

MANAGEMENT OF HOUSING PROJECTS

FOR THE AGED

IN B.C.

A report prepared under contract  
for C.M.H.C. for consideration by  
the B.C. Federal-Provincial Housing  
Policy Committee.

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## SUMMARY

This study was commissioned to report generally whether there were problems in projects which could cause discomfort to elderly residents, cost to managers, and concern to Government. It has concluded that though a number of problems present themselves, the problems are not insuperable and would not point to the likelihood of an incipient revolt by tenants, a wholesale failure of the mortgages or to the need for crash training courses for managers, Boards or residents. The report points out, however, that it is hazardous to rely on such a small sampling for accurate information, and that it would be wise to continue the study with attention to factors such as project size, costs, and renovation requirements. Comment is also made that there is another fairly significant portfolio of "special" non-profit societies about which practically nothing is known, except that it runs into management and mortgage problems more frequently than does the seniors' group. It should be of concern to Government to obtain information on this group similar in quality to that on the seniors.

For this study, visits were paid to, and interviews conducted at 5 small projects containing 40 units and less, 5 medium size containing between 41 and 100 units and 5 large with 101 units or more.

Five of the above contained care facilities and their management is so structured by Provincial regulations that it is considered that whatever problems they may have are not of immediate concern to housing authorities.

In none of the smaller projects could there be discovered serious management problems. It was noticeably easier to arrange interviews in smaller projects and to see the suites there than in the larger facilities, and there seemed to be a more "homey" feeling about these smaller projects than in the larger ones.

It was in the largest projects where the problems of management appeared and these have been arranged in three categories: relationship problems of on-site managers to tenants and to Boards, an absence of systematic managerial systems with respect to rent collections, repair work, and replacement, and thirdly, lack of effective communication with C.M.H.C. pre and post loan commitment.

In addition to these problems there are management headaches caused and exacerbated by the inheritance of buildings poorly designed and constructed. The second case study illustrates one such example.

Although the study was not constructed along rigorous research lines, it was governed by three general hypotheses: (1) that there would be more problems of management in small projects in smaller centres, (2) that older projects would have produced more problems for management than newer ones, (3) that these projects which were affiliated with large network organizations, such as service clubs or churches, would experience less managerial problems than the unaffiliated, ad hoc housing groups.

The first hypothesis would now appear to have been incorrectly stated. While there may be maximum management inexperience in small projects, there is a greater probability that the residents will "carry" the project themselves and hide the results of poor management.

With respect to the second hypothesis, the sample was too small to correlate the effects of age. Two older projects showed neither serious signs of wear and tear, nor did the management seem remarkably poor. It is clear, however, that new projects have their share of problems with their management.

As for the question of affiliation, it would seem that only one of the seven projects affiliated with service clubs etc. had management problems. Both church related ones had regulations repressive relative to the existing societal norm, and residents from one of these societies are objecting to the management. Of four unaffiliated groups, two had problems. Tentatively, therefore, it may be cautiously claimed that the more reliance which is placed on experienced, non-sectarian establishments, the less there will be subsequent problems.

Finally, it has been concluded that there are certain elementary and routine matters pertaining to C.M.H.C. which can impact positively on all aspects of housing for the aged. These are noted in the recommendations.

## 1. BACKGROUND

Government participation in housing for the elderly in limited profit or non-profit enterprises began in 1952. In the ensuing quarter century, some 350 projects have been built either with financing entirely from Central Mortgage and Housing or with a combination of society equity, capital grants and operating subsidies from Provincial and Federal Governments.

Over the years there have been occasional complaints from tenants of these projects. Investigation has shown-up problems ranging from inept management to outright terrorism of occupants by managers. Nevertheless, the apparent incidence of such problems has remained so miniscule that the funding bodies have seen no need for a systematic investigation of the portfolio. Certain recent occurrences, however, have produced evidence that there are substantial defects in routine maintenance of certain projects, poor management-tenant relations, and defects in the mortgage-mortgagor relationships.

If this has been the case with four or five projects, would there be widespread problems in the others? Neither the prospect of 19,000 protesting senior citizen tenants nor the collapse of a mortgage portfolio of \$200.00M would be a spectacle which politicians or bureaucrats could relish. Accordingly a month long investigatory probe was launched at the behest of the B.C. Federal-Provincial Housing Policy committee in February 1978 to ascertain:

1. If there are unattended problems in senior self-contained non-profit projects.
2. If so, their nature and scope.
3. Options for remedial activity.

## 2. METHODOLOGY

This investigation was not conceived as a quantitative research project and it was not conducted under rigorous conditions usually associated with social research, which requires results to be measured against a norm, a control group, or measured ipsitively. Rather the study set-out to identify issues which might give clues about how the program might be improved or the policies surrounding it altered.

To do this two questionnaires were developed to probe and "draw-out" responses. These were "pretested" on two societies and proved too successful: to avoid endless interviews the questionnaire for managers and/or Board members had to be shortened, and the other for residents dropped entirely. (See Appendix A and B for questionnaires)

Letters were sent to 22 societies picked from projects in the Vancouver, Victoria and Kelowna C.M.H.C. Branch areas (Appendix C). The choice was arbitrary but apart from being on the basis of relative travelling convenience and economy, was modified by the following three hypotheses:

1. That smaller projects in smaller centres would be more likely to be without the expertise necessary for competent management and hence management would be performed less adequately than larger projects in larger centres having access to the requisite expertise.
2. That older projects (pre 1973) would provide more indicators of incomplete management by virtue of insufficient repair, replacement and upkeep, than would newer projects.
3. That projects sponsored by service clubs such as the Legion, Kinsmen, Kiwanis etc. would provide a better level of management than would those run by an unaffiliated non-profit group.

Therefore, to test the above it was necessary to exercise some judgement regarding which projects would most likely demonstrate appropriately. Unfortunately, a shortage of time precluded visits to far-flung projects known to have difficulties. Interviews were obtained preferably with Board member closest to the operating of the project, the on-site manager if there was one, and with at least one resident per project. A positive reception of the investigator was encountered in all projects, and interview-conversations with residents were not at all difficult to arrange. Most managers and residents were only too happy to show off their premises and were reasonably frank about any problems. Some of them welcomed a chance to discuss their troubles.

A total of  $2\frac{1}{2}$  weeks was spent "on the road". Owing to the time spent travelling plus the two or three hours interviewing, it was not possible to cover more than 2 or 3 projects per day, and only 15 projects (or a 4 percent sample) was obtained. In only half these projects was it possible to catch a Board person, a manager and a resident and also do a thorough site inspection. Therefore, the findings are based on a minute sample of about 2 percent profiles which could be claimed as "satisfactorily complete".

### 3. UNIVERSE

Tables I and II break the numbers and types of units available into C.M.H.C. Branch areas. No comparison of the number of units/beds available in this portfolio to the elderly population as a whole has been attempted, and although it is tempting to suggest that it would be worthwhile, the Branch boundaries do not follow the census tracts and analysis would be difficult. The figures reflect commitments to December 1976, therefore some of the latest of those committed will not yet be completed or occupied (e.g. North West Temple, New Westminster Legion). Figures for 1977 (Table II) are approximate, and should be updated as soon as the requisite reports are processed.

TABLE I

NUMBER OF PROJECTS FOR SENIOR CITIZENS  
TO DECEMBER 1976

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<u>Branch Area</u>	<u>Small Under 40 Units</u>	<u>Medium 41-100 Units</u>	<u>Large 101+ Units</u>	<u>Total</u>
Kamloops	12	5	-	17
Prince George	14	7	-	21
Cranbrook	17	7	-	24
Kelowna	27	4	3	34
Victoria	42	12	5	59
Vancouver	82	71	36	189
	<u>194</u>	<u>106</u>	<u>44</u>	<u>344*</u>

\* Of this total 266 projects, containing 13,238 units, receive Provincial Assistance.

TABLE II

NUMBER OF UNITS BY SIZE AND TYPE  
TO DECEMBER 1976

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<u>Branch Area</u>	<u>Hostel*</u>	<u>Bachelor</u>	<u>1-Bedroom</u>	<u>2-Bedroom</u>	<u>Totals</u>	<u>(Total Loan in \$m)</u>
Kamloops	73	236	202	1	512	5.84
Prince George	281	275	95	-	651	6.05
Cranbrook	387	138	198	-	723	6.72
Kelowna	241	549	310	-	1,100	15.78
Victoria	339	1,039	572	2	1,952	17.76
Vancouver	<u>3,241</u>	<u>6,348</u>	<u>2,525</u>	<u>68</u>	<u>12,182</u>	<u>127.38</u>
	4,562	8,585	3,902	71	17,120	\$179.53m
1977 (Approximate)	<u>330</u>	<u>217</u>	<u>200</u>	<u>-</u>	<u>747</u>	<u>23.0</u>
	<u>4,892</u>	<u>8,802</u>	<u>4,102</u>	<u>71</u>	<u>17,867</u>	<u>\$202.53m</u>

\* "Hostel" refers to personal or intermediate care beds, plus units which are self contained but lack cooking facilities, necessitating central dining room.

#### 4. FINDINGS

Extreme caution is urged in the interpretation of these findings. The sample is far too small to be conclusive. Yet in those projects where the investigator feels he has a complete profile compiled from three sources (Manager, Board person and Resident), a number of observations are possible, and are indicative of problems throughout the seniors' portfolio. These observations are collected in the following categories.

##### (a) On-Site Management

Of the 15 projects, 11 had on-site managers. Excluding the 5 which were entirely or partially care facilities, and thus regulated under a health regimen, the remaining had very different activities, different perceptions and their roles, and different ways of relating to their boards.

Typically projects over 40 units had someone living-in, though it was common to find medium large projects of 80-100 units which operated without a resident caretaker.

It is instructive to observe that of the projects where problems have been discovered, or are suspected, are those with on-site personnel. In only one projects, where there was a resident manager, was there no problems. In that case on-site management comprised of a retired couple who did little janitoring, paid for their unit at the same rate as everyone else, and received no regular salary. An occasional \$25 was donated at the discretion of the Board for "keeping an eye on things", such as keeping spare keys, checking on the infirm and calling the Board if problems develop.

The worst situation which involved on-site management was one where there were 146 units, one resident manager, and one resident caretaker. The total cost for this was \$17,000 per annum plus free rent (estimated at \$4,800 p.a.). The problems here were questionable attitudes towards residents, role confusion on the part of the Board towards the on-site manager, lack of job definition for the on-site janitor, perception by on-site manager that he should be performing a managerial function commensurate with a wage of \$10,000, and an awkward relationship between the manager, who was, himself, a Board member, and the Board which also instructed him.

In another case the Board exerted a strictness which the on-site manager found uncomfortable and resisted. For example, the Board refused residents the right to hang laundry outside, potter in the garden in front of their units, or do any other little chore on the grounds. When the caretaker allowed this in the interest of "human relations" tension developed between him and his Board. In another case (not investigated by request of the C.M.H.C. and the Ministry of Housing Managers as the situation is currently receiving their attention) the Board has closed the social centre and the Chapel, and has threatened any residents with eviction if they complain. According to the "evidence", this sort of high-handed behaviour has already drawn



the protest and the resignation of one resident manager.

The "property first" syndrome which was encountered to a more or less degree in most projects was especially noticeable in one large project, which had the virtue of being managed with precision, and was under tight controls. Not a resident was to be seen at mid afternoon. Not an item was out of place. Chairs were arranged with military exactitude. A mass of recreation material and games were available but were said to be never used. The sterility of the "home" was remarkable, though not to expect to find this occasionally would be unrealistic. In this, as well as several other projects the manager used the phrase "they are just like children" and yet the atmosphere was more like that of a mausoleum than a nursery.

The remaining projects which had problems were not so much a result of conflicts over roles between Board and Managers, or with incompetent managers, but the lack of systematic management routines in place. These are described below.

(b) Management Routines

Not one project could be said to have a total management system in place. Of what this system consists is a matter dictated to a large degree by the size of the project. Appendix 'D' lists the major areas around which records should be available in a medium or large project.

In projects of 20 units or less applications, rent collections, maintenance and resident complaints etc. can be handled easily by one person with what little paper there needs to be stuffed in some shelf at the back of the store. And this is more often the system than not in small projects but when it is extended to larger projects things tend to get out of hand.

That the treasurer can produce a financial statement which satisfies the C.M.H.C. categories in every way does not mean that a system to collect the data is necessarily there. Nor does the rent reported necessarily mean it is precisely what the tenants pay.

(c) Maintenance and Replacement

In older projects, it is usual to find fridges and stoves, floor coverings and tiles which have never been replaced, kitchens and bathrooms which have broken cabinets or cracked toilet seats. In many cases suites have not been painted for years, and in some the paint is of the quality that cannot be washed. It is not that the Board is reluctant to replace or repair, so much as ignorance that there are things which need attention. Because many tenants are reluctant to ask management to replace worn out fixtures, the need for periodic checks, with replacements and renovations every few years seems obvious. Yet only one project had an annual inspection. On the other hand a definite reluctance was encountered in one project to expend the replacement reserve although there were many items which needed replacing. The reason given was that the society wanted to build the fund to the maximum permissible and allow it to earn income in high yielding deposits.

Several societies reported that while the replacement reserve established by C.M.H.C. at between 0.4 and 0.6 of 1% was more than sufficient, the maintenance reserve was becoming strained. Probably this reflects the rise in labour costs which have not been reflected in updating the maintenance formulae. Difficulties are being experienced obtaining parts for older models of stoves and refrigerators. Sometimes small refrigerators of the 1960's cannot be replaced with machines of similar dimensions, and costly cabinet surgery is required to accommodate larger models. Since suppliers are not stocking parts as long as they used to replacements will have to be done on a more frequent basis in the future.

Replacement and maintenance is considerably higher on buildings poorly designed and where high costs have led to design alterations and savings during construction. One of the cases cited below is a case in point and leads one to conclude that where costs are "pushing the benchmark maximum" the project should be aborted. Otherwise skimping to save a few dollars at the development stage will automatically lead to higher operating costs, unpleasant rent jumps and complaints to all concerned.

(d) C.M.H.C.

Several societies commented that no guidance was given at the time of mortgage assumption with respect to management systems, managing people, and the operating agreement. In only one case was there a thorough understanding of this agreement, and there is some evidence that some societies are "highgrading" applicants rather than serving lower income seniors.

One society which is having severe difficulties asked C.M.H.C. for assistance to rectify a defective building and was told nothing could be done for them. It was clear from a cursory inspection of the premises that C.M.H.C. not only had a responsibility at that time to reinspect the building and to suggest further action, but also now, has programs and alternatives which could rectify some of the problems. Appropriate action has now been commenced.

Four complaints were made that C.M.H.C. approved buildings that have since proved defective. One case is set out below and includes a leaking flat roof, and the other three involve shake roofs. One of these roofs leaks under conditions of snow and when the strong prevailing winds push the rain upwards and under its shallow pitch. In the other two cases, crows (*genus corvus brachyrhynchos*) are prying loose shakes in a search for grubs and other tasty meat and in the process lifting the nails and flashings. These birds are described by the Field Guide as large and gregarious. They are also strong and fearless and, like vultures, remove themselves reluctantly from the scene of destruction only under the extreme agitation of caretakers or visitors like myself. They also have a habit of pulling the nails after they are loosened. These roofs are not expected to last long.

The implications of replacing roofs prematurely are serious. Apart from the costs, the logistics of relocating elderly and often infirm people while the roof is fixed, is staggering.

A problem common to all societies which have built facilities in stages over the years is equalization of rents. No legal mechanism exists which permits C.M.H.C. to allow a society to raise rents of an older section of the project and reduce rents on a recent addition. What happens is that to prevent residents moving from higher priced suites (for example, those subsidized to 25 percent Mincome) to older, similar size, only slightly less attractive units in the same project at, say, 16 percent of income, societies tend to raise the rents on the older units and reduce them on the newer ones. Yet to honour their mortgage commitments differential rents should be reported and charged. One of the projects inspected was built in four stages from 1956 to 1975, yet the rent differential is less than \$5. One suspects internal subsidization.

(e) Cost

That there are economics of scale has been often the reason given for building high buildings, or dense developments on expensive land. There is considerable doubt to this belief when one looks at senior citizen developments. Again, caution is urged in taking these findings at face values: there is some doubt as to the veracity of the rents reported on the C.M.H.C. documents.

TABLE III

Median Rentals by Size of Project

	<u>Small</u> <u>Under 40 Units</u>	<u>Medium</u> <u>41 - 100</u>	<u>Large</u> <u>101 +</u>
1975 N = 17	\$151	\$187	\$172
1976 N = 13	\$191	\$239	\$287

What this would appear to indicate is that it pays "hands down" to build units in smaller projects. The rents are less, and the subsidies are also less.

The question of how much does government subsidize seniors is currently of more interest to the Provincial Government than it is to C.M.H.C. which still is only interested in the numbers of units subsidized rather than how much public money is being expended on subsidies. Prior to 1973, 78% of units in B.C. had rents under 25 percent basic pension plus supplementary benefits, while in post 1973 projects, 92 percent of units had rents over 25 percent of Mincome. Therefore with such enormous amounts being involved in subsidies, it should be important to all levels of government to ensure that projects containing two or more phases of development are not keeping artificially low rentals on the earlier sections and loading costs on to the public purse by way of excessive subsidies on later stages. Some system of internal project subsidies could well be implemented where differentials are, say, more than 20 percent.

TABLE IVRentals as a Percentage of Elderly Income

N = 344	<u>Projects Occupied</u>	
	<u>1973</u>	<u>1974 - 1976(incl)</u>
Rent under 25 p.c. income	78%	8%
Rents over 25 p.c. Mincome	<u>22%</u>	<u>92%</u>
	<u>100%</u>	<u>100%</u>

(f) Miscellaneous ConcernsI. Cooperatives

There is one cooperative for seniors at present. The rents range up to about 54 percent of Mincome and, although it is not known how many have private means sufficient to afford this accommodation, there is some danger that this project could run into financial difficulties if others not so involved with the spirit of cooperative sacrifice cannot be found to replace those departed. This particular project was not on the list for a visitation, and little is known of its management.

II. Care

Five care-hostel facilities were inspected. Such places are regulated by Provincial Community Care licensing regulations which specify size, shapes, and staffing requirements, so management post-commitment is of no concern to housing funding authorities. Indeed, since the operation of care facilities is now so obviously out of the hands of voluntary societies and removed from effective control of the federal agency which provides capital, it seems extremely anachronistic in 1978 for C.M.H.C. to fund care of any sort. This argument is strengthened by the fact that since bulk funding, which includes capital, is to be available to the Provinces through the Federal Department of Health and Welfare, funding for similar purposes should not also come through the medium of C.M.H.C.. In addition, since Provincial regulations no longer distinguish between rich and poor when it comes to the provision of care, and the N.H.A. preferential funding is supposedly oriented to lower incomes, funds are being channelled to those outside the limits specified in the operating agreement.

III. Safety

Two major concerns to residents are security and communication in case of emergency. Three projects only (excluding the care projects) had smoke detectors, and only two of them had detectors installed in the individual units. Only one project had a pull-switch arrangement to the manager's suite in case of emergency but many residents referred to the fear they felt of falling in

their suites and dying for lack of attention. There were enough stories about this very matter to indicate that it remains a real problem.

## 5. CASE STUDIES

The first of the following three descriptions is fairly representative of most facilities for the aged. The second is an example of the operating headaches produced as a result of a poorly designed and poorly constructed building, and the third is an extreme case of poor management, but the information on which it is based is from the file and has not yet been verified. As noted above, the investigator was requested not to visit this project as it is receiving attention from both the Ministry of Housing and C.M.H.C.

### Case I

In Nanaimo there is an 82 unit project completed in 2 phases, and sponsored by a service club. The project is at some distance from the club's headquarters and there appeared to be some lack of familiarity with the precise details of the project. As the Board members mentioned, the project is supervised by an on-site manager and he looked after all the "beefs". He is given a free bachelor apartment plus \$300 per month to keep the place neat, tidy, handle minor grievances. Heavy work, such as grounds maintenance is contracted out and is governed by a buildings committee.

According to the Board the previous manager had neglected maintenance, and had alienated the tenants. This was substantiated in the interview with the manager who referred to his predecessor's military-like authoritarianism. But he also blamed the Board for similar attitudes and their predilection for neatness, tidiness, and restrictive views on what residents could or could not do in and out of their units.

There is no recreation facility, and no craft or activity room where people could fix or make things, and no extra storage. Units tend to be more cluttered than in projects where storage is provided.

The manager has converted a tool shed into a workshop and allows the tenants to use his tools. It gets full usage and provides a socialization alternative to the neighbouring beer hall and chinese grocery (which he accused of "gouging the old folks"). Alternative shopping is too far, few have cars, and there is no public transportation.

The main problems appear to be as follows: (1) too wide a differential in rents creates dissention amongst the tenants, (2) insufficient maintenance funds; the figures set up by C.M.H.C. are said to be too low, (3) the lack of storage, recreation and activity space in view of the distance from community activities, shopping and the like, creates some hardship, (4) stoves and refrigerators are old and need replacing; parts are getting difficult to obtain; no regular replacement policy is in place, nor is there a painting policy, (5) a repressive atmosphere described by the manager as "prison like".

There are, in the project's favour, an efficient bookkeeping system, a healthy credit balance, a regular revaluation for insurance purposes, and an orderly notification procedure for rental increases.

## Case II

The seven storey high rise for seniors in Mission is managed by a typical hardworking, concerned group which hires a middle aged couple for Janitorial work. There is an amicable and clear working relationship between janitor and Board but it is clear that because of a poor building the janitor must perform tasks in complexity way beyond what a salary of \$250 p.m. would suggest as being requisite compensation.

The building is strategically located on a hill close to the town centre, with a commanding view over the valley. It is masonry construction with expensive-looking nooks and crannies, an imposing entrance which is non-functional, unless the funnelling of wind into the building is considered a suitable method for ventilating the corridors. Although the project is only 3 years old, the carpeting in the lobby has had to be replaced, \$10,000 expended re-doing plumbing and electricity and an unusually large number of stoves and fridges, which are all of a cheap variety, repaired. The maintenance fund of \$7,000 p.a. is exhausted and the Board is reluctant to dip into the replacement fund of about \$20,000 so early in the life of the project. There is evidence of water damage from leaking windows and on wet, blustery days rain and snow blows into suites by way of the sliding windows. The janitor says he spends a lot of time in winter helping the less agile move their belongings from near the window and it is not an uncommon sight to find residents sitting in their overcoats in their own units.

The roof leaks. The roof of the mechanical room lets water drip on the electric panels. The basement drains are inadequate and there are leaks there. The plumbing has plugged up seriously at times and once a whole section of piping fell out. The emergency generator is not powerful enough to operate the elevator and it is not clear how the most feeble could be evacuated should the power go out and the heat and light fail.

There is evidence of electric faults. A length of wire from the mechanical room with its insulation baked-off was donated to demonstrate the danger of working in that area. The boiler pipes need constant descaling and pumps are giving trouble. The corridor lights keep burning out and the cablevision wire on the top of the building is corroding.

In the suites, toilet seats pinched and had to be replaced. So had the plungers. Many thermostats were defective, some cabinets are substandard and there are numerous plaster cracks.

The above litany of problems would indicate that short-changing the project at the construction stage merely means high operating costs later. It also suggests that there were insufficient controls on the contractor and his materials.

The Board of Management for this project was, and remains, inexperienced. It failed to "ride herd" on the architect, and had no method of correlating subsequent management with design or materials chosen. Saddled now with overwhelming bills, the society must seek further rehabilitation funds from government. This in turn will lead to higher rents and higher government subsidies. The project is without sufficient parking and extra Government funds are being requested to purchase adjoining land for this purpose.

Already the 10 percent rent increase has caused criticism and grist for newspapers. It will take only a little more inconvenience and cost to the residents to elevate this project towards the top of the trouble charts.

### Case III

A project where the tenants are told to shut-up or get out, which is described by a visiting social worker to be a penal establishment, where sinks and toilets back-up into the apartments, where ovens which do not work are not repaired may possibly be said to have management problems. According to the file there is a "belligerent, officious manager", who terrorizes the inhabitants. He has closed the chapel and the recreational room and disallowed birthday parties and singing.

Judging from the letter of the daughter of one of the residents to a Provincial official, residents are afraid to speak-out, or even ask for essential repairs. In one suite the sink-stopper had to be forced down with a piece of wood wedged under a nearby cabinet to stop upstairs dish water from entering. The intercom was out for two weeks, and some toilets did not flush.

This project has an ethnic emphasis and while not all residents are from a European background, the society goes out of its way to retain its ethnic character. It will require considerable skill, patience and tact to resolve problems in this case.

## 6. CONCLUSION

Occasional extravagances and development costs higher than those encountered in the public and private sectors are admirably offset by economical operating costs during the life of the projects. Where the policy remains to segregate elderly people in housing enclaves designed specifically for the aged, utilizing non-profit societies remains the most effective way of doing so.

It is effective not only because of the cost efficiency, but because the casual way in which some societies operate undoubtedly imparts more of a household flavour to projects if they were administered by a tightly controlled, professional private or public agency. As it is generally considered that a homelike atmosphere is a primary objective in institutional housing, that certain lack of control over a project which is fairly frequently encountered in non-profit societies, has a positive side to it. For instance, while the regulations may specify no pets or overnight visitors the fact that the housing committee or Board keeps at arms length from the project, permits it to turn a "blind eye" to such matters.

Smaller projects containing less than 40 units, typically do not contain resident managers, and it is in these projects where one encounters the least slavish adherence to the rules. A regimented atmosphere found in projects larger than this is partly occasioned by the need for more methodical project control and partly by the presence of the sobering influence of traditional management. It is impossible to judge (from this study at least) whether there is more or less consumer satisfaction in the more or less controlled milieux.

Tentative conclusions have been reached with respect to cost-effectiveness. From rental information from 1975 and 1976, there would seem not to be economies of scale: bigger projects are not cheaper for the consumer (nor the Government) than smaller ones, and if it is true that smaller projects contain a more contented clientele, and have less managerial problems, growth of housing for the elderly should be through more, smaller facilities, than fewer larger ones.

That this study has discovered problems of various sorts in half the projects would suggest that there is need to continue the investigation further. It is obvious that findings based on so minute a sample would be subject to contradiction in part or in whole were a larger number of projects to be surveyed. This study was launched to test whether there were, indeed, widespread management problems, and it has identified that problems fall into categories restated as follows:

1. Maintenance and Repair caused by action or non action of management.
2. Maintenance and Repair resulting from construction or design.
3. Relationship problems such as manager to Board, manager to tenants, Board - C.M.H.C.
4. Miscellaneous, e.g. vacancies, routines inadequate, non adherence to C.M.H.C. agreements.

If this study were to enter a second phase, it would be worthwhile selecting a comparable group of older and newer moderate to large size projects, and doing a more deliberate analysis of a larger sample, utilizing a refined questionnaire to ascertain how many show evidence in each of the categories above. The results would be of use from the point of view of charting what further consultative activity is required but also to "get a handle" on the size of the rehabilitation budget for the coming years in this portfolio.

The second area for further work concerns cost-effectiveness. It has been tentatively, hesitantly and cautiously advanced that contrary to general belief, that smaller projects are not only cheaper per unit to build but their occupants are more contented. The result is less costly to operate and less troublesome projects to manage than larger ones. If this is the case, housing authorities will want to fund only smaller entirely self-contained projects. Unfortunately, this policy will run counter to the view that mixed self-contained and care is desirable, from a social and from a health point of view, and that the optimum size for a care home would be in the 60-80 bed range. Here is rich material for a combined research and policy piece the results of which could be of assistance to C.M.H.C. and the Province in charting future housing policies with respect to the aged.

The third area for further work is for C.M.H.C. to combine mortgage administration inputs into design and development procedures in a more deliberate way, and to ensure that adequate information and explanations regarding routines and operating agreements are given and management plans are worked out prior to rent-up. Recommendation #3 refers. It is estimated that it would take three weeks to flesh-out the management plan in Appendix "D" from existing materials.



All discussion so far has been with respect to non-profit or limited-profit accommodation for the elderly. A further 100 or so non-profit projects and limited dividend exist for families, mentally and physically handicapped, offenders, alcoholics, universities, single men and single women. This portfolio is known to be shot-through with financial, social, managerial, and conceptual problems and which, when they get out of hand, are dealt with on an ad hoc basis. Now may be the time to examine if at least some of these problems could be brought under control by attention to improved management procedures and education.

## 7. RECOMMENDATIONS

- I. Before transmitting to the M. & P. Department C.M.H.C. Branch offices to record on the file cover the project address, the society contact and the appropriate phone number. This would simplify contact and follow-up. A number of addresses were incorrect and box numbers are not helpful in tracking down projects or their managers.
- II. That C.M.H.C. and the Ministry of Housing conduct periodic refresher courses regionally for its approvals staff to review latest design and behavioural postulates on aging. It is distressing to find the most elementary mistakes still being made in size, unit, landscaping, siting and choice of materials.
- III. That C.M.H.C. as a priority assemble a kit of sample forms and guidelines along the lines of the "Management Plan" in Appendix 'D'. This would greatly assist new societies of all kinds in preparing their management controls. In addition, a "self-audit" should be prepared and distributed to assist existing groups to assess whether the management of their projects is adequate.
- IV. That the two management aides referred to above be added to the book "Accommodation for Seniors" which should be now updated and reprinted to include the community care material. Supplies of these should be maintained at Provincial and C.M.H.C. offices, and advertised.
- V. That a national C.M.H.C. task force be struck to investigate the longevity of wooden roofs with particular reference to western shingles and shakes, and recommend on bird proof nails, crows and other pestilential mauraunders.

QUESTION SCHEDULE FOR ON-SITE MANAGERS NON PROFIT HOUSING

Project \_\_\_\_\_

Address \_\_\_\_\_

Contact \_\_\_\_\_ Phone \_\_\_\_\_

A. To ascertain Manager's familiarity with Project \_\_\_\_\_

1. Do you know what sort of units there are?
2. Are they all the same design(s)?
3. What services are there for the residents in the community?
4. Are safety features installed?
5. How are emergencies handled -
  - (a) in project
  - (b) in community
6. Do you keep individual suite records?
7. What has your vacancy rate been during the last 12 months?
8. Do you do an inventory check on move-out?
9. Do your tenants sign acceptance forms (on move-in)?

B. For Information

1. How do you handle resident grievances?
2. Do you have a lease agreement?
3. Do you involve tenants in operation of project?
4. What social/rec. events are there for tenants?
5. How long do you allow a suite go unoccupied in the event of hospitalization etc.
6. Do you have rules for visitors, pets, noise?
7. Is there a routine check of tenants?

C. Records and Accounts

1. Is there a book-keeper?
2. If yes, to whom does she report?
3. What accounts/books does the manager keep?
4. How are rents collected?
5. Do you accept cash?
6. Is there an office where people can talk to management?
7. Is there an on-site Janitor/Supervisor?

cont'd.....

F. (cont'd)

4. Can you think of any improvements which could be made to improve the governing of the project?
5. Do you know what is included in the operating agreement with C.M.H.C.?
6. How could C.M.H.C. have helped group move -
  - (a) at the beginning?
  - (b) during the operation?

G. Questions for Interviewer

1. Qualifications of Board for job?
2. Control of finances?
3. Methodical maintenance?
4. Building and grounds in good repair?
5. Operating costs reasonable?
6. High vacancy or turnover? Reasons
7. Connection of Board to sponsor?
8. Did project have difficulties in the construction phase more than in its operation?
9. What C.M.H.C. assistance is most required in view of group?

RESIDENT QUESTIONNAIRE:

- Objective
1. To assess physical comfort of dwelling.
  2. Adequacy of maintenance.
  3. Responsiveness of Management and staff.

I. Introduction

1. Where did you live before?
  - a) own house
  - b) apartment
  - c) boarding house
  - d) other
2. What prompted you to leave?
  - a) better housing
  - b) more manageable unit
  - c) cheaper
  - d) better service
3. Do you find the size of your unit satisfactory for you?
  - a) yes
  - b) no
  - c) partially
  - d) other
4. Is the layout of your apartment convenient?
  - a) yes
  - b) no
  - c) partially
  - d) comments
5. Do you feel safe in this project?
  - a) yes
  - b) no
  - c) partially
  - d) comments
6. Is there sufficient room for entertaining people in your apartment?
  - a) yes
  - b) no
  - c) with difficulty
  - d) comments

cont'd.....



III. (cont'd)

2. Have you told anyone about them?
  - a) yes
  - b) no
  - c) whom
  
3. Do you feel at ease to approach management with suggestions or complaints?
  - a) always
  - b) usually
  - c) seldom
  - d) never
  
4. Are you satisfied with your lease?
  - a) yes
  - b) partially
  - c) no
  
5. Is there a resident's association?
  - a) yes
  - b) no
  - c) don't know

APPENDIX C

List of Projects

- (a) Letters sent  
(b) Visited

The Manager  
Cheam Golden Age Housing Soc.  
#104 - 2 Princess Ave. East  
Chilliwack, B.C. (a, b)

The Manager  
Agassiz-Harrison Senior Citizens  
Housing Soc.  
Box 292  
Agassiz, B.C. (a, b)

The Manager  
Abenezer Senior Citizens  
Housing Society  
33433 Marshall Road  
Abbotsford, B.C. (a, b)

The Manager  
Mount Hope Senior Citizens  
Housing Society  
551 Park Street  
Hope, B.C. (a)

The Manager  
South Amherst Housing Society  
7008 Balmoral Street  
Vancouver, B.C. (a)

The Manager  
Fraser Valley Ukrainian  
Senior Citizens Hsg.Soc.  
310 St. David Street  
Chilliwack, B.C. (a)

The Manager  
Parish of St. Paul  
1254 Pendrell Street  
Vancouver, B.C. (a)

The Manager  
Mission & District Senior  
Citizens Housing Society  
7338 Welton Avenue  
Mission, B.C. (a, b)

The Manager  
Seabird Island Indian Band  
Housing Society  
R.R.1  
Agassiz, B.C. (a)

Manager  
Counneran Senior Citizens  
Housing Society  
5939 - 180 Street  
Surrey, B.C. (a)

The Manager  
Sunnyside Villa Society  
15144 - 26 Avenue  
Whiterock, B.C. (a, b)

The Manager  
Park View Place Society  
Enderby, B.C. (a, b)

The Manager  
Kiwans Village Society of  
Vernon  
1504 - 37 Avenue  
Vernon, B.C. (a, b)

The Manager  
Shuswap Housing Society  
137 Hudson  
Salmon Arm, B.C. (a, b)

The Manager  
John Howard Society of B.C.  
2307 - 43 Avenue  
Vernon, B.C. (a)

The Manager  
Vernon Ukrainian Senior Cits.  
Housing Society  
3502 - 27 Avenue  
Vernon, B.C. (a)

The Manager  
Duncan Kiwanis Village Society  
159 Trunk Road  
Duncan, B.C. (a, b)

The Manager  
Kelowna Group Living Home  
Society  
831 Lawrence Avenue  
Kelowna, B.C. (a)

The Manager  
Cumberland Senior Citizens  
Housing Society  
186 Dunsmuir Avenue  
Cumberland, B.C. (a, b)

The Manager  
General George Pearkes Housing  
Society  
345 Wallace Street  
Nanaimo, B.C. (a, b)

The Manager  
John Perkins Memorial  
Housing Society  
#930 - 13 Avenue  
Campbell River, B.C. (a, b)

The Manager  
Howsmith Rest Home Society  
McMilliet Street  
Parksville, B.C. (a, b)

City of Duncan, Seniors  
(b)

The Manager  
Pioneer Village  
Ganges, B.C. (a, b)

Galiano Housing Society  
Galiano, B.C. (b)

## APPENDIX D

### Management Plan Outline

A comprehensive Management Plan will have the following elements:

#### Occupancy

- Advertizing Policy
- Screening Committee
- Procedures for certifying residents
- Policies for choice of tenant
- Eligibility worksheets
- Verification system
- Acceptance and rejection letters
- Waiting list
- Sponsor's statement
- Orientation material
- Suite check list
- Lease and house rules
- Security deposit policy and procedure

#### Rent Collection

- Rental roll and ledger
- Receipts or sign book
- Rent delinquency policy
- Rent supplement procedures

#### Human Relations

- Grievance and complaint procedure
- Security and safety policies
- Use of recreation, activity and craft rooms

#### Accounting

- Income and expenditure forms
- Authorities
- Financial control
- Petty cash voucher
- Employee accounts

cont'd.....



Staffing

- Duties
- Line of responsibility
- Contracts

Maintenance

- Janitorial stocks
- Worksheets, exterior, interior
- Inspection schedules
- Painting
- Emergency routines
- Garbage collections

Replacement

- Calendar for replacements
- Exterior
- Appliances
- Carpeting
- Emergency equipment