elderly persons housing ranged from two to sixteen storey buildings, with both bachelor and one or two bedroom suites. Elevator apartments of 4 or more stories were the most common building form. As a result course content related to maintenance of the physical plant dealt with the fire, security and maintenance problems of highrise buildings.

4. EVALUATION OF COURSE COMPONENTS

a. PHYSICAL DESIGN

CONTENT:
The Desgin Process (Lecture)
Building Components (Lecture)
Design Review of Typical Buildings (Small Group Discussion)
Designing a Single Family Dwelling (Design Game)

EVALUATION:	Average	Range
Level of Difficulty (1———— 5) elementary complex	3.3	1-4
Presentation (———— 5) poor excellent	3.7	3-5
Relevance to Present Job (1———— 5) not relevant very relevant	3.4	2-5

COMMENTS:
Managers felt that the discussion of the role of architect, construction supervisor and owner was beneficial. Because the number of managers numbered 11, only four buildings were reviewed at length. As a result many managers expressed an interest in having the architects conduct individual analysis of their project. Requests were also made that some basic solutions to design problems be included in the class.

b. BOARD-MANAGEMENT RELATIONSHIPS

CONTENT:
Problem Solving and Policy Formulation by Boards and Managers (Simulation Game)

EVALUATION:	Average	Range
Level of Difficulty (1——————5) elementary complex	2.5	2-3
Presentation (1——————5) poor excellent	3.0	2-4
Relevance to Present Job (1——————5) not relevant very relevant	3.3	1-5

COMMENTS:
The managers were in agreement that the subject of the boards responsibility in formulating policy was an important area to explore. The simulation game brought home to many the complex role managers must play since they relate to both board members and tenants.

It was suggested that a short lecture on proper procedures for conducting meetings and the role of boards precede the simulation game.

c. MAINTENANCE I

CONTENT:
Routine and Preventative Maintenance (Lecture)
Preparation of a Maintenance Plan (Small Group Exercise)

EVALUATION:	Average	Range
Level of Difficulty (1———— 5) elementary complex	2.9	1-4
Presentation (1———— 5) poor excellent	3.2	2-5
Printed Materials (1———— 5) not helpful very helpful	4.1	3-5
Relevance to Present Job (1———— 5) not relevant very relevant	4.0	2-5

COMMENTS:
Managers expressed a new awareness that maintenance requires planning and should not be handled on a crisis basis. Many felt that more time should be allotted to this very important topic. Others suggested that the maintenance plan developed by the group relate to an actual site building.

d. MAINTENANCE II

CONTENT:
Evaluating Maintenance Requirements, Budget Implications Purchasing, Labour Relations and Contract Negotiations (Mini-Lecture with Questions and Answers from Managers)

EVALUATION:	Average	Range
Level of Difficulty (1———— 5) elementary complex	3.1	3-4
Presentation (1———— 5) poor excellent	3.6	2-5
Relevance to Present Job (1———— 5) not relevant very relevant	3.8	2-5

COMMENTS:
Many managers found the informal discussion generated through a dialogue between two men experienced in maintenance very enlightening. For many this session provided an opportunity to share common concerns and maintenance problems.

e. FIRE SAFETY AND SECURITY

CONTENT:
Life and Property Safety (Lecture)
Choice of Appropriate Fire Prevention Equipment (Films and Lecture)

EVALUATION:	Average	Range
Level of Difficulty (1——————5) elementary complex	2.8	1-4
Presentation (1——————5) poor excellent	3.4	1-5
Printed Materials (1——————5) not helpful very helpful	3.5	3-5
Relevance to Present Job (1——————5) not relevant very relevant	4.0	3-5

COMMENTS:
Some managers felt that more attention should have been placed on preventive fires rather than what to do when a fire has already begun. The films were particularly well received since as one manager stated they add a "dimension of realism."

f. SOCIAL SERVICES

CONTENT:
The Relationship Between Shelter and Non-shelter Needs (Role-Playing)
Identifying Social Services in Your Community (Group Problem Solving and Panel Presentation)

EVALUATION:	Average	Range
Level of Difficulty (1———————5) elementary complex	2.8	1-4
Presentation (1———————5) poor excellent	3.3	2-4
Printed Materials (1———————5) not helpful very helpful	3.7	3-4.5
Relevance to Present Job (1———————5) not relevant very relevant	3.7	2-5

COMMENTS:
The majority of the course participants felt having to assume the tenant role in the roleplaying exercises increased their awareness of other peoples circumstances. The inter-relationship between people and property in housing management was a theme many managers found worthwhile exploring.

5. SUMMARY OF EVALUATION

Participants felt that the level of difficulty chosen by the instructors for most components was generally suited to their needs. The exception to this was the simulation game used to explore board-management relationships which most managers found not challenging enough. The quality of teaching was seen as being above average. The instructors for the physical design sections and the second maintenance component were given the highest scores. The appropriateness of the subject matter to a persons job was judged to be correct. The two topic areas viewed as most relevant were routine and preventative maintenance, fire safety and security. General maintenance problems and social services were also given high priority ranking.

It is important to note that the range of scores given each topic was widely dispersed along the scale. This is most marked in the measurement of level of difficulty and relevance where a spread of a least 3 points is not uncommon. e.g.

Physical design rated 1-4 and 1-5 respectively. This reaction by course participants can be explained by the heterogeneity of the group. Men and women either new to the field or with a few years experience in housing management and with a very different job responsibilities can be expected to react quite differently to each topic.

TABLE 17 Summary of Evaluation Scores for the Urban Module

Component	Level of Difficulty		Quality of Presentation		Relevance to Job		Materials Distributed	
	Average	Range	Average	Range	Average	Range	Average	Range
Physical Design	3.3	1-4	3.7	3-5	3.4	1-5	n.a.	n.a.
Board Management Relationships	2.5	2-3	3.0	2-4	3.3	1-5	n.a.	n.a.
Maintenance I	2.9	1-4	3.2	2-5	4.0	2-5	4.1	4.1.
Maintenance II	3.1	3-4	3.6	2-5	3.8	2-5	n.a.	n.a.
Fire Safety/ Security	2.8	1-4	3.4	1-5	4.0	3-5	3.5	3.5
Social Services	2.8	1-4	3.4	2-4	3.7	2-5	3.7	3.7.

EVALUATION OF HANDBOOK
FOR SOCIAL HOUSING MANAGERS

In the months preceeding the delivery of the course, the Handbook for Social Housing Managers was written by the staff at the Institute of Urban Studies. Knowing that it would be an impossible task to cover all topic areas in detail, the course organizers saw the Handbook as a basic source of background information to activities in class. It was also thought that the Handbook would serve as a guide and reference to managers when they returned to work.

In evaluating the Handbook following the conclusion of the final module, most managers indicated they had read major portions of the text. Many anticipated that they would refer to the Handbook regularly once back on the job. In reviewing questions asked by managers during the course, it has become apparent that certain sections of the Handbook need to be expanded. Many participants requested more discussion of human relations and communications skills. Also needed is a chapter on social housing management as an emerging profession. With these additions and minor changes, the Handbook will serve as a valuable resource to managers.

RECOMMENDATIONS AND SUGGESTIONS
TO IMPROVE COURSE DELIVERY

1. COURSE STRUCTURE

1. The four components — core course, project analysis handbook and final module — be retained in future delivery of the social housing management course.

2. Group experiences in which participants actively learn by doing continue to be the dominant learning mode.

3. A lecture/group exercise/assessment format be used for most sessions unless deemed inappropriate by the subject matter, e.g. government social housing policy.

4. The group exercises developed to examine components of the curriculum be compiled into a guidebook for other institutions training managers of social housing.

5. Responsibility for course delivery lie with fewer than three staff persons with resource persons having particular skills used on an advisory basis.

2. CORE COURSE

1. The emphasis in the core course should be on developing skills which managers require to deal with all aspects of social housing management. Generally these would include effective oral and written communication, goal setting, problem solving, planning and policy development.

2. The content through which these basic skills are examined should be related directly to social housing management.

3. An evaluation of group and individual effectiveness be conducted by each participant following all group exercises.

4. The core course be offered to all interested persons regardless of their position or geographic location.

5. Sessions on budgeting and accounting practices be included in the module. This subject matter should be included only to the degree it influences problem solving and communication skills development.

3. PROJECT ANALYSIS AND MANAGEMENT PLAN

1. This component should be retained and its potential strengthened by examining the problem solving process in detail during the core course.

2. This component should be defined on an individual basis as it relates the participants working environment and job responsibilities.

3. Qualitative criteria be established for evaluating the papers submitted. Those managers whose projects fail be meet these guidelines will be required to rework their submission.

4. MODULES

1. Each module should focus on the concrete aspects of housing management which are directly related to job performance.

2. Separate modules be held for managers from urban and rural Manitoba. Group exercises and content be appropriate to the size, scale and context of the communities in which the manager works.

3. Maintenance of physical plant, specifically routine and preventative maintenance, receive more study by managers.

4. A case study be designed to examine design issues as a substitute for the design game,"Designing A Single Family Dwelling."

5. A group exercise should be formulated to explore fire safety and security issues.

6. Material on adminstrative practices, staff supervision, accounting and budgeting be included in the module.

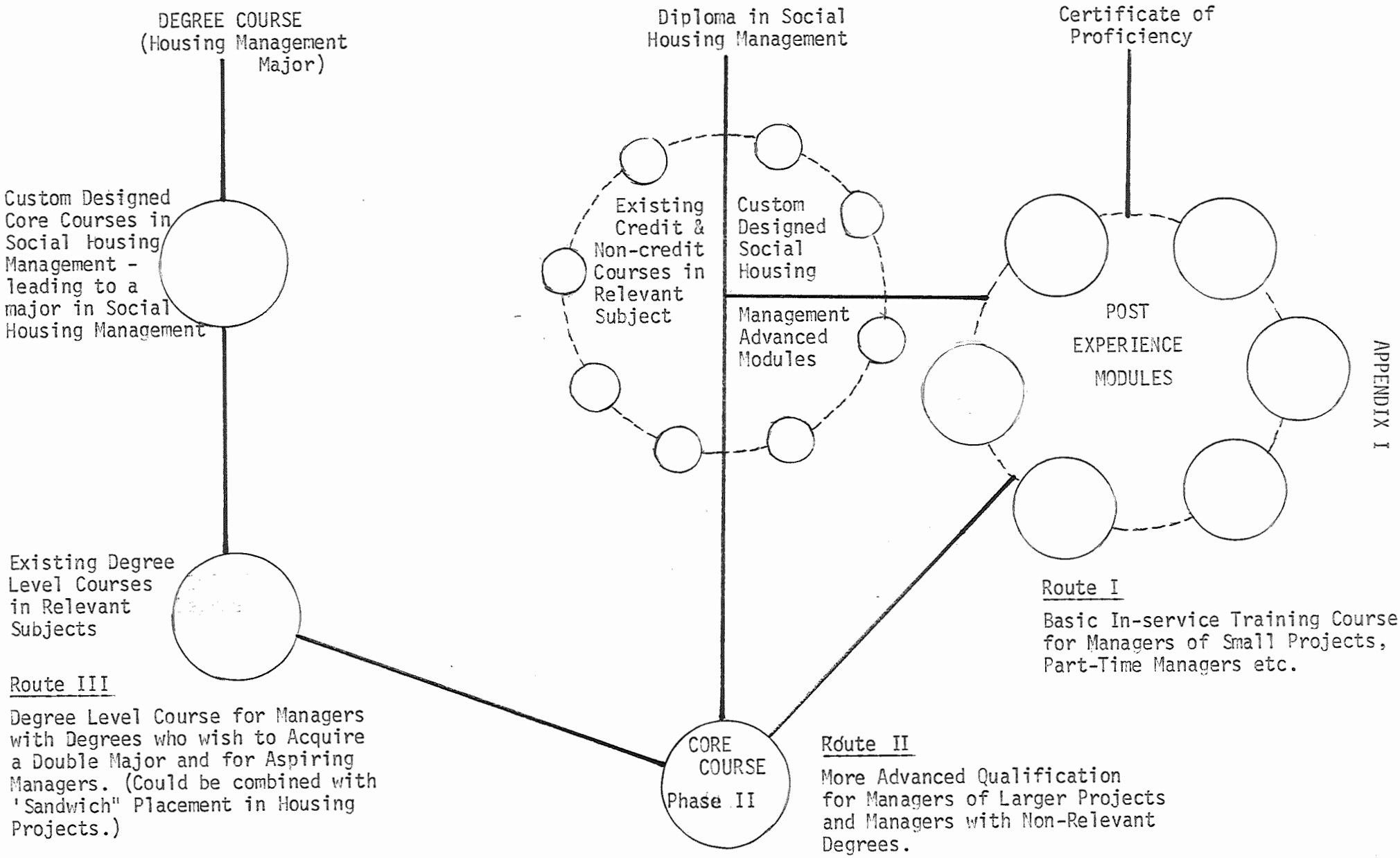
5. HANDBOOK FOR MANAGERS OF SOCIAL HOUSING

1. Copies of the Handbook should be distributed to all participants in the Social Housing Management Course. It is an important component in the total delivery of the course.

2. Revisions should be made in the draft version which would strengthen the content and expand the scope.

APPENDICES

POSSIBLE DEVELOPMENT OF SOCIAL HOUSING MANAGEMENT COURSES - UNIVERSITY OF WINNIPEG



Route III

Degree Level Course for Managers with Degrees who wish to Acquire a Double Major and for Aspiring Managers. (Could be combined with 'Sandwich" Placement in Housing Projects.)

Route I

Basic In-service Training Course for Managers of Small Projects, Part-Time Managers etc.

Route II

More Advanced Qualification for Managers of Larger Projects and Managers with Non-Relevant Degrees.

APPENDIX I

SOCIAL HOUSING MANAGEMENT COURSE TIMETABLE

A. CORE COURSE TIMETABLE

DAY DATE TIME	TOPIC HEADING AND COURSE CONTENT	FORMAT	RESOURCE STAFF (Persons mainly responsible underlined)
Day 1 Sunday May 29			
5:30 - 7:30 p.m.	Registration and Orientation		Institute of Urban Studies staff
Day 2 Monday May 30	CONTEXT OF SOCIAL HOUSING		
9:30 - 10:30 a.m.	Welcome to the course and outline of its purpose.		Christine McKee
10:00 - 10:45 a.m.	Trends in post war housing policy and urban development	Plenary Session	Lloyd Axworthy Director, I.U.S.
10:45 - 11:00 a.m.	COFFEE		
11:00 - 12:30 p.m.	Manitoba Landlord and Tenant Act Film and Presentation Group exercises	Group exercises	Joe Locke - Rentalsman - Province of Manitoba
12:30 - 1:30 p.m.	LUNCH		
1:30 - 3:15 p.m.	Issues needs and problems underlying the provision of social housing: role of agencies	Group exercises	Christine McKee, I.U.S. Claudia Engel Tom McCormack
3:15 - 3:30 p.m.	COFFEE		

APPENDIX II-A

DAY DATE TIME	TOPIC HEADING AND COURSE CONTENT	FORMAT	RESOURCE STAFF (Persons mainly responsible underlined)
Day 2 cont'd			
3:30 - 4:30	MANAGEMENT AND COMMUNICATIONS CONCEPTS Introduction to Communications and Theory and Models Overnight assignment	Informal plenary session Explanation of evening assignment	Rowley Grandpre Director - Manitoba Institute of Management assisted by I.U.S. Staff
Day 3 Tuesday May 31 9:30 - 4:30 p.m.	MANAGEMENT AND COMMUNICATIONS CONCEPTS The Importance of awareness: Modes of Communication: factors which inhibit communication: communication exercises		Rowley Grandpre Director - Manitoba Institute of Management
	Overview of theories on organizational behaviour: summary of management systems: leadership patterns: individual attitudes and values: individual orientations towards planning.	Combination of plenary and group exercise sessions(supplemented by handouts)	I.U.S. Staff
Evening	Group Decision Making and Problem Solving Sub-Arctic survival (The above topics will be covered during the course of the day interrupted by the usual breaks)	Group exercises	Claudia Engel
Day 4 Wed. June 1st 9:30 - 10:30	TENANT/MANAGER RELATIONS Parallel seminar sessions 1) the process of aging (E.P.H. managers) 2) Issues and problems related to family projects. (Family project managers)	Parallel seminars	Helmuth Klassen Christine McKee

DAY DATE TIME	TOPIC HEADING AND COURSE CONTENT	FORMAT	RESOURCE STAFF (Person mainly responsible underlined)
Day 4 cont'd			
10:30 - 10:45	COFFEE		
10:45 - 11:30	Films used as basis for discussion	Plenary session	
11:30 - 12:30	Separate group discussions on films	Group discussion	
12:30 - 1:30	LUNCH		
1:30 - 2:30	Explanation of Project Analysis	Plenary session	Christine McKee
2:30 - 3:00	Introduction to budgeting case study - explanation of overnight study	Plenary session	Wayne Bollman (Qualico Developments) Tom McCormack
3:00 - 3:30	Field Trip - Visit to different Winnipeg projects.	Bus Tour	
6:30 - 8:00	Overnight budgeting assignment	Individual (stats lab available)	
Day 5 Thursday June 2 9:30 - 12:30	FINANCIAL MANAGEMENT - BUDGETING 1) Brief plenary session 2) Budgeting and projection techniques Estimating controlled and uncontrolled expenses. Return on investment and deficit recovery. Reserves - how to obtain sufficient income Operating budget	Group Exercises linked to illustrative case study	Wayne Bollman IUS group facilitators
12:30 - 1:30	LUNCH		
1:30 - 3:30	Resumption of group exercises and culminating in a role playing session.	Group exercises Role Play	

DAY DATE TIME	TOPIC HEADING AND COURSE CONTENT	FORMAT	RESOURCE STAFF (Persons mainly responsible underlined
Day 5 cont'd			
3:30 - 3:45	COFFEE		
3:45 - 4:30	Discussion of accounting systems	Plenary session	Glen Cusack (Manitoba Institute of Management)
Evening	Possible course dinner and outing		
Day 6 Friday, June 3			
	ADMINISTRATION AND POLICY DEVELOPMENT		
a.m.	Defining Objectives Time Management Techniques Office Procedures and Management Theory Policy development and goal setting for housing managers.		Bob Adie (Co-ordinator of Administrative Studies, University of Winnipeg) Tom McCormack
p.m.	Decision making processes Problem solving	Group exercises Role play	Christine McKee Claudia Engel
Evening	Optional Lecture Program (To be announced		

DAY DATE TIME	TOPIC HEADING AND COURSE CONTENT	FORMAT	RESOURCE STAFF (Persons mainly responsible underlined
Day 7 Saturday June 4th	Individual consultations in connection with project analysis	I.U.S. staff and other resource persons who will be available throughout the summer to assist managers with project analysis work: will be available for individual and group consultations.	I.U.S. Staff

SOCIAL HOUSING MANAGEMENT COURSE

Winnipeg October 11 to 14

DAY DATE TIME	TOPIC HEADING AND COURSE CONTENT	FORMAT	RESOURCE STAFF (person mainly responsible underlined)
Tuesday October 11, 1977 9 a.m.	Rotary Villa 528 Hudson Street Welcome Review of Schedule Distribution of Evaluation Forms		Tom McCormack
9:15 a.m.	Introduction -what is design? -who is involved in design process? -roles of actors involved.	Seminar	Eric Barker Barker and Guslits Design Consultants
	Analysis of building design Based on input from managers and observations of resourse staff team		Fred Crease Project Architect Walter Pidwerbeski & Assoc.
12:30 - 1:30	Lunch at Rotary Villa		
1:30	Discussion of Projects: -Canadian Polish Manor -Kildonan Horizons -Winnipeg Regional -Rotary Villa (tour)	Small group discussions	
3:00	Design Game	Group Exercises	
Wednesday October 12, 1977 9:00 a.m.	Kiwanis Centre for the Deaf 285 Pembina Highway BOARD - MANAGEMENT FUNCTIONS Management is a Property Plus People Compromise	Simulation Game	Christine McKee Claudia Engel
12:00 - 1:00	Lunch		

APPENDIX II-B

SOCIAL HOUSING MANAGEMENT COURSE

Winnipeg October 11 to 14

DAY DATE TIME	TOPIC HEADING AND COURSE CONTENT	FORMAT	RESOURCE STAFF (person mainly responsible underlined)
Wednesday (Cont'd)			
1:00	PHYSICAL PLANT MANAGEMENT Introduction to physical plant management and maintenance Developing a plan for preventive maintenance Case 1: High rise elderly person housing and a personal care facility Case 2: Family housing	 Discussion	Gene Milgram
Thursday October 13, 1977 9:00 a.m.	University of Winnipeg Room 1C03 PHYSICAL PLANT MANAGEMENT Tenant education, purchasing, labour relations, contracting for outside services, etc.	 Round table discussion	 Gene Milgram Raymond (Bing) Crosby Pete Sanderson Gary Charles Winnipeg Regional Housing Authority
12:30 - 1:30	Lunch		
1:30	FIRE SAFETY AND SECURITY Introduction. ABC types of fire, importance of time as the critical variable, difference between life safety and property safety, the role of codes and the need to deal with how people react and behave under different conditions.		Gene Milgram Lorraine Brown Donwood Manor
2:00	Film on High rise building fires, and discussion.		

SOCIAL HOUSING MANAGEMENT COURSE

Winnipeg October 11 to 14

DAY DATE TIME	TOPIC HEADING AND COURSE CONTENT	FORMAT	RESOURCE STAFF (person mainly responsible underlined)
Thursday (Cont'd)	Film on staff training in patient care facilities and discussion. Questions to ask in evaluating your facility.		Gene Milgram
Friday October 14 1977	Canadian Polish Manor 300 Selkirk Avenue PROVIDING FOR NON SHELTER NEEDS		Christine McKee Claudia Engel
9:00 a.m.	Introduction to Non-Shelter Needs	Plenary Session	
9:30	The relationship between shelter and non shelter needs: when is a manager more than a landlord?	Role Playing	
12:00 - 1:00	Lunch: Evaluation of Course		
1:00	Planning for non-shelter needs	Group Exercises	
2:15	Enriched Housing/Social Services in the Community	Round Table Discussion	Jim Zamprelli, M.H.R.C. Jean Altemeyer, Fort Rouge Community School Jeanette Block, Office of Continuing Care Ruben Weir, Manitoba Health Services Juliette Wood, Children's Aid Society

PROJECT ANALYSIS AND MANAGEMENT PLAN

All organizations associated with the delivery and management of social housing should be organized in such a way that they follow a form or system to achieve certain objectives and goals. One way of ensuring that the operation of a housing development is managed in an efficient and effective way and implements the goals of the organization, is for the manager to undertake a detailed analysis of the housing environment in which he works and devise a plan for managing the development and organizing his role within it. This process is just as relevant for the direct employee or member of a housing authority as it is for a project manager. Without careful planning and analysis, operations tend to be haphazard and wasteful. Because most housing developments have limited operating funds, it is imperative that managers use their resources in the most effective manner possible.

The purpose of undertaking a project analysis and devising a management training program is fourfold.

- to enable managers to objectively and critically examine the housing environment in which they work.
- to assist managers identify existing problems within it.
- to assist managers solve existing problems within it.
- to enable managers to devise a management plan which will help managers anticipate future problems and make the operation of their housing development(s) more effective.

The process of undertaking a project analysis will have the following components.

I PROJECT ANALYSIS

1. Definition of Objectives

- Statement of goals of overall organization (i.e. MHRC, CMHC, housing program under which project was built, goals of sponsoring organization)
- Specific objectives of management of housing development.
- Personal work related goals of manager.

2. Management Control

- Description of management structure and establishment (i.e. board structure, staffing, etc.)
- Decision making process (description of how decisions are made in your project, actors involved)
- Control systems and delegation of authority (relationship of manager to the Board; role, function and responsibility of housing manager)

3. Personnel Policy and Staffing

- Personnel policies and procedures
- Employee training programs (if any)

4. Leasing and Occupancy Procedures

- Resident selection policies: criteria for selection
- Resident orientation and preparation for occupancy.
- Description of handbook, lists etc. used for orientation process (if any)
- Outline of office procedures

- Plan to maintain full occupancy

5. Maintenance of Physical Plant

- Outline of preventive maintenance program
- Description of Apartment Inspection schedule
- Schedule of redecoration and painting cycle.
- Garbage disposal system
- Ground maintenance plan
- Utility replacement plan
- Maintenance contracted out
- Direct maintenance staffing
- Resident education program on maintenance
- Plan to handle major repairs
- Emergency maintenance procedures.

6. Accounting System

- Description of accounting system
- Plan to handle monthly reports
- Outline of accounting staff
- Description of inventory, purchasing and record keeping systems

7. Rent Collection

- Outline of rent collection system.
- Policy on Accepting Partial payments and late payments
- Description of rent payment, record system
- Policy on serious arrears and eviction
- Policy on Security Deposit Collection and Refund

8. Tenant Management Relations

- Leasing policies and procedures
- Program for resident orientation
- Policies and procedures for handling resident grievances.
- Plan to work with resident groups
- Measures to obtain and encourage resident participation in management and activities
- Plan to work with Resident groups

9. Social Services

- Description of plan to identify resident needs
- Plan for use of internal and external available community space
- Program to provide activities
- In housing staffing (if any)
- Role residents play in activity and social service program planning
- Plan for developing linkages with outside community resources

10. Evaluation of Physical Design

- Examination of present physical design of project
- Assessment of strengths and weaknesses

II DEVISING A MANAGEMENT PLAN

There will be five main steps in the process of devising a management plan for your particular housing project or development, to suit your individual circumstances.

1. Critical analysis of your project, using the areas of examination suggested above.
2. Identification and articulation of problems related to present management systems of the project.
3. Identification of the causes of these problems.
4. Developing possible solutions and selecting the best possible solution to suit project's individual circumstances.
5. Developing a prototype managment plan for the project based on the manager's overall analysis.

Social Housing Management Course

Participant Profile

I Personal Profile

A. Name _____

Home Address _____

_____

Telephone _____

B. Last year school completed: _____

Post-Secondary education (include University or Community College programs, correspondence courses, workshop, seminars etc. related directly or indirectly to house management)

_____

_____

_____

_____

_____

Have any of these post-secondary courses covered the following topics? Describe the level and type of course, e.g. Administration: basic level, chairing a meeting, supervising staff, etc.

Social Housing and Social Housing Policy _____

_____

Administration/Problem Solving Techniques _____

_____

Accounting and Financial Management _____

_____

Psychology/Communications Skills _____

_____

Physical Design _____

_____

Physical Plant Management _____

_____

Community Development _____

_____

What do you see as the main gaps in your educational background as related to your present job?

_____

_____

_____

_____

C. Position: _____

Length of time in present position _____

Full time _____ Part Time _____

Other Employment (describe) _____

_____

Describe present job responsibilities _____

_____

_____

_____

_____

_____

_____

Employment prior to assuming this position _____

_____

_____

_____

_____

_____

II Project Profile

A. Name of Project _____

Address _____

_____

Telephone _____

B. Total Number of Units _____

C. Type of Units (circle appropriate and indicate number e.g. Hostel 49)

Hostel	_____
Personal Care	_____
Self-contained Suite	_____
Single Family Dwelling	_____
Duplex or Row Housing for Families	_____

D. Age of project _____

E. Sponsor (circle appropriate description)

Co-op Entrepreneur Non-profit

Public Other _____

_____

F. Type of resident (circle)

Family Elderly persons Handicapped

Other (describe) _____

_____

G. Describe the management structure under which your project operates and under which you personally operate? (Include a description of the Board, Council, Management Committee and staff organization, reporting procedures, etc.)

_____

_____

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To what extent is your previous working experience relevant to your present job in housing management?

_____

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_____

EVALUATION OF CORE COURSE

May 29 - June 4

No._____

I. Please check/circle the appropriate words which describe the type of social housing with which you are involved.

A. Location in a community with a population of:

_____ Over 50,000
_____ 30,000 to 50,000
_____ 10,000 to 30,000
_____ 5,000 to 10,000
_____ 3,000 to 5,000
_____ 1,500 to 3,000
_____ Under 1,500

B. Type of housing (check as many as appropriate):

_____ self-contained suites
_____ hostel
_____ personal care
_____ single family detached
_____ single family attached
_____ other _____

C. Residents (circle):

Elderly Family Handicapped

Other: (specify) _____

D. Sponsor (circle):

Entrepreneur Non-Profit Co-Op Public

Other: (specify) _____

II. Please evaluate the following aspects of the course by circling the appropriate number on the scale or answering the questions, in your own words, where space is provided.

CONTEXT OF SOCIAL HOUSING (Monday)

1. How would you rate the level of difficulty of the material included in the topic?

1	2	3	4	5
Elementary				Complex

2. How would you rate the presentation of material included in the topic?

1	2	3	4	5
Poor		average		Excellent

3. Were the materials in the handbook and those distributed in class helpful?

1	2	3	4	5
Not helpful		of some interest		very helpful

4. To what extent is the material covered relevant to you in your present job ?

1	2	3	4	5
Not relevant		fairly relevant		very relevant

5. What I liked best about this topic was (lecture, group exercises)

_____

_____

_____

_____

6. It would have been better if _____

_____

_____

_____

_____

MANAGEMENT AND COMMUNICATION CONCEPTS (Tuesday and Wednesday):

1. How would you rate the level of difficulty of the material included in the topic?

1	2	3	4	5
Elementary		about right		complex

2. How would you rate the presentation of material included in this topic?

1	2	3	4	5
Poor		average		excellent

3. Were the reading materials and handouts helpful?

1	2	3	4	5
not helpful		of some interest		very helpful

4. To what extent is the material covered relevant to you in your present job?

1	2	3	4	5
not relevant		fairly relevant		very relevant

5. What I liked best about this topic was (assignment, films, group exercises):

_____

_____

_____

_____

6. It would have been better if: _____

_____

_____

_____

FINANCIAL MANAGEMENT AND BUDGETING (Thursday a.m.)

1. How would you rate the level of difficulty of the material included in the topic?

1	2	3	4	5
elementary		about right		complex

2. How would you rate the presentation of material included in this topic?

1	2	3	4	5
poor		average		excellent

3. Was the case study approach helpful?

1	2	3	4	5
not helpful		of some use		very helpful

4. To what extent is the material covered relevant to you in your present job?

1	2	3	4	5
very relevant		fairly relevant		very relevant

5. What I liked best was (case studies, assignment, group exercise):

_____

_____

_____

_____

6. It would have been better if: _____

_____

_____

_____

ADMINISTRATION AND POLICY DEVELOPMENT (Thursday, p.m. and Friday):

1. How would you rate the difficulty of the material included in the topic?

1	2	3	4	5
elementary		about right		complex

2. How would you rate the presentation of material included in this topic?

1	2	3	4	5
poor		average		excellent

3. Were the reading materials and handouts helpful?

1	2	3	4	5
not helpful		of some interest		very helpful

4. To what extent is the material covered relevant to you in your present job?

1	2	3	4	5
not relevant		fairly relevant		very relevant

5. What I liked best about the topic was (role playing, group exercises):

_____

_____

_____

_____

6. It would have been better if: _____

_____

_____

_____

COURSE ORGANIZATION

1. Did you find the combination of lectures, small group and large group discussions helpful? Or would you have preferred a course organized with only lectures, only group discussions?

_____

_____

_____

_____

2. Did you find the case studies and role playing situations a useful learning tool? Please indicate how these techniques were/weren't useful.

_____

_____

_____

_____

3. Did you read the Handbook for Social Housing Managers? (circle)

yes no

Was the material included in the Handbook generally too simple or too difficult?

_____

_____

4. Do you think you will use the handbook when you return to your office? Why?

5. What wasn't included in the handbook which you think would be useful?

EVALUATION OF FINAL MODULE

October 11-14, 1977

I. Please check/circle the appropriate words which describe the type of social housing with which you are involved.

A. Type of housing (check as many as appropriate):

_____ self-contained suites

_____ hostel

_____ personal care

_____ single family detached

_____ single family attached

_____ other _____

B. Residents (circle):

Elderly Family Handicapped

Other: (specify) _____

C. Sponsor (circle):

Entrepreneur Non-profit Co-op Public

Other (specify) _____

II. Please evaluate the following aspects of the course by circling the appropriate number on the scale or answering the questions, in your own words, where space is provided.

PHYSICAL DESIGN (Tuesday)

1. How would you rate the level of difficulty of the material included in the topic?

1	2	3	4	5
elementary				complex

2. How would you rate the presentation of material included in the topic?

1	2	3	4	5
Poor		average		Excellent

3. To what extent is the material covered relevant to you in your present job?

1	2	3	4	5
not relevant		fairly relevant		very helpful

4. What I liked best about this topic was (lecture, group exercises, discussion of managers role in physical design, relationship with architect etc. etc.)

_____

_____

_____

_____

_____

5. It would have been better if:

_____

_____

_____

_____

_____

BOARD MANAGER RELATIONSHIPS (Wednesday a.m.)

1. How would you rate the level of difficulty of the material included in the topic?

1	2	3	4	5
elementary				complex

2. How would you rate the presentation of material included in the topic?

1	2	3	4	5
Poor		average		Excellent

3. To what extent is the material covered relevant to you in your present job?

1	2	3	4	5
not relevant		fairly relevant		very helpful

4. What I liked best about this topic was (lecture group exercises, discussion of managers role in policy making etc. etc.)

_____

_____

_____

_____

5. It would have been better if:

_____

_____

_____

_____

MAINTENANCE: (Planning for routine and responsive maintenance) (Wednesday p.m.)

1. How would you rate the level of difficulty of the material included in the topic?

1	2	3	4	5
Elementary		about right		complex

2. How would you rate the presentation of material included in this topic?

1	2	3	4	5
Poor		Average		Excellent

3. Were the reading materials and handouts helpful?

1	2	3	4	5
Not helpful		of some relevance		very helpful

4. To what extent is the material covered relevant to you in your present job?

1	2	3	4	5
Not relevant		fairly relevant		very relevant

5. What I liked best about this topic (films, group exercises, preparation of maintenance plan, solutions to my maintenance problems etc. etc.)

_____

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_____

6. It would have been better if:

_____

_____

_____

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MAINTENANCE: (Purchasing - Labour relations, Negotiating Contract, etc.)
(Thursday a.m.)

1. How would you rate the level of difficulty of the material included in the topic?

1	2	3	4	5
Elementary		about right		complex

2. How would you rate the presentation of material included in this topic?

1	2	3	4	5
Poor		Average		Excellent

3. Were the reading materials and handouts helpful?

1	2	3	4	5
Not helpful		of some interest		very helpful

4. To what extent is the material covered relevant to you in your present job?

1	2	3	4	5
Not relevant		fairly relevant		very relevant

5. What I liked best about this topic was (group discussion, solutions to my maintenance problems etc. etc.)

_____

_____

_____

_____

6. It would have been better if:

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_____

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SECURITY AND FIRE NEEDS (Thursday, p.m.)

1. How would you rate the level of difficulty of the material included in the topic?

1	2	3	4	5
elementary		about right		complex,

2. How would you rate the presentation of materials included in this topic?

1	2	3	4	5
poor		average		excellent

3. Were the films helpful?

1	2	3	4	5
not helpful		of some use		very helpful

4. To what extent is the material covered relevant to you in your present job?

1	2	3	4	5
very relevant		fairly relevant		very relevant

5. What I liked best was (films, group exercise, discussion of life versus property safety, etc. etc.)

_____

_____

_____

_____

6. It would have been better if:

_____

_____

_____

_____

NON SHELTER NEEDS

1. How would you rate the level of difficulty of the material included in the topic?

1	2	3	4	5
Elementary		About Right		Complex

2. How would you rate the presentation of material included in the topic?

1	2	3	4	5
Poor		Average		Excellent

3. Were the materials in the handbook and those distributed in class helpful?

1	2	3	4	5
Not helpful		of some interest		very helpful

4. To what extent is the material covered relevant to you in your present job?

1	2	3	4	5
Not relevant		fairly relevant		very relevant

5. What I liked best about the topic was (role playing, discussion of the inter relationship between property and people, panel presentation on services available etc. etc. etc.)

_____

_____

_____

_____

6. What I liked least about the topic was _____

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_____

COURSE ORGANIZATION

1. Did you find the combination of lectures, small group and large group discussions helpful? Or would you have preferred a course organized with only lectures, only group discussions?

_____

_____

_____

_____

2. Did you find the case studies and role playing situations a useful learning tool? Please indicate how these techniques were/weren't useful.

_____

_____

_____

_____

3. Did you read the sections of the Handbook for Social Housing Managers on the topics for this module?

_____

_____

_____

_____

4. Do you think you will use the handbook when you return to your office? Why?

5. What wasn't included in the handbook which you think would be useful?