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For the month of February, 2002****Message from the Assistant Deputy Minister**

With the social housing transfers now more than half completed, both Service Managers and the ministry are looking to their new roles in the future.

The challenge for Service Managers is to manage your new social housing responsibilities effectively – within the authorities and limitations laid out in legislation and regulations, and in consultation with the housing providers who directly deliver the social housing services in your communities.

I'm pleased to see that Service Managers are working together, formally and informally, sharing information and best practices with their colleagues. Previous issues have highlighted the collaborative work being done by Service Managers in the Eastern region through the Seaway Group. Many similar initiatives are underway in other areas of the province. In Thunder Bay, the DSSAB is working with the other Service Managers in the Northwest – inviting them to training sessions, sharing templates they develop, and discussing their experiences. In the Southern region, the Brantford Service Manager has developed an electronic bulletin board to allow Service Managers from across the province to share documents and post questions. These two Service Managers are also benefiting from the experience of the providers in their communities. Read more about their initiatives in this newsletter, starting on page two.

As more Service Managers take on the administration of the social housing business, the ministry is addressing its new, more limited role in social housing. Earlier this year, the Ontario Housing Corporation Support Branch, which had provided services to OHC and the former local housing authorities, formally closed its offices. Residual OHC functions will now be handled by the ministry's Social Housing Branch. Further restructuring of the ministry's social housing business will be undertaken in coming months in response to the ministry's reduced role.

I encourage you to continue to form and maintain links with your municipal colleagues as you fully integrate the social housing business. There is a wealth of skill, experience, and innovation available among all of you.

Sincerely,

Lynn M. MacDonald
Assistant Deputy Minister
Social Housing Business Division

Tips and Strategies - Point of Transfer and Beyond...

Each month, this section will feature excerpts from interviews with Service Manager staff representatives who are now managing the social housing programs in their service areas.

Brantford

Brantford assumed responsibility for social housing in its service area in January of this year. The Brantford service area includes 18 housing providers plus the Local Housing Corporation. Rick Farrell, Director of Housing, talks about his experiences.

"Our approach to administration is to take our time; we're not in a hurry to change things. In many cases, there are defaults in the legislation, and in most cases we elected to go with the default positions. We didn't want to change things too much too quickly, then have to go back and rethink the things we changed. Our stakeholders agreed that taking it slowly made sense. For example, we didn't make any changes immediately to the priorities for access. We'll deal with that in consultation with our stakeholders.

"We set up a Transition Liaison Committee in Brantford more than a year ago. All providers were invited to attend, and we asked for volunteers for the committee. In addition to providers, a local legal clinic and some social services support groups are members.

"The Transition Liaison Committee meets monthly. We bring proposed positions on areas of municipal flexibility to them, usually about three issues a month. We've discussed topics such as asset limits, special priority categories, and occupancy standards. We email minutes from the meetings out to all providers. We're fortunate to have a fairly small group, and to be close geographically. We're able to react to situations much more

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quickly than if we were dealing with the whole province.

"We've also held open houses for stakeholders, including providers and tenants. [Brantford Social Housing Manager] Deb Ballak has done a fabulous job of getting community involvement.

"We're developing policy manuals that every provider gets – each provider has a binder that we're gradually adding to. We're also preparing training now, for our own staff, for property managers in the LHC, and for all providers. The provider training offered by the ministry provided some good material, but we want to give providers additional training on the legislation and regulations, as well as areas of municipal flexibility.

"One tool we're using is an Internet bulletin board that will allow us to share policies, training materials, and other documents with Service Managers across the province. At a meeting of Service Managers in Waterloo last November, we discussed sharing our work on procedures, reports, newsletters, etc. Thanks to Deb and the Brantford IT Department, we have a way to do that electronically."

[Note: Deb Ballak, Brantford Social Housing Manager, recently emailed all Service

Managers with information about the Brantford website's bulletin board, and provided a username and password for Service Managers' use. If you'd like further information, or another copy of that email, please email Deb at dballak@city.brantford.on.ca. Also note that the bulletin board, while password-protected, should not be considered totally secure.]

"The electronic bulletin board could be an effective tool if other Service Managers use it. After all, there's no sense in 47 of us doing the same research and writing what amounts to the same policy. At least we should be able to take into account what other people are doing."

Rick's advice to other Service Managers?

"Take your time. Take a cautious approach. Be patient. Develop policies and procedures that are supported by the community, think issues out well, and make sure all the parties involved can live with the outcome."

Thunder Bay

The Thunder Bay District Social Services Administration Board (DSSAB) assumed responsibility for social housing in its service area in January. The DSSAB includes 36 housing providers plus the LHC, a diverse portfolio of urban and rural providers scattered across a large area in north-western Ontario. Peter Boban is Program Manager, Social Housing Office for the DSSAB. He joined the DSSAB in July 2001 from the ministry's Regional Office in Thunder Bay, and now heads a team of five housing staff.

"We started involving housing providers in the process with the development of our Joint Local Transfer Plan. We invited them all to give us input, and at key points, we've held meetings for all stakeholders [providers] to make presentations about what we're doing.

"We set up a Social Housing Committee with representatives from the different providers – private non-profit, municipal non-profit, federal non-profit, and the LHC. We made sure we had representation from the district [the areas of the DSSAB outside the City of Thunder Bay] as well as city providers. Getting input from the people that actually work in the business every day has been important.

"The Social Housing Committee meets to review policies for the areas where the Service Manager has discretion. The meetings are a way to get both input and buy-in for the process.

"We're currently organizing RGI [rent-gear-to-income] calculation training for all providers in February. Once the ministry has finalized the processes, we also expect to train providers on the funding model, benchmarking, and year-end settlement. We plan to use data specific to our own area and providers when we do the training.

"We're also working with the other Service Managers in the north-west – the Rainy River and Kenora DSSABs. We invite our counterparts to training sessions, share templates we develop for things like budget and AIR [annual information return] packages, and discuss our experiences. We've also discussed the potential for our DSSAB to provide operational review services to Rainy River and Kenora.

"The LHC remains intact as a provider with the DSSAB as sole shareholder. Two of the DSSAB board members have been cross-appointed to the board of the LHC, which increases knowledge of social housing issues for the DSSAB.

"The LHC in Thunder Bay already manages several non-profits in the area. We're talking to some of the more remote urban native housing projects about the opportunity to piggyback on the LHC for tendering some work. There's an opportunity to take advantage of economies of scale in purchasing some goods and services, such as painting work.

"We've delegated responsibility for coordinated access and waiting list management to our LHC, which also provides technical services for the DSSAB's social housing office.

Peter's advice to other Service Managers?

"Communicating with your stakeholders is key. Make sure everyone knows what the process is, and what end result you want."

Training Wraps Up

Ministry training for Service Managers wraps up at the end of this month. More than 500 staff from Service Managers across the province have

attended one or more of the nine social housing training modules since the pilot training began last summer.

One-day training sessions for housing providers will also conclude in mid-March. To date, more than 1,000 participants (representing staff from over 500 different housing providers, along with municipal officials and Service Manager staff) have attended the provider training sessions.

Regulation Round-up

Chart on Ministry Website

For a quick reference to new and amended regulations under the *Social Housing Reform Act, 2000*, the ministry has posted a chart on its website at http://www.mah.gov.on.ca/business/SHT/SHR_A_Reg/shrareg-chart-e.pdf listing all the amendments to each regulation. This chart is updated weekly as regulations are amended. Current links to individual consolidated regulations and amending regulations are included in the chart.

New Social Housing Services Corporation Regulation

A new regulation dealing with the Social Housing Services Corporation has been published in the February 9th issue of the Ontario Gazette. It is available on the gazette's website at www.ontariogazette.gov.on.ca.

Correction

There was a data entry error in the recap of amendments made to O. Reg. 298/01 in the December issue of *Service Manager Update*. Please note that in reference to changes made to rent scale amounts for Ontario Works recipients, the dollar amounts listed in the Update were inadvertently transposed. The correct rent for a benefit unit size of 4 should read \$269 (not \$296); similarly, the non-benefit income limit for a benefit unit size of 12 or more should read \$2,117 (not \$2,177). The figures in the amending regulation itself are correct; they were simply entered incorrectly in the Update.

Service Managers are reminded that the legislation and regulations are the authority, and should be consulted in case of any questions or perceived disparities. Guides and other publications referencing the Act and regulations are provided for information purposes only; they should not be viewed as a legal source nor relied upon in matters requiring statutory interpretation.

Transfer Tools - Website

The ministry's website contains valuable information for Service Managers, including copies of many transfer-related documents. Here's what's posted on the site:

NEW: Guide to Rent-Geared-to-Income Administration

Regulations under the *Social Housing Reform Act, 2000* (a reference chart with links to sites containing the complete regulations)

Frequently Asked Questions (questions - and answers - for Service Managers on questions they've asked the ministry)

Service Manager Update (all issues are posted, from October, 2001 to present)

Social Housing Business Transfer: Guide for Service Managers (the original guide to transfer for Service Managers, plus all addenda and implementation guidelines that supplement the information in the guide)

Recent additions include:

- Release 16, the *Guide to Rent-Geared-to-Income Assistance*

Upcoming releases:

- Release 17, the *Guide to Special Needs Housing*
- Release 18, the *Operating Framework Guide*

Municipal Service Manager Training (information about modules, schedules, and registration) **Guide for Non-Profit and Co-operative Housing Providers** (the original guide to transfer for providers, plus all related addenda and implementation guidelines)

Guide for Local Housing Corporations (the original guide to transfer for local housing corporations, plus all related addenda and implementation guidelines)

Guide to Social Housing Reform (a summary of social housing reform, from October 2000)

Transfer Tools - "POSH"

Since transfers began, the ministry has issued federal program data (including both hard and electronic copies) as "Implementation Guideline

Release 12". Each release was customized for the Service Manager – based both on their individual service area data, and on the version of "POSH", the ministry's software used to administer the federal programs.

Below is a chart showing the different versions of POSH, and the corresponding releases.

Release 12 Oct 01 (12 - POSH & 12B - Excel)	This release was for service managers, at initial point of transfer, from Oct 01 to Jan 02, and provided upgrade information from POSH 1.0.8 to POSH 2.0.0.
Release 12 (Revised) Jan 02 (12 - POSH & 12B - Excel)	This release was for service managers, at initial point of transfer, and only distributed to service managers transferred in Feb 02. This guideline upgrades information from POSH 1.0.8 to POSH 2.0.5.
Release 12 (Revised) Feb 02	This release will be for service managers, at initial point of transfer, with transfer dates of Mar 01 or later who have opted for POSH. This guideline (Feb 02) upgrades POSH 1.0.8 to POSH 2.0.6.
Release 12B (Revised) Feb 02	This release is for service managers, at initial point of transfer, with a transfer date of Mar 01 or later who have opted for Excel with no POSH. This guideline (Feb 02) refers to POSH 2.0.6.
Release 12C Feb 12	This release is for service managers transferred between Oct 01 and January 02 who opted for POSH and will need upgrade from 2.0 to new version 2.0.6.
Release 12D Feb 12	This release is for service managers who transferred between Oct 01 and January 02 who opted for Excel without POSH. They will not need an upgrade of POSH 2.0.6, but should get an updated data dictionary, Code tables, Volume estimate, etc.
Release 12E	This release is for service managers who transferred in Feb 02 who opted for POSH and will need upgrade from POSH 2.0.5 to version POSH 2.0.6. This release will only contain Install set & Source code. NOTE– service managers who transferred in Feb 02 who opted not to receive POSH do not require and updated information.

Frequently Asked Questions about Federal Programs

Here are the answers to some questions about the federal housing portfolio that ministry staff have been hearing from Service Managers.

Q1 Who calculates the low end of market rents for federal programs---MAH or the Service Manager?

A1 Low End of Market (LEM) rents will not be supplied by the Ministry. Service Managers can set their own LEM rents or follow the Ministry's approach of applying rental increase guidelines to existing LEM rents.

Q2 How are cross-border issues with federal groups being handled?

A2 Generally, if a federal housing provider has projects in multiple service areas, and each of these projects are separate entities (i.e., there are separate operating agreements for each), then administration and funding for each project is now the responsibility of the Service Manager in whose service area the project is located. Instances where the segregation of project boundaries is more complex (i.e., where two or more units share an operating agreement) are dealt with on a case-by-case basis.

Q3 Federal payments are paid quarterly; however, some transfer dates are occurring between quarterly transfer payments. Is there any risk that Service Managers will not receive the portion of federal payments due to them as a result of transferring prior to a quarterly payment date? That is, what are the plans for flowing federal funds to those Service Managers who don't have a transfer date that coincides with a quarterly federal payment date?

A3 A point of clarification: the federal funding payments referred to in the question are the stage-two quarterly payments for the non-profit and co-op housing portfolio---not the stage-1 quarterly payments for the public housing stock and commercial rent supplement units. Federal funding payments associated with the stage-one transfer have flowed to Service Managers since they assumed administrative responsibility for the portfolio on January 1, 2001.

If a Service Manager has a stage-two transfer date that does not correlate with a transfer funding payment date, the funds will be adjusted so that the funds are apportioned accordingly. There is no risk that a Service Manager would not receive the portion of federal payments due to them as a result of differing transfer dates.

Q4 If a federal provider needs money for capital repairs, can they approach their Service Manager to have the required funds appended to their mortgage?

A4 The provider can approach the Service Manager to have the funds appended to their mortgage as a second mortgage. This, however, is considered a further encumbrance to the property, and any encumbrance will require Ministry approval as per the conditions outlined in the Federal Addendum.

Q5 Federal projects appear to have more autonomy. Does this mean the exposure to risk is greater?

A5 Federal projects remain bound by the terms and provisions outlined in their operating agreements, originally entered into by CMHC and the housing provider. Service Managers are responsible for monitoring and ensuring that these projects act in compliance with their individual operating agreements.

Q6 One-time funding was provided by the federal government to Ontario under the Social Housing Agreement to cover the risks that may be associated with the future increases in costs of the federal programs. These funds are now being transferred to the municipalities as a result of downloading. Does this mean that Service Managers will assume the risks that may be associated with federal projects?

A6 The SHRA transfers the responsibility for the funding and administration of social housing projects in a Service Manager's area under the housing programs associated with those projects. This includes the federal housing programs.

The Ministry is also transferring, through transfer orders, the operating agreements with the federal housing providers and all the obligations that were CMHC's and are currently the province's with respect to those agreements. The rules with respect to transfer orders are in Part IV of the SHRA.

A Service Manager's liability with respect to the federal projects would be the same as CMHC's was. The Service Manager is responsible for paying subsidy to federal providers under the terms of the existing operating agreements.

As CMHC has insured the mortgages on all the federal projects, they are responsible for covering defaults. Since they have transferred these programs to Ontario, the costs associated with mortgage defaults have also been transferred to the province. The province, in turn, may transfer these costs to service managers. There are provisions in Part VII, the billing part of the SHRA, which allow the Minister to bill these costs back to Service Managers if this is determined to be appropriate.

Regular editions of *Service Manager Update* are published each month by the Ontario Ministry of Municipal Affairs and Housing to summarize important information that will assist Service Managers with the social housing business transfer.

Special editions will be published, if required, to provide Service Managers with time-sensitive information.

For more information, please contact your Area Transition Team.

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