

# **HOUSING AND PROPERTY**

**TABLE OF CONTENTS**

**A. *Background***

**A.1 Preparing the Service Strategy Business Plan .....1**

**A.2 Key Contacts .....1**

**A.3 Additional Information .....1**

**B. *Description of Current Services***

**B.1 Program Location Map .....3**

**B.2 Profile of Current Services.....5**

**B.3 Description of Clients/Customers.....7**

**B.4 Description of Suppliers, Partners and Stakeholders.....8**

**B.5 Overall Organization Structure and Staffing .....9**

**B.6 Significant Recent Activities/Initiatives .....10**

**C. *Trends and Issues***

**C.1 Emerging Trends .....11**

**C.2 Key Strategic Issues .....11**

**D. *Mandate, Objectives and Actions***

**D.1 Mandate and Objectives.....12**

**D.2 Objectives and Actions .....12**

**D.3 Strategic Plan Connection.....14**

**TABLE OF CONTENTS (Cont'd)**

**D.4 Service Principles (optional) .....14**

**E. *Monitoring and Measuring the Service Strategy Business Plan***

**E.1 Objectives and Outcomes.....15**

For E.2 Performance Targets, E.3 Corporate Performance Measurement and Benchmarking, F.1 Current Budget Introductory Comments/Analysis, F.2 Financial Structure Chart – Current Budget and F.3 2004 Current Budget summaries please refer to the Housing, Property and Facilities Asset Management and Heritage sections of this document.

For F.4 Capital Budget & Forecast Introductory Comments/Analysis and F.5 2004 Capital Budget & Forecast to 2013 Reports please refer to the Housing, Property and Facilities Asset Management and Heritage sections of the 2004 Capital Budget and 2005-2013 Capital Forecast document.

**A. Background**

**A.1 Preparing the Service Strategy Business Plan (SSBP)**

The SSBP was created by a Facilitated Project Team and Working Group. The membership of the Project Team included:

Commissioner of Housing and Property  
Directors  
Curator of the Peel Heritage Complex  
Manager, Financial Analysis and Compliance  
Manager, Strategic Projects and Services  
Administrative Assistant to the Commissioner  
Corporate Financial Analysts

The Working Group members included all those in the Project Team plus all of the department's management staff reporting directly to the Directors. The Working Group was involved in a number of key meetings throughout the process.

**A.2 Key Contacts**

Keith Ward, Commissioner of Housing and Property and General Manager, Peel Living  
905-791-7800, Ext. 4670  
[keith.ward@region.peel.on.ca](mailto:keith.ward@region.peel.on.ca)

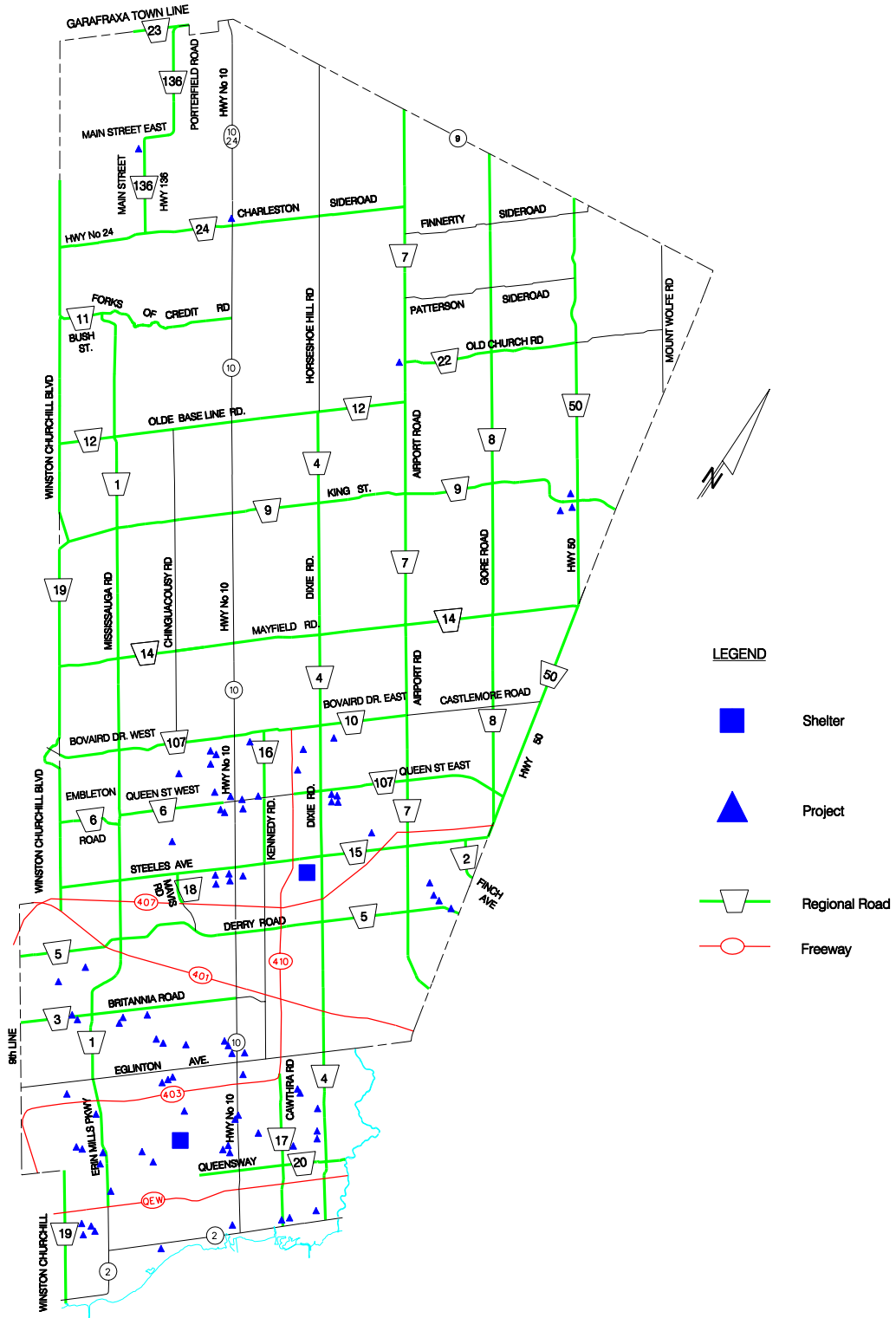
Dawn Langtry, Manager, Strategic Projects and Services  
905-791-7800, Ext. 4674  
[dawn.langtry@region.peel.on.ca](mailto:dawn.langtry@region.peel.on.ca)

**A.3 Additional Information**

The Housing and Property department (including the Peel Housing Corporation (PHC)) underwent a re-organization in 2003. As a result, the Department Management Team (DMT) decided to create one SSBP for 2004.

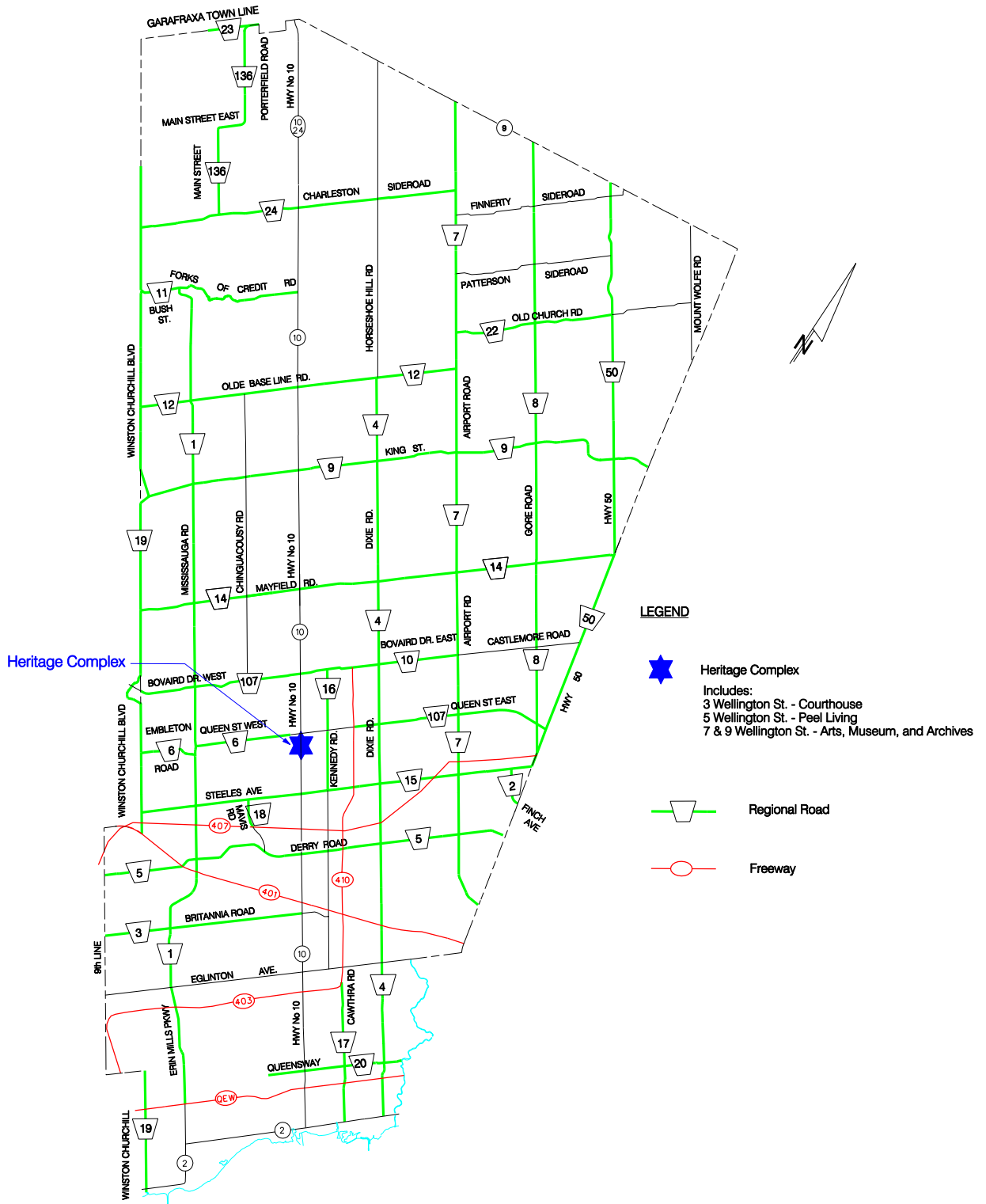
**B. Description of Current Services**

**B.1 Program Location Map**



**B. Description of Current Services**

**B.1 Program Location Map**



## **B.2 Profile of Current Services**

### **Social Housing Administration**

Directed by the *Social Housing Reform Act, 2000* (SHRA) the department is responsible for the overall administration of 48 Social Housing Providers (including Peel Living) and the commercial rent supplement program. This involves ensuring program compliance, financial administration, developing and implementing policies and procedures and the management of the centralized waiting list for all subsidized housing units throughout Peel.

### **Real Estate Services**

Involves the provision of comprehensive real estate acquisition, disposal, and inventory management services for Regional programs and projects to accommodate Regional facilities and infrastructure and to maximize the return on Regional real estate assets.

### **Office Accommodation Services**

The accommodation needs of the Corporation are managed by the department by identifying immediate and future space needs for individual departments and the Corporation as a whole.

### **Building Operations**

The department oversees all operations pertaining to the residential Peel Living buildings as well as the Region's office sites and Heritage Complex. This involves conforming to standards needed to maintain the exhibits and art stored at the Heritage Complex.

### **Customer/Client Relations**

The department has a number of clients who require specific customer service. Those who require information and advice on Peel's material culture, Regional departments who require Service Level Agreement information and advice, and Social Housing providers and applicants who require varying levels of service.

### **Residential Tenant Relations**

Peel Living and Rent Supplement's tenant relations services involve day-to-day relations with the residents living in the units. This involves conforming to the SHRA and Service Manager's policies and procedures.

The department also has relationships with tenants/members in the other Social Housing provider community when SHRA appeals are filed with the Service Manager.

### **Community Relations**

The department relies on its community and volunteer partners for much of its work, particularly in the Heritage Complex and social agencies who provide services to those living in social housing units.

### **New Development/Construction**

The department is responsible for much of the Corporation's new development and construction. This includes new affordable housing, long-term care facilities and the new Joint Use facility.

### **Capital Projects (capital improvements)**

The department oversees project management services on existing facility projects including social housing and corporate office buildings.

### **Facilities Asset Optimization (including social housing priorities, Rent Geared-to-Income (RGI) pool of units, commercial buildings, heritage)**

The department manages the delivery of an integrated life cycle, building condition and a technical audit management program (including a 10-year capital forecast and reserve fund program) for Region-owned and administered facilities. Preventative maintenance standards for the Region's commercial and residential portfolio are also managed.

### **Heritage Program Education**

The Peel Heritage Complex serves as a resource centre for archival research and public programming including workshops, lectures, family based events, art classes and outreach presentations to schools, service groups and seniors residences. The Complex brings exhibits and programs that promote Peel's culture and heritage within the context of Canadian art and heritage.

### **Advocacy**

The department seeks to influence decisions of other public and private bodies in support of clients. This includes policy collaboration with other municipalities, governments and community groups. It also lends support to Regional Council and the Peel Heritage Advisory Board in their advocacy roles.

### **Research and Policy**

The department monitors current political thinking in federal, provincial and local municipal and other municipal political arenas, as well as financial, regulatory, social and other aspects of current and proposed housing and social policy initiatives. This also includes knowledge management activities such as the Web site and the collection and storage of property and tenant/applicant data.

### **B.3 Description of Clients/Customers**

#### **Agencies/Other Organizations**

Organizations and agencies requiring information on the department's services or work in order to collaborate and advocate for the needs of the common clients.

#### **Housing Applicants**

Individuals and families in need of affordable housing apply to the centralized waiting list.

#### **Individuals and Families at Risk**

Individuals and families who are homeless or at risk of becoming homeless.

#### **Property Owners**

Property owners involved with real estate related work including easements or right-of-ways for Public Works projects, as well as apartment owners who have an interest in the Residential Rehabilitation Assistance Program (RRAP).

#### **Public**

Provides general services to the public particularly through its centralized waiting list and the Peel Heritage Complex.

#### **Regional Departments**

Housing and Property staff provides advice, support and assistance to staff in other Regional departments.

#### **Special Interest Groups/Individuals**

Provides information and advice to a number of groups and individuals who share common clients.

#### **Tenants/Members**

Social Housing providers' residents (including Peel Living).

#### **B.4 Description of Suppliers, Partners and Stakeholders**

##### **Suppliers**

- Consultants/Professional Services provide the department with legal, construction, financial and engineering advice and expertise
- Contractors/Vendors provide the department with property management services
- Landlords/Owners provide the department with rent supplement units
- Property Owners provide easements, right-of-ways
- Social Housing Services Corporation (SHSC) is responsible for providing the department, as a Service Manager, with services as outlined in the SHRA

##### **Partners**

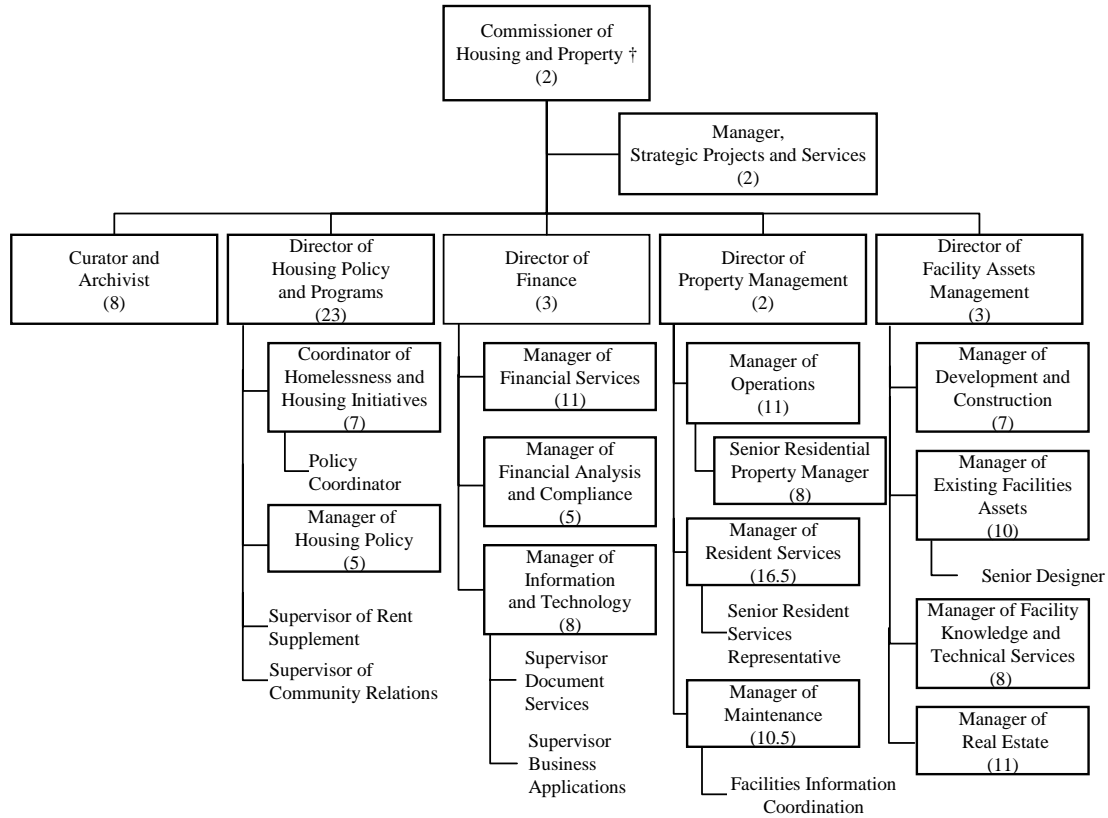
- Sector organizations/institutions/professional associations/Police engaged in joint advocacy initiatives on behalf of client groups
- Donors and volunteers work with the Peel Heritage Complex to provide services and with Peel Living to form tenant associations
- Community agencies/other governments/other Service Managers/other funders/other Regional departments/Police/Social Housing providers involved in collaborative service delivery endeavours

##### **Stakeholders**

- Area municipalities provide regulatory compliance of building, fire and property code by-laws and zoning
- Federal government and agencies fund services delivered by the department
- Peel Heritage Advisory Board of Directors sets direction for the Peel Heritage Complex
- Peel Living Board of Directors sets policy and direction for Peel Living
- Provincial ministries which fund and provide legislative services delivered by the department
- Regional Council sets policy direction for the Corporation

**B.5 Overall Organization Structure and Staffing**

**Housing and Property**



**Total Full-Time Equivalent (FTE) = 161**  
(reflects Council approved positions only)

Note:

All positions listed have supervisory responsibilities.

( ) Denotes all FTE in the group including the boxed position.

† Also serves Heritage and is the General Manager for Peel Living

## **B.6 Significant Recent Activities/Initiatives**

- Successfully implemented new organization structure for Housing and Property
- Integration of financial and information technology (IT) services with Regional departments
- Seven new housing projects in development/construction to address affordable housing needs
- Established customer service as the organizing principle of property management (completed a customer service survey)
- As one of the leading Service Managers, submitted proposed Social Housing Regulation changes and implemented the same at the Service Manager and provider level
- Completed a building condition assessment of existing Social Housing provider portfolios
- For the proposed Joint Use facility and the new Long Term Care facilities, set new standards in terms of quality and ability of the buildings to match program delivery needs
- Capital planning process used as “best practice” by Canadian Housing and Renewal Association (CHRA)
- Resurrected a housing initiative through private partnerships facilitating new housing units to address affordable housing needs
- Increased attendance at the Heritage Complex as a result of three initiatives: “Images of War”, “Avro Arrow” and “Doors Open”

## **C. Trends and Issues**

### **C.1 Emerging Trends**

- Downloading of provincial and federal responsibilities
- Increasing costs in maintaining housing portfolio – aging infrastructure
- Customer expectations exceeding the resources
- Acceleration in complexity of housing needs
- Growth in older adults program demands
- Growing lack of respect for property
- Growing percentage of arrears
- Growing need for supportive housing
- Private landlords experiencing higher vacancy loss
- Lack of provincial and federal will for social agenda has created polarized society between haves and have-nots
- More people in crisis situations – evictions, need for emergency shelters and food
- Clients increasing demand for immediate information
- Increase in working partnerships in terms of planning and delivering services
- Higher employee turnover – losing corporate knowledge as people retire or move on
- Cultural differences (i.e. six to seven people in 1 bedroom unit)
- Communication and literacy issues for residents
- Increased level of stress while trying to meet challenges

### **C.2 Key Strategic Issues**

- To create a broad human services agenda – Health/Housing/Social Services
- Create collaborative community partnerships (outside Region and government boundaries)
- Balance between human and financial responsibility (evictions or arrears)
- Plan for growth management – demographics, planning, special needs
- Develop new housing
- Advocate for appropriate government roles, responsibilities and resources
- Protect assets that the department is responsible for
- Manage competing demands and costs for the services

**D. *Mandate, Objectives and Actions***

**D.1 Mandate and Objectives**

**Mandate:**

Housing and Property will be stewards of valuable public resources, providing accommodation and cultural services to build better communities and enhance the quality of life of the residents and staff.

**Objectives:**

1. To contribute to a continuum of housing and shelter that stabilizes, builds capacity and mobilizes residents
2. To collect, preserve and make accessible the material culture of Peel
3. To protect and extend the life of physical building assets
4. To manage the workplace accommodation needs of the Corporation
5. To be a leader in the delivery of property management services
6. To strengthen teamwork within and between departments

**D.2 Objectives and Actions**

1. **To contribute to a continuum of housing and shelter that stabilizes, builds capacity and mobilizes residents**
  - 1.1 Develop a collaborative framework for housing program oversight responsibilities
  - 1.2 Create and implement a multi-layered support plan to help those who are homeless or on the verge of becoming homelessness
  - 1.3 Develop new affordable housing solutions
  - 1.4 Implement housing rehabilitation initiatives
  - 1.5 Develop an ongoing plan for the allocation of RGI subsidies
  - 1.6 Develop an advocacy strategy to promote understanding of housing issues and to address housing needs

- 2. To collect, preserve and make accessible the material culture of Peel**
  - 2.1 Acquire the best examples of Peel’s artistic, cultural and documentary heritage
  - 2.2 Provide a safe environment for art, artifacts and documentary heritage
  - 2.3 Make Peel’s heritage accessible to a broader audience
  - 2.4 Strengthen support and commitment to heritage in Peel
  - 2.5 Protect the structural and historical integrity of the Heritage Complex
  
- 3. To protect and extend the life of physical building assets**
  - 3.1 Develop a facilities asset and reserve strategy
  - 3.2 Develop a knowledge base and methodology for managing building systems
  - 3.3 Educate clients and stakeholders on the importance of protecting building assets
  - 3.4 Develop a collaborative strategy to improve building asset performance
  
- 4. To manage the workplace accommodation needs of the Corporation**
  - 4.1 Educate departments on relocation and space planning issues and best practices
  - 4.2 Improve the corporate master accommodation plan and align it with growth projections and budget cycle
  - 4.3 Create a sustainable chargeback structure
  - 4.4 Strengthen the capacity to meet accommodation and relocation needs
  - 4.5 Expand space through new construction, acquisitions and leases
  
- 5. To be a leader in the delivery of property management services**
  - 5.1 Enhance the safety and security of the property sites
  - 5.2 Improve the operational efficiencies to outperform industry benchmarks
  - 5.3 Provide superior customer service
  - 5.4 Develop a strategy for continuing business under adverse conditions
  - 5.5 Educate clients on benchmarks and best practices for property management
  - 5.6 Create and secure approval for a sustainable rental fee structure
  
- 6. To strengthen teamwork within and between departments**
  - 6.1 Partner with other departments on human services initiatives
  - 6.2 Integrate key business processes
  - 6.3 Integrate technology, data and reporting within the department and with the Region
  - 6.4 Promote the department’s culture of supporting and valuing employees
  - 6.5 Implement a cross-functional team structure to support the key businesses
  - 6.6 Work with members of Regional Council to strengthen relationships and build understanding and support for the work of the department

### **D.3 Strategic Plan Connection**

The objectives and actions in the Housing and Property SSBP are consistent with, and support, the following Goals in the Region of Peel's strategic plan, *Directions for Success: Investing in Peel's Future*.

**Goal 1:** Improve the community's health, social well-being and safety

**Goal 4:** Contribute to a vibrant and diverse regional economy

**Goal 5:** Be a leader in the provision and co-ordination of Regional services

### **D.4 Service Principles (Optional)**

The Regional Values function as the Housing and Property service principles.

**E. *Monitoring and Measuring the Service Strategy Business Plan***

**E.1 Objectives and Outcomes**

- 1. To contribute to a continuum of housing and shelter that stabilizes, builds capacity and mobilizes residents**
  - People recognize that housing is a right that can be realized
  - Understanding of the importance of housing as it affects quality of life
  - People are suitably housed
  - Peel will be an attractive place to live for a diverse range of households
  
- 2. To collect, preserve and make accessible the material culture of Peel**
  - Heritage will be sustainably funded and supported both publicly and privately
  - Peel's role in heritage is clearly understood
  - Collections and programming will continue to develop and reflect the community's interest
  - The Peel Heritage Complex will be regarded as the premier site for experiencing Peel's heritage
  
- 3. To protect and extending the life of building assets**
  - Buildings are in good condition at the lowest long term cost
  - Tenants are not inconvenienced
  - Strong in-house facilities asset preservation expertise
  - Acceptance of building life cycle needs and associated costs
  - Adequate reserve funds are in place for all buildings
  
- 4. To manage the workplace accommodation needs of the Corporation**
  - The Region of Peel always has sufficient space to facilitate its businesses
  - Clients are pleased with the space planning and relocation services
  - Relocation costs are minimal
  - Clients understand cost implications to the accommodation process
  
- 5. To be a leader in the delivery of property management services**
  - Recognized for quality service consistently applied
  - Satisfied and well informed tenants
  - Best service at lowest cost
  - Advice regularly sought by peers
  - Tenants are proud of their environment

**6. To strengthen teamwork within and between departments**

- Clear understanding of the work of the department
- Recognized as a corporate team player
- Cross divisional and departmental collaboration as a regular way of doing business
- Holistic solutions to social issues
- Housing and Property is seen as a great place to work

# HOUSING

**TABLE OF CONTENTS**

For A.1 to E.1 (inclusive), please refer to the Housing and Property 2004 Service Strategy Business Plan, found in the Housing and Property section.

**E. *Monitoring and Measuring the Service Strategy Business Plan***

**E.2 Performance Targets ..... 1**

**E.3 Corporate Performance Measurement and Benchmarking ..... 4**

**F. *2004 Financial Requirements Presentation***

**F.1 Current Budget Introductory Comments/Analysis .....5**

**F.2 Financial Structure Chart – Current Budget..... 6**

**F.3 2004 Current Budget ..... 7**

For F.4 Capital Budget & Forecast Introductory Comments/Analysis and F.5 2004 Capital Budget & Forecast to 2013 Reports please refer to the Housing section of the 2004 Capital Budget and 2005-2013 Capital Forecast document.

**E. Monitoring and Measuring the Service Strategy Business Plan**

**E.2 Performance Targets**

**a) 2003**

<b>Performance Targets</b>	<b>Status of Action</b>
To evaluate the business practices created to manage the Social Housing Administration	Completed
To develop a comprehensive continuum of both appropriate housing and related supports in Peel	Ongoing
To develop mechanisms to enable continuous awareness of housing and related issues and the ability to adapt dynamically to address the ever changing demographics, social, cultural, political and economic realities	Ongoing
To create a method to achieve a commitment to higher levels of collaboration with all stakeholders, including direct clients and customers, to address continually changing needs within the housing environment	In Process
Ongoing and pressing need to examine the regulatory environment in housing and related sectors and affect changes that will enable solutions to meet the ever changing housing and associated needs of Peel residents	Ongoing
Create and implement a multi-layered support plan to help those who are homeless or on the verge of homelessness	Completed
To utilize the Service Strategy Business Plan created in 2003 to plan departmental objectives for 2004 and directions for future years	Completed
To introduce and apply final project based benchmarks to each provider's portfolio as introduced by the Ministry of Public Infrastructure and Housing	Bring Forward

b) 2004

During 2004 Housing will be involved in implementing new initiatives and improving service delivery through the following objectives:

<b>Performance Targets</b>	<b>Status of Action</b>
Implement a web-based, on-line process for communicating and managing the centralized waiting list information with social housing providers	March 2004
Facilitate, and where necessary, enforce compliance with SHRA requirements for provider involvement with the Social Housing Services Corporation capital reserve investment pooling program	June 2004
Implement a web-based, on-line process for the electronic transfer of budget and year-end financial information from social housing providers	September 2004
Implement a comprehensive rent subsidy management strategy for the combined Rent Supplement and social housing providers portfolio to ensure ongoing compliance with SHRA-mandated Regional targets	September 2004
Develop and implement a methodology to evaluate discretionary housing policies in use in Peel, and to complete an evaluation of two such policies	October 2004
Develop and implement a support plan for Victims of Family Violence on the housing waiting list and upon placement with a social housing provider with a view to assisting with stabilization reducing tenancy issues, and building healthy provider communities	October 2004
Complete 25 provider operational reviews, consisting of 15 reviews to complete the first round of reviews of all providers and six further reviews as follow-ups on projects with identified issues, and four on federal providers	December 2004
Complete reviews of 48 social housing provider budgets and annual information returns within two months of receipt	December 2004
Implement, as a follow-up to 2003's Building Condition Assessment and Reserve Fund Study Initiative, a program of training and/or provider collaboration to ensure providers have appropriate capital and maintenance planning processes in place to extend the life of existing capital reserves	December 2004
Research and develop an eviction prevention/diversion strategy for use by Peel Living with possible extension to the remainder of the social housing provider community	December 2004

Incorporate two of the recommendations of the recently approved “Views of Older Adults in Peel Region on Housing Needs and Options: Final Report” into the strategic work plan of the Peel Advisory Working Group on Older Adults’ Housing: the sharing of information with the area municipalities and a forum for builders and developers to share and discuss the study’s recommendation	December 2004
Work with Children’s Services and Ontario Works to develop recommendations regarding opportunities for common intake services	December 2004
Complete the implementation of the electronic filing process (domino.doc) for Peel Access to Housing, Rent Supplement, and Housing Administration	December 2004
Implement the new social housing funding model and related operating benchmarks with housing providers. The Region of Peel will have three months from the release of the benchmarks to consult with social housing providers.	Dependent on Provincial Government releasing benchmarks
Interpret as necessary, communicate, and ensure implementation of changes to the Regulations governing activities under the <i>Social Housing Reform Act</i> . To be completed within three months of the release of regulation changes.	Dependent on Provincial Government
Recommend a Regional position on involvement with further allocations of the Federal/Provincial Community Rental Housing Program and/or other announced initiatives, and to implement as per Council’s direction	Dependent on Provincial Government
Participate in the SSBP roll out and implementation of cross-functional teams	Throughout the year
Participate in the Region’s development of the six affordable housing initiatives	Throughout the year
Continue to develop mechanisms to enable continuous awareness of housing and related issues and the ability to adapt dynamically to address changing demographic, social, cultural, political and economic realities. For 2004 this will include the continuation of The Building Healthy Communities stakeholder meetings which commenced in the fall of 2003.	Throughout the year
Implement improvements and modifications as necessary, of a multi-layered support plan to help those who are homeless or on the verge of homelessness. This will include a comprehensive continuum of appropriate housing and related supports.	Throughout the year

### **E.3 Corporate Performance Measurement and Benchmarking**

#### **1. Program Efficiency**

In 2004, Housing will complete the major organizational restructuring of its services and program. The division is poised to see significant improvement in 2004 with the achievement of full alignment to the new organizational structure. Housing remains committed to maintaining compliance under the SHRA in 2004.

The Region of Peel currently administers 11.7 per cent of the social housing units in the Greater Toronto Area (GTA). Reform is now a reality and the program will perform to optimize efficiencies and minimize the financial impact.

#### **2. Community Impact (not applicable)**

#### **3. Date (not applicable)**

#### **4. Customer Service**

In the effort to provide a more objective indicator of customer service quality, preparations will be undertaken in 2004 to initiate assessment involving various client surveys.

#### **5. External Benchmarking**

The province will recommend key program guidelines as part of the current program reform initiative. A benchmarking committee, with Peel representation, has been created.

**F. 2004 Financial Requirements Presentation**

**F.1 Current Budget Introductory Comments/Analysis**

The Housing 2004 Current Budget increased the property tax impact in 2004 by \$1,068,828. The increase is primarily due to two reasons: first, an increase in the subsidy payable to the Housing providers (due to inflation) which has been slightly offset by the savings in mortgage subsidies and second, an increase in the salaries and wages of staff (annual merit and fringe and increase in the Ontario Municipal Retirement System (OMERS) Pension Plan).

Program responsibilities are still expanding. Housing plans to increase the number of provincially funded Rent Supplement units. These units are 100% provincially funded and have no net impact on the 2004 Current Budget.

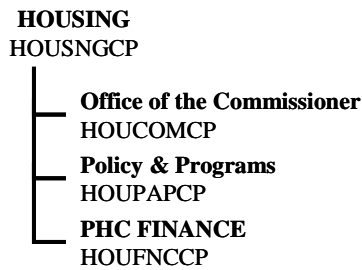
A change was made in the delivery of the Rent Supplement program in 2004. In 2003, the Housing department had planned to encourage landlord participation in the Rent Supplement program by paying the landlord the full amount of the rent and recovering the tenant's portion directly from the tenant. In 2004, this process will be changed so that the Housing department will only be paying the subsidy portion of the rent to the landlord. This effectively decreased the grant payments to the landlords and reduced the amount recoverable from the tenants with no net effect on the 2004 Current Budget.

As in the prior year, it is the administration of the existing housing, and not the new initiatives, that pose the most resource uncertainties. In particular, increasing numbers of applicants, growing waiting times, and priority placement issues associated with Victims of Family Violence, are prompting more and more time to be spent on clients. More significantly, greater attention to individual clients is required to help stabilize the most vulnerable situations, avoiding serious deterioration in their quality of life. Labour intensive collaborative efforts have been planned with Public Health and Social Services.

Together with some efficiencies in program delivery and net savings in mortgage subsidy, it will be possible to maintain the Social Housing reserve fund contribution of \$9,480,700 (as presented in the July 4, 2002 councillor workshop). This is based upon the confirmation of contributions, the predicted "schedule" of withdrawals, and the accumulation of interest earnings.

The Social Housing reserve will support future withdrawals as housing providers' capital replacement needs come to the Service Manager once their own reserves are depleted. Also, there are projected to be adequate amounts to support a modest but significant development program over the next few years. Council has approved the Region of Peel's participation in the new federal supply program which will result in the creation of an additional 496 affordable housing units. Operational costs of these new units will be recovered through operations revenues.

**F.2 Financial Structure Chart – Current Budget**



**F.3 2004 Current Budget**

**1. Activity Analysis**

	Budgeted Total Cost	
	2004	Change from 2003
Policy and Program	3,962,134	590,061
Office of the Commissioner	(36,843)	(237,600)
Finance - Program Funding	<u>89,916,253</u>	<u>(2,814,177)</u>
Total Program Cost	<u>\$ 93,841,544</u>	<u>\$ (2,461,716)</u>

**3.**

	Budgeted Total Cost/Unit	
	2004	Change from 2003
	11.65	1.46
	(0.11)	(0.72)
	<u>264.46</u>	<u>(15.69)</u>
	<u>\$ 276.00</u>	<u>\$ (14.95)</u>

**2. Account Analysis**

	Budgeted Total & Net Cost	
	2004	Change from 2003
Goods & Services	742,918	(1,263,611)
Salaries & Wages	4,247,043	988,964
Reserve Contribution	9,480,700	-
Grant Payments	<u>79,370,883</u>	<u>(2,187,069)</u>
Total Program Cost	93,841,544	(2,461,716)
Federal Funding	23,213,762	(281,431)
Provincial Funding	3,749,069	2,535,000
Fees, Charges & Other	<u>661,886</u>	<u>(5,784,113)</u>
Net Program Cost	<u>\$ 66,216,827</u>	<u>\$ 1,068,828</u>

	Budgeted Units of Service	
	2004	*Change from 2003
Brampton	115,000	6,000
Caledon	17,000	-
Mississauga	<u>208,000</u>	<u>3,000</u>
Total Households	<u>340,000</u>	<u>9,000</u>

\* Due to a policy change, household forecasts previously forecast to the nearest hundred are now forecast to the nearest thousand.

**4. Budget Variance Explanation**

	<u>Net Program Costs</u> Change from <u>2003</u>
Decrease in goods and services due mainly to a redistribution of costs to Peel Living and the Property and Facility Assets Management groups after the restructuring of Housing and Property	(1,263,611)
Increase in Salaries and Wages is primarily due to annual merit and fringe increases and an increase in the Employer's contribution to the OMERS Pension Plan	988,964
Decrease in Grant Payments due to a reduction in subsidy payments to the Rent Supplement program which resulted from a change in the administration of the program (no more direct payment for the full rent to the landlord. This was partially offset by the increase in the subsidy payments to Peel Living. This is the result of the application of the Cost Factor Increase (CFI) to Peel Living's subsidy and the payment of the Federal Subsidy Surplus (56.1 Federal Housing Program) to Peel Living.	(2,187,069)
A decrease in the amount of the Federal Funding as stipulated by the federal government	281,431
Increase in Provincial Funding is due to the recovery of costs for 100% provincially funded Rent Supplement units	(2,535,000)
Decrease in Fees, Charges and Other is primarily due to the change in the administration process of the Rent Supplement program. In 2003, the Housing Policy and Program division had planned to pay the full rent to the landlords and then recover the tenant's portion directly from the tenant. In 2004, the Housing department will only be paying the difference between the tenant's portion and the market rent. Therefore, there will be no direct recovery from the tenant.	5,784,113
<b>Net Program Cost Variance</b>	<b><u>\$ 1,068,828</u></b>

# **PROPERTY AND FACILITIES ASSET MANAGEMENT**

**TABLE OF CONTENTS**

For A.1 to E.1 (inclusive), please refer to the Housing and Property 2004 Service Strategy Business Plan, found in the Housing and Property section.

**E. *Monitoring and Measuring the Service Strategy Business Plan***

**E.2 Performance Targets ..... 1**

**E.3 Corporate Performance Measurement and Benchmarking ..... 3**

**F. *2004 Financial Requirements Presentation***

**F.1 Current Budget Introductory Comments/Analysis ..... 4**

**F.2 Financial Structure Chart – Current Budget..... 6**

**F.3 2004 Current Budget ..... 7**

For F.4 Capital Budget & Forecast Introductory Comments/Analysis and F.5 2004 Capital Budget & Forecast to 2013 Reports please refer to the Housing, Property and Facilities Asset Management and Heritage sections of the 2004 Capital Budget and 2005-2013 Capital Forecast document.

**E. Monitoring and Measuring the Service Strategy Business Plan**

**E.2 Performance Targets**

**a) 2003**

Not applicable due to restructure of Housing and Property.

**b) 2004**

**Property Management – Commercial**

During 2004 Commercial Property Management will be involved in implementing new initiatives and improving service delivery through the following objectives:

Identify all non-value added tasks	June 2004
Review current systems for the purpose of streamlining	June 2004
Develop property managers to be the gatekeepers for all communications to the clients for operational and capital issues	September 2004
Develop customer service training for the frontline staff	December 2004
Make available on Pathways current policies and procedures for client use	December 2004
Schedule monthly meetings with all client groups to discuss day to day issues	Throughout the Year
Provide monthly reports to clients concerning maintenance work order status	Throughout the Year
Be involved with the co-ordination of capital upgrades at 10 Peel Centre Drive (washrooms and meeting rooms) and offer feedback to improve working design	Throughout the Year
Assist in developing processes and procedures for Property Management and Facilities Asset Management to work together	Throughout the Year
Participate in the SSBP roll out and implementation efforts of cross-functional teams	Throughout the Year
Manage and monitor operational budgets monthly and report to clients within 30 days.	Throughout the Year

**Property Management – Residential**

During 2004 Residential Property Management will be involved in implementing new initiatives and improving service delivery through the following objectives:

Be involved with the design and development of all new housing construction in 2004 (Millbrook, Twin Pines, Peel Youth Village and Britannia) and offer feedback to improve working design	Throughout the Year
Develop procedures to take over property from builder and development construction	June 2004
Develop processes and procedures to work with Facilities Asset group to carry out major capital work within housing	September 2004
Develop site cleaning/maintenance standards and enforce	September 2004
Participate in the SSBP roll out and implementation efforts of cross-functional teams	September 2004
Review current property team set up to fairly distribute workload	October 2004
Develop customer service training for the front line staff	December 2004
Negotiate a new collective agreement	December 2004
Improve site Health and Safety awareness and compliance	Throughout the Year
Review and improve transition planning to decrease vacancy loss	Throughout the Year

**Facilities Asset Management**

During 2004 Facilities Asset Management will improve its overall performance by taking the following measures:

Establish a customer satisfaction baseline against which future customer satisfaction levels can be measured by conducting a baseline customer satisfaction survey in 2004	June 2004
Develop a comprehensive review process of the project requirements at planning time (to include detailed project justification forms)	June 2004
Improve the accuracy of capital project scope of work, priority and budget estimates by 50%	August 2004
Implement best practice improvement; streamlining teamwork and financial processes and roles/responsibilities definition with Property Management and Finance	October 2004

Reduce the annual backlog of capital projects by 25% by streamlining the overall project management process, closer collaboration with Purchasing and Finance	December 2004
Develop a sustainable recovery formula to ensure that all internal costs are recovered	December 2004
Meet all commitments made in the Auditors report as outlined in the September 2003 edition	December 2004
Develop monthly project reports for all projects	December 2004
Annual meetings to be held with all client groups to educate them on the value of implementing a comprehensive asset management plan and to outline the capital plan for the coming year	Throughout the Year
Improve working synergies with relevant departmental divisions and develop a team approach to the business by conducting joint manager team meetings with Property Management, and Finance, at a minimum of once every quarter	Throughout the Year
Improve communications with all clients before, during and after projects	Throughout the Year
Participate extensively in SSBP roll-out and implementation efforts of cross-functional teams	Throughout the Year

### **E.3 Corporate Performance Measurement and Benchmarking**

Due to the restructure in 2003, relevant Corporate Performance Measurements (CPM) could not be developed. CPM will be developed for the 2005 budget.

**F. 2004 Financial Requirements Presentation**

**F.1 Current Budget Introductory Comments/Analysis**

Property and Facilities Asset Management consists of three main groups;

- Facilities Asset Management
- Property Management
- Realty Services

Facilities Asset Management

In 2003, Housing and Property underwent a restructuring to streamline its customer service delivery. As part of the restructuring, Facilities Asset Management was created to manage the facility assets needs of the Region. The division consists of three groups:

- Existing Assets (EA)
- Knowledge & Technical Services
- Development & Construction

EA is responsible for the Capital Project Implementation Program for Peel Living and for commercial properties (such as the Health and Long Term Care facilities) and also encompasses the Facility Design group. EA works very closely with Knowledge & Technical Services, Property Management and its clients to ensure the Region has a comprehensive capital replacement plan for its facility assets. EA has no current budget impact on the Regional budget as it recovers its costs through a fee based on a percentage of the value of the capital replacement projects that it manages.

As part of the restructuring, the Facility Design group has been placed under the EA group. The Facility Design group's main responsibility is to provide space accommodation services for all Regional Departments. This group recovers costs from fees charged to its clients.

Knowledge & Technical Services is a newly created group to oversee building condition and technical audit management program, and integrated life cycle for owned Regional facilities. The group also centralizes building related information (operating, capital and maintenance) for the facility assets in the Region and ensures the information is consistent and accurate. This information will be used to develop a corporate standard for the facility assets. The group provides support to the Existing Facilities and the Property Management Operations (residential and commercial) and recovers its costs from those aforementioned groups.

Development & Construction is responsible for providing and implementing project management services on new development and construction initiatives. Development & Construction has no current budget impact on the Regional budget as it recovers its costs through capital development projects.

#### Property Management

Property Management provides comprehensive property management, both residential and commercial, to Peel Living and to the Region properties (owned and leased). Property Management consists of two main groups:

- Operations Management (residential and commercial)
- Maintenance.

Operations Management consists of a Residential Property Management and Commercial Property Management. Prior to the restructure, Commercial Property Management was under the former Property Services division and Residential Property Management was part of Peel Living. Bringing the two property management groups together will facilitate the streamlining of processes and sharing of best practices. All of the administrative costs were previously under the Peel Living envelope are now part of the Region's account structure. Residential Property Management costs are 100 per cent recovered through service charges to Peel Living.

Commercial Property Management oversees the operations for most regional owned facilities including leased areas throughout the region. Although the costs are fully recovered from fees charged to clients, there is a budgeted deficit of \$34,082 primarily resulting from increased costs from the operations of 10 Peel Centre Drive.

Maintenance is charged with the task of developing and implementing a comprehensive preventative maintenance plan designed to ensure there is no significant down time on any essential equipment and the buildings will reach and possibly exceed their expected life span.

#### Realty Services

Realty Services provides real estate services to the entire Region including capital infrastructure acquisitions. Realty Services recovers 100 per cent of its costs through capital projects and has no impact on the current budget.

There is no tax impact for Property and Facilities Asset Management 2004 Current Budget.

**F.2 Financial Structure Chart – Current Budget**

**PROPERTY & FACILITIES ASSET MGJNT**  
HSGFACCP



**F.3 2004 Current Budget**

1. Activity Analysis	Budgeted Net Cost		3.	Budgeted Net Cost/Unit	
	2004	Change from 2003		2004	Change from 2003
Facility Assets Mgmt	(34,082)	(109,161)		(0.10)	(0.33)
Property Management	34,082	71,135		0.10	0.21
Net Program Cost	\$ -	\$ (38,026)		\$ -	\$ (0.12)

2. Account Analysis	Budgeted Gross & Net Cost		Budgeted Units of Service		
	2004	Change from 2003	2004	*Change from 2003	
Goods & Services	6,260,615	2,971,825	Brampton	115,000	6,000
Salaries & Wages	5,732,031	2,940,191	Caledon	17,000	-
Capital Financing	1,128,600	18,349	Mississauga	208,000	3,000
Gross Program Cost	13,121,246	5,930,365	Total Households	340,000	9,000
Fees, Charges & Other	13,121,246	5,968,391			
Net Program Cost	\$ -	\$ (38,026)			

\* Due to a policy change, household forecasts previously forecast to the nearest hundred are now forecast to the nearest thousand.

**4 Budget Variance Explanation**

Net Program Costs  
Change From  
2003

Increase in the Goods & Services is primarily due to the restructuring of Housing and Property. There has been a shift in the costs from Peel Living to the Property and Facilities Asset Management division.

2,971,825

Increase in the Salaries & Wages is primarily due to the annual merit and fringe benefits increases coupled with the increase in the Employer's contribution to the Ontario Municipal Employee Retirement System (OMERS) pension plan and the restructuring of the Housing and Property which shifted salaries previously in Peel Living to the Property and Facilities Asset Management division.

2,940,191

Increase in the Fees, Charges and Other is due to the recovery of the property management costs from Peel Living and an increase in the recoveries by Reality Services from Public Works for capital land acquisitions.

(5,968,391)

Increase in the Contribution to Venture Capital

18,349

**Net Program Cost Variance**

\$ (38,026)

# **HERITAGE**

**TABLE OF CONTENTS**

For sections A.1 to E.1 (inclusive), please refer to the Housing and Property 2004 Service Strategy Business Plan, found in the Housing and Property section.

**E. *Monitoring and Measuring the Service Strategy Business Plan***

**E.2 Performance Targets**

    a) 2003.....1

    b) 2004.....2

**E.3 Corporate Performance Measurement and Benchmarking .....3**

**F. *2004 Financial Requirements Presentation***

**F.1 Current Budget Introductory Comments/Analysis .....6**

**F.2 Financial Structure Chart – Current Budget.....8**

**F.3 2004 Current Budget .....9**

For F.4 Capital Budget & Forecast Introductory Comments/Analysis and F.5 2004 Capital Budget & Forecast to 2013 Reports please refer to the Housing section of the 2004 Capital Budget and 2005-2013 Capital Forecast document.

**E Monitoring and Measuring the Service Strategy Business Plan**

**E.2 Performance Targets**

**a) 2003**

<b>Performance Targets</b>	<b>Status of Action</b>
Heritage Day	Completed
March Break Program	Completed
Museum Exhibitions	Completed
Art Gallery Exhibitions	Completed
Annual Juried Exhibition	Completed
Heritage Blooms Gala	Completed
Student Curated Exhibition	Completed
Film Circuit	Completed
Summer Camp Program	Completed
Youth Volunteer Program	Completed
Public Programs	Completed
Tours and Outreach School Programs	Completed
Seniors Outreach	Completed
Whitney Gallery	Completed
Artists in the Classroom – Peel as Place	Completed
Art Teens Workshops	Completed
Sculpture Competition	Ongoing

b) 2004

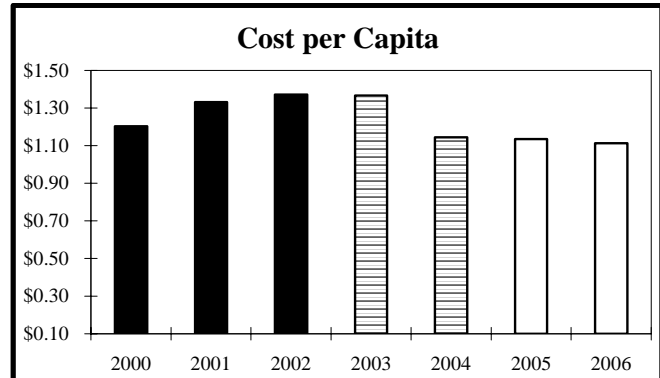
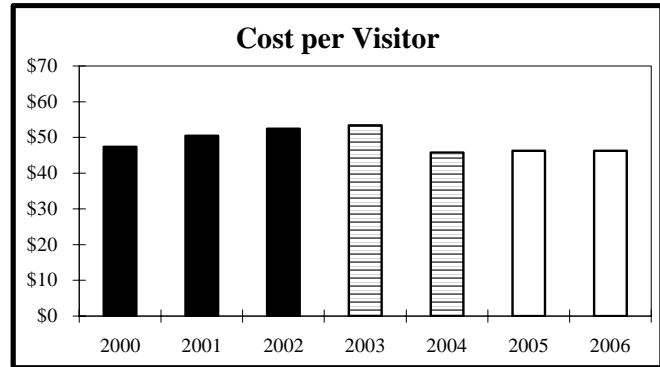
The Advisory Board of the Peel Heritage Complex has recommended the following programs and activities for 2004:

<b>Performance Targets</b>	<b>Status of Action</b>
Heritage Day	February 2004
March Break Program	March 2004
Museum Exhibitions	Throughout the Year
Art Gallery Exhibitions	Throughout the Year
Annual Juried Exhibition	April 2004
Community Garage Sale	June 2004
Student Curated Exhibition	June 2004
Film Circuit	Throughout the Year
Faux Finishing Events	July/November 2004
Summer Camp Program	July 2004
Walk for the Art of It	July 2004
Youth Volunteer Program	July – August 2004
Dinomobile	August 2004
Antique Appraisal Event	September 2004
Brain Cell Exhibition – What Kids Want	October 2004
Annual Campaign	November 2004
Holiday Show and Sale	November 2004
Public Programs	Throughout the Year
Tours and Outreach School Programs	Throughout the Year
Public Sculpture Project	Throughout the Year
Seniors Outreach	Throughout the Year
Community Gallery	Throughout the Year

**E.3 Corporate Performance Measurement and Benchmarking**

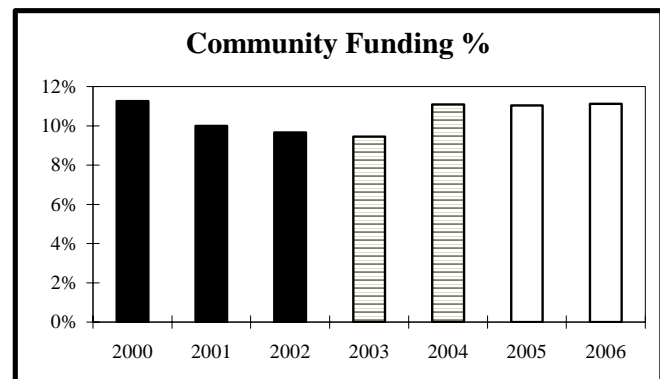
**1. Program Efficiency**

The number of visitors over the last three years has stabilized. The reclassification of Peel Heritage Complex from an external client to an internal charge is driving the gross cost per visitor and gross cost per capita. The overall net impact of this reclassification is nil. Programs at the Peel Heritage Complex are more numerous, more ambitious and better attended despite reductions in staffing and resources.

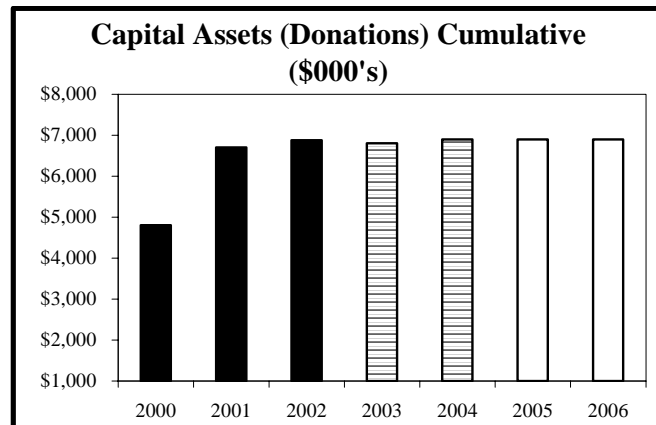


**2. Community Impact**

The percentage of funding is expected to increase by 1.7 per cent in 2004 from private and non-Regional sources. The Peel Heritage Complex makes a concerted effort to reach out to the various communities residing within Peel Region. These communities cross cultural lines and touch all age groups.



The value and quantity of the permanent collection will continue to increase. The Peel Heritage Complex holds the largest public collection of art, artifacts, photographs and documents in the Region of Peel. The permanent collection is estimated to be worth \$6.9 million.



### 3. Data

	Actual			Budget		Target	
	2000	2001	2002	2003	2004	2005	2006
<b>Program Efficiency:</b>							
Cost per visitor	\$ 47.35	\$ 50.48	\$ 52.46	\$ 53.35	\$ 45.77	\$ 46.30	\$ 46.30
Cost per capita	\$ 1.20	\$ 1.33	\$ 1.37	\$ 1.37	\$ 1.14	\$ 1.13	\$ 1.11
<b>Community Impact:</b>							
Capital assets (donations) cumulative (\$000's)	\$ 4,800	\$ 6,700	\$ 6,873	\$ 6,800	\$ 6,900	\$ 6,900	\$ 6,900
Community funding %	11.3%	10.0%	9.7%	9.4%	11.1%	11.0%	11.1%
<b>Source Information:</b>							
Total cost (\$000's)	\$ 1,154	\$ 1,318	\$ 1,404	\$ 1,441	\$ 1,236	\$ 1,250	\$ 1,250
Total community \$ raised	\$ 129,820	\$ 131,607	\$ 135,702	\$ 136,000	\$ 137,000	\$ 138,000	\$ 139,000
Number of visitors	24,366	26,103	26,770	27,000	27,000	27,000	27,000
Peel population	959,000	989,000	1,024,000	1,054,000	1,080,000	1,102,000	1,123,000

### 4. Customer Service

In 2003, programs continued to be delivered to new and diverse audiences through co-operation with numerous multicultural, heritage and history groups. It is important for these groups to be represented in professional exhibitions at the Peel Heritage Complex.

A commitment to the elderly population continued in 2003 with the Seniors Outreach Program in the homes for the aged in Peel.

The volunteer base, including the Advisory Board, reflects the broad spectrum of the Peel community. The commitment to include young volunteers in programming was established in 2001 and is continued through 2004.

**5. External Benchmarking**

There are no comparable institutions in the Province of Ontario, which offer the combined services and programs of a public art gallery, museum and archives, which both exhibit and preserve a permanent collection.

**F. 2004 Financial Requirements Presentation**

**F.1 Current Budget Introductory Comments/Analysis**

**Heritage Complex**

The Region of Peel owns and operates the Peel Heritage Complex which comprises the Art Gallery of Peel, the Region of Peel Archives, the Region of Peel Museum (housed in the former Peel County Jail and former Peel County Registry Office), former Peel County Courthouse and former Peel County Administrative Building, which is occupied by some of the Housing and Property staff. Together these buildings represent the most important historic structures in the Region of Peel.

For financial purposes the Heritage Complex is broken down into two areas: Heritage Program and Heritage Properties.

**Heritage Program**

The Heritage Program is an amalgamation of cultural and heritage community interests dedicated to the collection, preservation, exhibition, and research of Peel's art, architecture, and heritage.

The purpose of the Heritage Program is to collect, preserve, house, catalogue, research, display, interpret, and promote objects of archaeological significance and cultural and artistic heritage, and encourage arts education.

The Region of Peel encourages and supports heritage preservation, and recognizes the significant role of heritage in developing the overall quality of life for residents and visitors to Peel.

There is a Peel Heritage Complex Advisory Board, composed entirely of volunteers, which supports Heritage activities through advocacy, guidance and fundraising.

The financial impact of the Heritage Program's 2004 Current Budget compared to the 2003 Current Budget is an increase of \$9,056.

- Salaries and wages have increased due to the annual staff salary increases and increases in the contributions to the Ontario Municipal Employees Retirement System (OMERS) premiums
- The salaries and wages increase is offset slightly by an increase in the rent recovered due to an increase in the usage of space by Peel Living at 3 and 5 Wellington Street in Brampton

### **Heritage Properties**

The Heritage Properties comprise of the following buildings in Brampton:

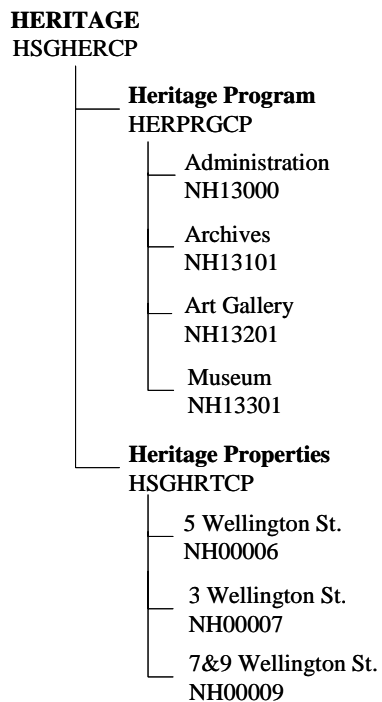
- 5 Wellington – occupied by Housing, Program and Policy staff
- 3 Wellington (Courthouse) – occupied by Housing, Program and Policy staff
- 7 & 9 Wellington (Art Gallery and Jail) – occupied by the Heritage Program (which consists of the Archives, Art Gallery and the Museum)

These are historical buildings and have to be maintained as such. For financial purposes, in 2003 the Heritage Properties were redeployed from the Property Services structure to the Heritage structure to give the whole picture of the Heritage Complex as one unit. These buildings are still maintained and managed by another division of the Housing and Property department, Property and Facilities Asset Management. The occupants of these buildings pay rent to help offset the building's expenditures.

The financial impact of the Heritage Properties' 2004 Current Budget compared to the 2003 Current Budget is an increase of \$3,620.

Overall, the bottom line for the Heritage Properties is not fully recovered by the rental recoveries, due to the space not being rentable in the Courthouse (i.e. Council Chambers and Courthouse room). These are historical landmarks and cannot be turned into rental office space. This space is sometimes rented out for weddings, movie shoots, or other events. When or if extra revenue is generated for these rentals, the funds will be reviewed and allocated at the time of rental.

**F.2 Financial Structure Chart – Current Budget**



**F.3 2004 Current Budget**

**1. Activity Analysis**

	Budgeted Total Cost	
	2004	Change from 2003
Heritage Admin.	193,424	(41,294)
Archives	266,842	28,973
Art Gallery	340,450	1,896
Museum	310,585	36,176
Heritage Properties	124,493	(230,538)
Total Program Cost	<u>\$ 1,235,794</u>	<u>\$ (204,787)</u>

**3.**

	Budgeted Total Cost/Unit	
	2004	Change from 2003
	0.57	(0.14)
	0.78	0.06
	1.00	(0.02)
	0.91	0.08
	0.37	(0.70)
	<u>\$ 3.63</u>	<u>\$ (0.72)</u>

**2. Account Analysis**

	Budgeted Total & Net Cost	
	2004	Change from 2003
Goods & Services	449,195	(260,266)
Salaries & Wages	512,435	44,279
Capital Financing	274,164	11,200
Total Program Cost	1,235,794	(204,787)
Fees, Charges & Other	203,720	(179,463)
Subsidies	-	(38,000)
Net Program Cost	<u>\$ 1,032,074</u>	<u>\$ 12,676</u>

	Budgeted Units of Service	
	2004	*Change from 2003
Brampton	115,000	6,000
Caledon	17,000	-
Mississauga	208,000	3,000
Total Households	<u>340,000</u>	<u>9,000</u>

\* Due to a policy change, household forecasts previously forecast to the nearest hundred are now forecast to the nearest thousand.

**4. Budget Variance Explanation**

Net Program Costs  
Change from  
2003

Program costs have decreased primarily due to a change in the recovery mechanism for 3 and 5 Wellington. After the restructure of Housing and Property, the bulk of the costs will be recovered through an internal charge rather than Fees, Charges and Others. (204,787)

Decrease in the recoveries is primarily due to the restructuring of Housing and Property. The rent is now recovered through an internal charge rather than through the Fees, Charges and Other. 217,463

**Net Program Cost Variance** \$ 12,676