



**Taber & District
HOUSING FOUNDATION**

Business Plan

2026 - 2028

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EXECUTIVE SUMMARY

“TDHF provides individuals, families, and seniors with affordable and caring accommodation”

TDHF Mission Statement

During Strategic Planning sessions, the Board affirmed the vision *“that no one in need will be without access to safe and affordable accommodation”*.

The Board re-affirmed strategic goals of:

- Provide quality housing, infrastructure, and care for residents
- Demonstrate effective leadership and operations
- Foster community engagement and partnerships
- Implement sound financial and fundraising practices for organizational self-sufficiency

These goals will form the basis of the coming years of operations.

Taber and District Housing Foundation was incorporated by Ministerial Order “H”, as a Management Body on January 1, 1995 (190/94, dated December 20, 1994). It was formed from the consolidation of five (5) former Management agents and replaced the organizations in the operation and administration of social housing.

The majority of TDHF’s portfolio is in Taber, AB; however, we also provide accommodations in other surrounding communities – Vauxhall, Barnwell, and Grassy Lake. In smaller communities, residents living in rural municipalities generally prefer to remain living in their hometowns. However, the communities surrounding Taber have steadily lost services (i.e., medical, pharmaceutical and grocery) and, as a result, there has been a noticeable trend of vacancies in the housing units. TDHF will continue to explore methods to reach our strategic goals. Should vacancy rates continue to increase in the surrounding communities, TDHF will investigate the possibility of consolidating Social Housing units in Taber.

The Foundation understands that the local community has unique needs and requests regarding the Clearview Lodge; primarily that seniors be allowed to remain in their home community. We are a large employer in the Taber community and the expectation is that we will provide housing and services to senior citizens to allow them to age in the community, rather than having them move to Lethbridge.

In 2014, TDHF completed a renovation project at Clearview Lodge which expanded the dining room and modernized the kitchen area. This renovation was the first of several phases to update and expand the Clearview Lodge. This project was funded through Alberta Infrastructures Capital Emergent Project (CEP).

A review of the vacancy rates and the composition of the waiting list suggest that the wants of our residents are changing. It appears that potential residents are reluctant to move into units that are smaller in size or do not have a full bath. Smaller units are especially a concern when trying to arrange

accommodations for couples. Discussions with other local HMBs suggest that smaller rooms eventually lead to much higher vacancy rates and reduction in operating revenues.

Modernization and renovation at Clearview Lodge will address the ability to offer couples rooms or suites and increase the size of all rooms to also include a full bathroom. These phases will allow TDHF to offer all Taber and community seniors a modern facility that can offer a full range of amenities. The Foundation shall seek funding from the Government of Alberta to assist in the planning and design stages and construction (**Appendix E – Capital Priorities**).

As the Housing Management Body responsible for managing six ASHC-owned self-contained apartment buildings, it is our responsibility to oversee the effective use and continued viability of these government-owned properties. Most of the self-contained apartment buildings were constructed in the 1980's, but the oldest building was constructed in 1978. These buildings have waitlists of low-income seniors still wanting independent living. TDHF needs to consider asset transfer opportunities (assume ownership from the Province of Alberta) and plan capital renovation projects that ensure the continued viability of these buildings, and allow the units to remain desirable options for senior clients (**Appendix F – Asset Management**). These projects will include mechanical systems upgrades, repair and replace asphalt parking lots, and caseworks, flooring, and windows upgrades. TDHF will also seek approval from for capital funds to completed suite renewals (**Appendix D – Capital Maintenance & Renewal**).

While our Board of Directors recognizes that TDHF's primary customer is low to moderate income seniors, we must determine if there will be a significant future need in our area for housing catering to low-income seniors. The Foundation has committed to provide affordable housing, and therefore the questions of "what is affordable?" and "what are the housing expectations of seniors?" will need to be investigated and answered. At the same time, we must remain focussed on sustainability. This information will aid the Foundation as we continue to evolve in the future. Cherry & Main Affordable Apartments is seen as a means of providing affordable housing for Taber and area residents (**Appendix E – Capital Priorities**).

Community Housing units are primarily located in Taber. The wait lists for housing in Taber have consistently grown; however, vacancy in the surrounding communities has been less consistent. As the primary customer is low income, single parent families, tenants are reluctant to reside in areas where there is lack of access to services. The Foundation will continue to review vacancy rates in the surrounding communities and ensure that the units continue to be sustainable.

The bulk of the Community Housing units (Phase 1 – Taber) were constructed in the 1970s, while others were constructed in the 80's and early 90's. The Foundation will seek approval from Government of Alberta for capital funds to ensure continued viability of the properties. The focus of capital projects will be on upgrading building envelopes and upgrading interiors. Several units will require replacement of windows. Finally, several units are due for upgrading of interior flooring. These improvements will ensure that the properties continue to offer a safe, clean and energy efficient dwelling for our tenants.

The Foundation is aware that our client expectations are changing; seniors are remaining in their own residences longer, are living longer and want/need more amenities. We recognize that many of our facilities are older and needing repair or may not meet the resident's needs as effectively as they once did. Additional challenges for infrastructure come from low vacancies, though a few facilities sometimes face occupancy challenges. It is an exciting time to see what changes can be made to serve our communities better. We believe we can achieve organizational sustainability by optimizing our facilities through expansion and renovation, improve our service levels while also addressing staff safety and satisfaction.

ACCOUNTABILITY STATEMENT

The business plan was prepared under the Board's direction in accordance with legislation and associated ministerial guidelines, and in consideration of all policy decisions and material, economic, or fiscal implications of which the Board is aware.

Approved by the Board on June 26, 2025.

Rosanne Horrocks
Chair, Board of Directors

Board of Directors

Jake Hiebert, Village of Barnwell

Russell Norris, Town of Vauxhall

Rosanne Horrocks, Member at Large

Tom Machacek, Member at Large

Tamara Miyanaga, MD of Taber

Daniel Remfert, Town of Taber

Joe Strojwas, Member at Large

INSTITUTIONAL CONTEXT

Vision:

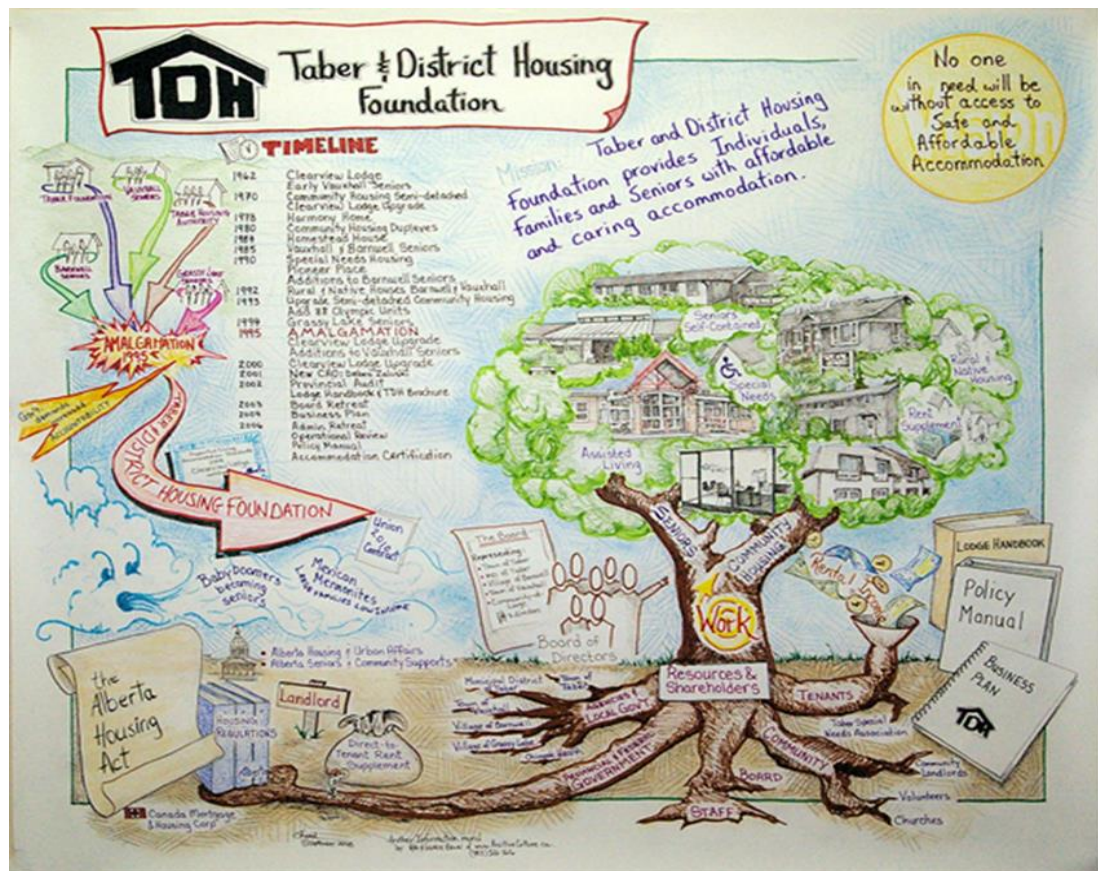
No one in need will be without access to safe and affordable accommodation.

Mission:

Taber and District Housing Foundation provide individuals, families and seniors with affordable and caring accommodation.

Values:

- Respect for individual rights
- Wellness and independence of the individual
- A compassionate, safe environment
- Being financially responsible and community-focused
- Open and honest communication
- Integrity, fairness and commitment



The Organization

Ministerial Order Number 'H' incorporated Taber and District Housing Foundation as a Management Body on January 1, 1995, 190/94, dated December 20, 1994. It was formed from the consolidation of five (5) former Management Agents, and replaced the following organizations in the operation and administration of social housing within its designated boundaries:

The Taber Foundation
The Taber Housing Authority
The Vauxhall Senior Citizen's Housing Society
The Village of Barnwell
The Village of Grassy Lake

Taber and District Housing Foundation is comprised of the following member municipalities,

The Municipal District of Taber
The Town of Taber
The Town of Vauxhall
The Village of Barnwell

and is empowered to requisition operating funding from its members for the purpose of providing Senior Citizen's Lodge accommodation:

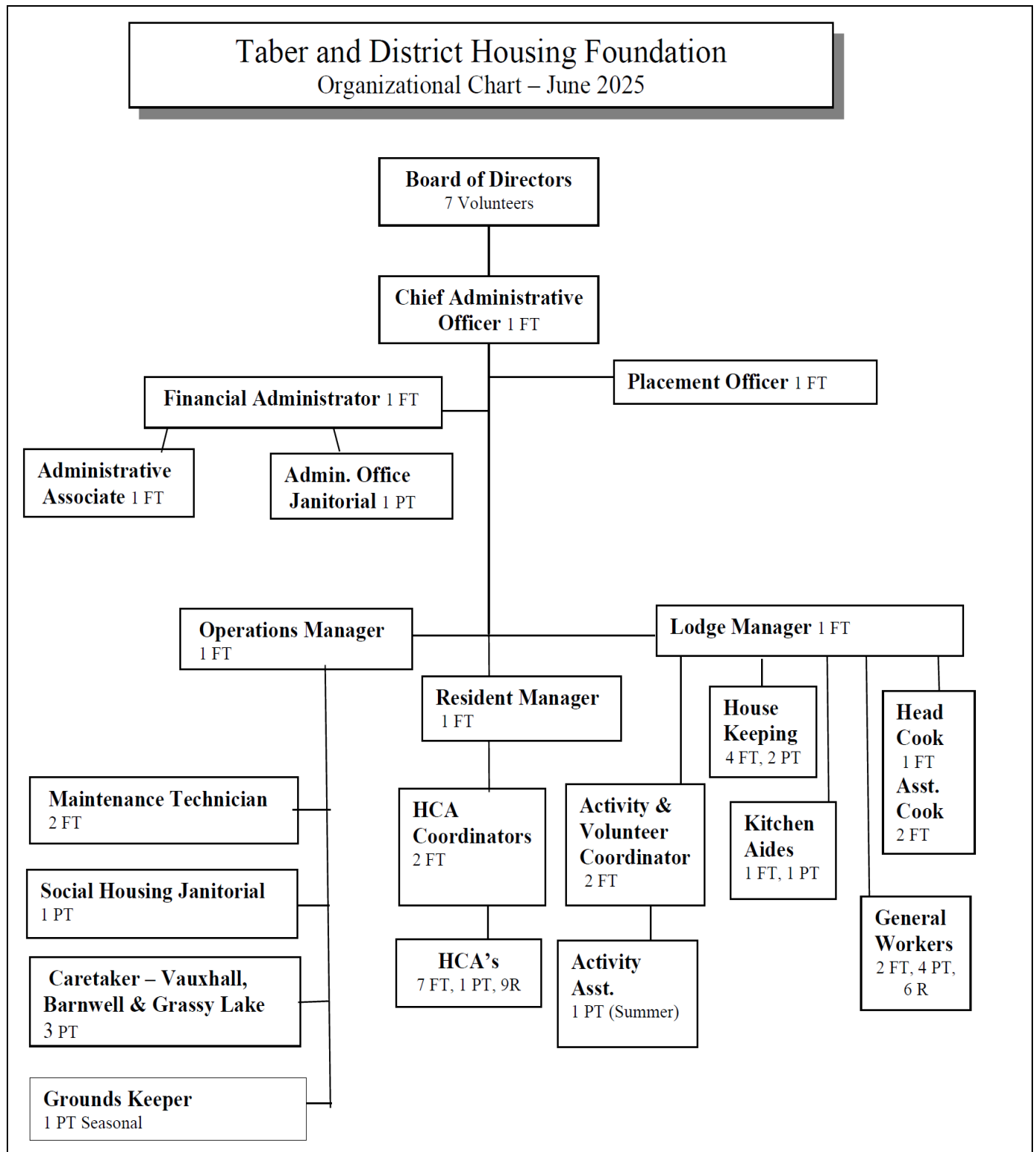
The Board of Directors is comprised of one (1) elected councillor from each of the member municipalities, plus three (3) members selected from the Community-at-Large.

A Chief Administrative Officer, who reports to the Board of Directors, administers the day-to-day business operations of Taber and District Housing Foundation. Reporting, in turn, to the Chief Administrative Officer are:

- Lodge Manager, Clearview Lodge
- Resident Manager, Clearview Lodge
- Operations Manager
- Financial Administrator
- Placement Officer, Social Housing

In addition, thirty (30) full-time and thirty-three (33) casual and part-time staff report to the Lodge Manager(s) of Clearview Lodge, in meeting the daily operational requirements. There are also (2) full-time and (3) part-time staff reporting to the Maintenance Manager and one (1) full-time and one (1) part-time staff reporting to the Financial Administrator. Refer to page 25 for the current organizational structure and staff reporting lines.

Corporate Profile – Organizational Chart



The Scope of Operations

The mandate of Taber and District Housing Foundation is to operate under the Alberta Housing Act and related legislation and regulations. Its primary purpose is to administer and maintain a portfolio of comfortable and affordable residential housing units for the benefit of Albertans to whom the various social housing programs are targeted. Taber and District Housing Foundation owns Clearview Lodge, while the Province of Alberta owns the remainder of the portfolio.

Annual operating funding is obtained by two (2) different means:

The Board of Directors approves the annual operating budget for Clearview Lodge. Revenues are generated by the provision of Accommodation Services to residents of the Lodge, by contracted funds from Assisted Living Alberta to offer continuing care services, by grant monies contributed by the Province of Alberta through the Lodge Assistance Program, by requisition from member municipalities, and through any other appropriate means of fund-raising.

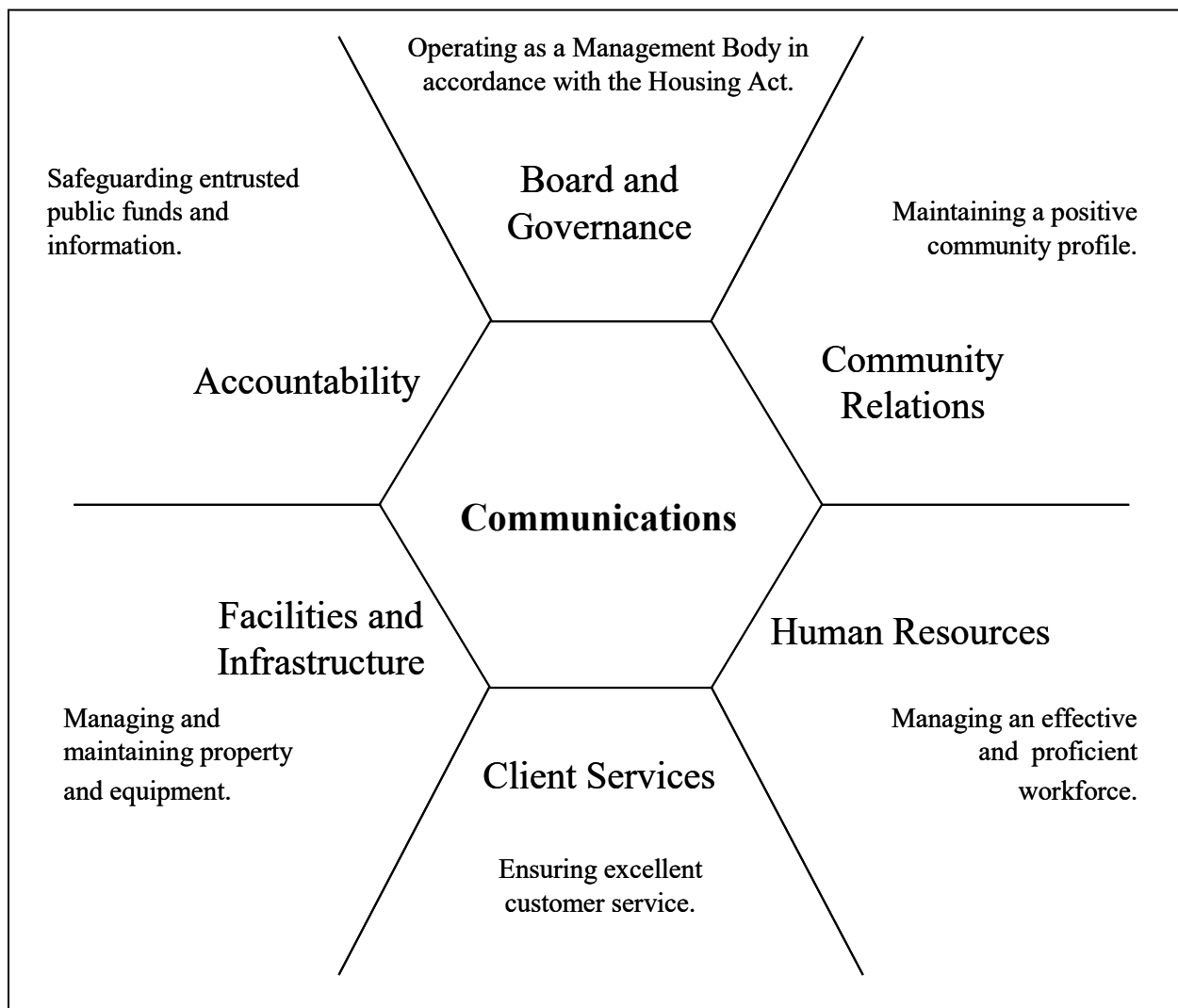
For the remaining portfolio, the Province of Alberta, through Assisted Living and Social Services, formally approves the annual operating budgets, on a project-by-project basis, in response to the Board of Directors' recommendations. Such budgets in recent times have reflected the Provincial Government's objectives to maximize revenues and minimize expenditures, while continuing to provide efficient administration and maintenance to the projects.

The operation of Social Housing in Alberta is governed firstly by the Alberta Housing Act, and then, in many ways, by the accompanying or related Acts and/or Regulations. Most such matters are documented in the Management Body Handbook, issued by Housing Management Body Operations.

Therefore, a Management Body such as Taber and District Housing Foundation is mandated to adhere to such requirements, and to ensure consistency and impartiality in the application of Program Principles. In essence, this means that, while the Board of Directors may feel that local conditions may warrant significant flexibility in the application of tenant eligibility criteria; for example, their ability to act on their convictions may be subverted by the applicable Rules.

Operations Diagram

There are 7 main functional areas within the operations of TDHF Foundation. The illustration below delineates these areas using the outer portion of the diagram. The 'hub' of the diagram contains "Communications" as this area is key to the smooth interaction among the other areas. Each area is addressed separately in this plan, beginning with 'Board and Governance' and continuing in a clockwise direction and ending with 'Communications'.



Board and Governance

Governance

Taber and District Housing Foundation operate under the guidance of a Board of Directors that is made up of 7 individuals who meet monthly. One elected councillor from each of the member municipalities comprises the Board: MD of Taber, Town of Taber, Town of Vauxhall, and the Village of Barnwell (appointed annually by their Councils).

A further 3 members appointed by the Board, are selected from the community at large (two-year terms – max. of 3 consecutive terms).

The Board hires the Chief Administrative Officer (CAO) to manage the day-to-day operations of Taber & District Housing Foundation.

PLAN DEVELOPMENT

Development of our business plan included input from various stakeholders and sources. In 2018, TDHF partnered with the Town of Taber, and the MD of Taber to contract with Alberta Rural Development Network (ARDN), to complete a Needs Assessment for Taber and area. As well, ARDN was to prepare an Affordable Housing Strategy. As part of the Needs Assessment process, representatives of specific sector groups (major employers, housing industry specialists, health and service groups and Seniors) were invited to participate in focused discussion groups. As well, a public consultation meeting was held; in conjunction with an online survey tool to gather information from the community about Affordable Housing.

TDHF has been collaborating with several other local agencies (Safe Haven Women's Shelter Society, Taber Food Bank Society, Taber Victim Services, and St. Vincent De Paul Benevolent Society) to address needs of Taber residents; particularly trying to address single residents and those under the age of 55 years old.

TDHF conducted staff and resident surveys to gather information about staff and resident satisfaction and identify areas of potential concern or improvement opportunities.

Additional data was obtained from several sources including, *2016 & 2021 Census* from Statistics Canada, Province of Alberta – *Regional Dashboard – 2024*.

In compliance with legislation, TDHF previously completed and submitted a 2023-2025 Business Plan. Information from that Business Plan was incorporated into this Business Plan and further developed in accordance with TDHF's governance policies which state our purpose, values and accountability as mandated by the Board of Directors. This plan was drafted by TDHF staff and management, reviewed by senior management and the Board for clarity and understanding, and presented to the Board for final approval.

ENVIRONMENTAL SCAN

The Market and Market Factors

The Town of Taber, where the majority of Taber and District Housing Foundation's portfolio is located, is a major service center of a thriving, diversified economy. Its trading area extends in all directions from the Town, and includes the Municipal District of Taber, the Town of Vauxhall, and the Village of Barnwell, which are member municipalities of Taber and District Housing Foundation.

Throughout the area, there is a varied and vigorous industrial base related to agriculture, food processing, and oil and gas well servicing. This diversity has given the area a steady, vibrant, and growing economic climate, when other similar-sized trading areas in the province have been affected by unsettling cyclical highs and lows.

The area has excellent highway and rail transportation routes and connections to the major population/industrial sectors of southern Alberta. In addition, there is a wide abundance of excellent recreational sites and facilities dispersed throughout the region, attracting not only residents, but also international tourists. The result is that the region has grown steadily in all aspects of population and financial resources.

Defined as a rural small town by Statistics Canada, Taber's population is 9,853 as determined by the results of the 2024 Province of Alberta – Regional Dashboard (8,862 in 2021² Census), with an approximate trading area of 25,000 people. Results show the 2021 to 2024 population increase of 11.2%. Taber and area continue to show combined growth in citizens over the age of 65 (from 2,155 in 2021 to 2,299 in 2024) – a 6.7 % increase.

	Town of Taber			MD of Taber		
	2024 ³	2021 ²	2016 ¹	2024 ³	2021 ²	2016 ¹
Population	9,853	8,862	8,428	7,934	7,447	7,098
Total number of persons aged 65 years and over in private households	1,459	1,405	1,270	840	755	610
Age – 65 to 69	429	415	370	272	290	245
70 - 74	349	335	285	248	205	150
75 - 79	297	240	220	151	120	105
80 - 84	156	195	175	107	80	65
85 +	228	220	220	62	55	45

¹ Statistics Canada *Census Profile 2016*

² Statistics Canada *Census Profile 2021*

³ Govt of Alberta *Regional Dashboard 2024*

Seniors

There are numerous variables, which, in the future, will affect the viability or marketability of TDHF Foundation's Senior's Housing portfolio.

Regional Dashboard 2024: Taber and area residents over 65 years grew by 23% between 2016 and 2024. The number of seniors is expected to continue climbing as more and more Baby boomers turn 65.

Statistics Canada (2022) reports by 2041, seniors are projected to comprise nearly a quarter (24.5%) of the Canadian population, as compared to 14.8% today (*Statistics Canada 2022*). Those aged 85 and over are expected to nearly triple to 5.8% of the total population by 2041.

Aging in Place: Health Care Services are moving toward a Community Care model, as a means of economizing on health care dollars. Many of the residents in our senior self-contained apartments are remaining in place while they age instead of relocating to Clearview Lodge. Senior residents may also choose to stay in their homes and participate in client-directed home care programs.

Need for Higher Level of Care: Seniors relocating to Clearview Lodge often require a higher level of care because of a diminished physical and/or mental condition. A higher level of care program (formally known as SL3, now referred to Type B Continuing Care) began in 2001 at the Clearview Lodge and this successful initiative is expected to continue. TDHF is exploring the possibility of adding SL4 beds and associated care services to the Lodge and has contacted AHS for discussion of same. There seems to be a tremendous need for additional SL4 beds in South Zone and this change would allow for Clearview Lodge to have an established community of care.

Greater Affluence of Seniors: A private development of Senior Citizen's condominiums (for ownership), immediately adjacent to our Seniors projects has been constructed, on a phased basis over the past number of years. The projects pricing and amenity standards appeal to the more affluent senior and thus does not directly compete with us currently. This greater affluence of Seniors also permits them to hire outside labour for yard maintenance, and domestic duties such as cleaning and cooking.

The Good Samaritan Society opened a 105-unit facility in 2011 which offers a higher level of care than Clearview Lodge. This facility consists of:

- 3 twelve bed Dementia Care Cottages (total 36 units) (SL4d)
- 5 Community Support beds
- 64 Supportive Living Suites - Designated Assisted Living (SL4)
- 6 one bedroom
- 58 studio suites

Seniors Rental Accommodation: Competition from the private sector for rental accommodation for seniors does not appear to be a market factor, currently.

Low and Moderate-Income Families

The nature of the diversified industry in the catchment area provides opportunities for a wide variety of skilled and unskilled laborers to stay in, or relocate to, this region. Some can command relatively high wages, while many others compete at a much lower level for semi-skilled or low-skilled, full-time, or seasonal, work at such facilities as the food processing, agricultural, service, or hospitality industries. Many have experienced marital or home breakup, leaving single mothers to barely exist, sometimes on Social Assistance.

Single parent families currently occupy nearly all 30 units in our Taber Community Housing portfolio. Effective October 1, 2025, all Social Housing tenants will have their rent calculated as 30% of their income, regardless of income source. This change is being made to calculate annual rents more consistently and fairly between tenants. It is anticipated that this change could increase the overall rent collected from Community Housing tenants but it is not clear at this time as to the magnitude of the potential increase.

Community Housing

The market for our Community Housing is limited to families who will incur a financial burden while paying for accommodation at market price. Competition for TDHF Foundation community housing comes from landlords who rent mobile homes, small housing units, or basement suites and apartments. The Rent-Geared-to-Income provisions of the TDHF Foundation portfolio make Taber and District Housing Foundation accommodations more suitable and affordable for low-income families.

Currently, the Community Housing waiting list consists mainly of one parent/one child families. TDHF only has 2 units that have two bedrooms. The need exists for more two-bedroom units.

TDHF has no opportunity to provide housing for single individuals. In 2018, TDHF participated in a needs assessment process with Alberta Rural Development Network (ARDN, but now called Rural Development Network). As part of the needs assessment completed by ARDN, it was identified that over 50% of single individuals in Taber and area, paid more than 30% of their income in housing costs. This statistic formed much of the basis for the proposed affordable housing project that was submitted by ARDN, on behalf of TDHF. There is considerable need for affordable housing in the area.

In 2023 and 2024, Taber has experienced a significant reduction in vacancies and the market price for rental properties has increased more than 10% each year. The lack of affordable housing has created significant challenges for individuals to find market rentals and at prices that align with their incomes. TDHF has seen a significant increase in Rental Assistance Benefit (RAB) participants in the past 3 years (from 10 in 2022 to over 40 in 2024). As well, Social Housing clients can not move out into market housing and as a result, there has been very little turnover in units and a corresponding reduction in vacancy rates (*See Community Housing – Avg. Building Vacancy % by year – Page 16*).

VACANCIES

Seniors Self-Contained Apartments Portfolio

In the self-contained apartment portfolio, TDHF manage 101 units in buildings owned by Alberta Social Housing Corporation (AHSC). The occupancy rate is healthy and steady at approximately 95 to 98%.

Filling vacancies in Vauxhall and Grassy Lake has historically been challenging. However, since 2019, the vacancy rates have consistently declined, due to significant increases in local market rent values and TDHF engaging more with the low-German Mennonite community and showing that community housing could be an option for them (particularly their seniors).

The occupancy statistics suggest that there is significant demand for apartments in the area, but it can vary in the smaller villages and towns. Sometimes the outlying areas do have barriers as lack of transportation or proximity to medical services and so Senior residents want to instead live in Taber.

Within Taber, the vacancy rates vary year to year, but it does seem that the Facility Conditions Indices suggest that the overall condition of the units are declining over time. This could be due to some amount of deferred maintenance and tight operating budgets.

Average Building Vacancy % by Year

	# UNITS	2019	2020	2021	2022	2023	2024
Harmony Home - Taber	25	7.52%	9.04%	1.55%	5.17%	4.28%	3.83%
Pioneer Place - Taber	30	4.05%	4.62%	2.61%	1.28%	2.53%	2.60%
Homestead Manor - Taber	30	2.02%	2.75%	2.22%	1.25%	1.91%	0.70%
Prairie Rose Manor - Vauxhall	8	25.46%	20.39%	19.36%	15.46%	10.68%	4.64%
Bountiful House - Barnwell	4	3.00%	0.00%	0.00%	0.00%	2.51%	1.32%
Sunshine Manor – Grassy Lake	4	25.00%	18.15%	3.08%	0.34%	0.00%	0.34%
Overall Vacancy Rate		7.40%	7.17%	4.00%	3.66%	3.58%	2.43%

Community Housing Portfolio

Significant demand for Community Housing in Taber and area is reflected in the vacancy percentages. Currently, there are eleven (11) clients on a waitlist requiring two, three and four-bedroom units.

RAB funding for TDHF has been increasing steadily for the last several years. The program has grown from ten (10) clients to over forty (40). There are currently seven (7) applicants on a Rental Assistance Benefit (RAB) program waitlist. In 2025, TDHF changed the formula for support levels for clients in two and three-plus bedroom units. The goal is to secure additional funding to add more RAB recipients in Taber and area and address the waitlist.

The need for one bedroom and additional two-bedroom units forms the basis of the request for an Affordable Housing project. The details of the project were prepared and have been forwarded by Rural Development Network (RDN) as part of the Assisted Living and Social Services – Affordable Housing Partnership program. A copy of the proposal will be submitted as TDHF's first priority in **Appendix E: Capital Priorities**.

It should be noted that while occupancy rates have increased recently (and are expected to continue to remain high), rental revenues from Community Housing have also increased slightly. Rental revenues are anticipated to continue to increase also due to changes in regulation for rent calculation for tenants (effective October 1, 2025) that will pay 30% of their income regardless of income type).

Average Building Vacancy % by Year

	2019	2020	2021	2022	2023	2024
Phase 1 - Taber	9.00%	10.44%	1.44%	6.15%	6.45%	1.16%
Phase 2 - Taber	22.01%	0.73%	3.29%	4.66%	1.05%	5.78%
Phase 3 - Taber	12.05%	7.81%	25.89%	25.89%	1.30%	0.61%
Phase 4 - Taber	0.00%	0.00%	0.00%	0.00%	8.31%	0.00%
R & N - Barnwell	33.00%	0.00%	0.00%	0.00%	0.00%	0.00%
R & N Vauxhall	0.00%	0.00%	16.16%	0.00%	0.00%	0.00%
Overall Vacancy Rate	10.93%	9.57%	5.12%	7.07%	4.60%	1.68%

As a result, it is anticipated that overall rental revenues will continue to increase slightly for Community Housing and Senior Self-Contained Housing in the future. These modest revenue increases are reflected in **Appendix C: Financial Plan**.

Senior Assisted Living (Clearview Lodge)

	2019	2020	2021	2022	2023	2024
Overall Vacancy Rate	1.50	3.00	4.00	1.50	1.25	1.20

Vacancy continues to be low for Clearview Lodge, and the Lodge has been able to recover successfully since COVID. The Lodge Manager is spending a considerable amount of time working to fill empty rooms quickly. The concerns about room size, the age of the facility and lack of amenities (many units do not have bathtubs or showers) are expressed regularly by potential residents and their families. It is expected that these concerns will continue to be an issue that preclude individuals from choosing to live at Clearview Lodge and contribute to a greater number of vacancies.

As well, couples would prefer to occupy a single larger unit that could accommodate both spouses at the same time. This would greatly facilitate move-ins for resident couples. In 2019, TDHF Board of Directors approved a pilot renovation project where two of the smallest rooms (#509 and 510) were combined into a larger (approx. 380 square feet) couples' unit. Previously, these single rooms consistently had the highest turnover in the entire lodge. Lodge management have reported that residents are positive about the new room configuration and there has been very little turnover on the unit.

TDHF Building Committee has undertaken a design process to develop a plan to modernize and expand the Clearview Lodge. Since September 2019, TDHF has been working with Vaughan Hoy Architecture (now part of Arcadis Professional Services) of Edmonton to develop design and construction documents for a facility that would build 46 new units on a three-story building with basement. The current facility would be renovated and modernize to house 34 rooms and new recreation space, meeting areas and business offices. The current kitchen, dining room and main atrium would be retained. A copy of the proposal will be submitted as TDHF's second priority in **Appendix E: Capital Priorities**.

UPDATE: *On June 17, 2025, TDHF received a letter from Minister Jason Nixon, Minister of Assisted Living and Social Services, stating that Taber and District Housing Foundation had received approval for new funding under the Seniors Lodge Modernization Program (SLMP). The capital grant funding was conditionally approved for up to \$9,070,000 for the Clearview Lodge – Expansion and Modernization project.*

GOALS, STRATEGIC PRIORITY INITIATIVES, EXPECTED OUTCOMES AND PERFORMANCE MEASURES

Goal One: Quality Housing, Infrastructure and Care for Residents

Strategic Priority Initiatives:

- 1.1 Increase Community Housing
- 1.2 Design & Build Cherry & Main Affordable Apartments project
- 1.3 Modernize and expand Clearview Lodge

Expected Outcomes:

- 1.1 Increase in residents living in TDHF facilities
- 1.2 Financial approval to regenerate Govt. of Alberta owned facilities
- 1.3 Increase resident satisfaction in TDHF properties
- 1.4 Build Cherry & Main Affordable Apartments project (**Appendix E: Priority #1**)
- 1.5 Renovate and expand Clearview Lodge (**Appendix E: Priority #2**)

Performance Measures

- 1.1 Occupancy level to remain steady or slight growth (Senior Self-Contained and Community)
- 1.2 Satisfactory Facility Condition Index (FCI) and/or Facility Condition Rating (FCR) reports of 15% or lower
- 1.3 Apartment resident satisfaction survey score of 85% or higher in the following areas:
 - Cleanliness & Maintenance
 - Delivery of Service
 - Satisfaction with the staff
 - Condition of Suite
 - Recommend TDHF to others
- 1.4 Lodge resident satisfaction score of 90% or higher in the following areas:
 - Cleanliness & Maintenance
 - Safety & Security
 - Personal Care
 - Satisfaction with the Staff
 - Meals

1.1 Occupancy Level

Priority Initiative	Performance Measure	2022	2023	2024	2026 - 28 Target
1.1	Occupancy Percentage - Self-contained Apartments	3.66%	3.58%	2.43%	3.00%
1.1	Occupancy Percentage - Community Housing	7.07%	4.60%	1.68%	4.00%
1.1	Occupancy Percentage – Clearview Lodge	1.50%	1.25%	1.20%	1.00%

1.2 Facility Condition – TDHF Portfolio

Facility Condition Index (FCI)*

Less than 15%	Good
16 to 39%	Fair
40% and over	Poor

Facility Condition – Senior Self-contained Housing

Project Name	Address	Number of Units	Ownership	Building Type	Facility Condition / Date of Rating
Harmony Home	4710 – 50 th Ave., Taber	25	ASHC	Manor	FCR – 33.13% 2017
Homestead Manor	4900 – 48 th Street, Taber	30	ASHC	Manor	FCR – 24.55% 2017
Pioneer Place	4705 – 49 th Ave., Taber	30	ASHC	Manor	FCR – 14.53% 2017
Bountiful House	508 – 1 st Street E, Barnwell	4	ASHC	Manor	FCR – 19.71% 2013
Prairie Rose Manor	624 – 3 rd Ave., Vauxhall	8	ASHC	Manor	FCR – 10.93% 2017
Sunshine Manor	437 – 2 nd Street S, Grassy Lake	4	ASHC	Manor	FCR – 7.56% 2013

Facility Condition – Community Housing

Project Name	Address	Number of Units	Ownership	Building Type	Facility Condition / Date of Rating
Bountiful House (R&N 2)	508 – 1 st Street E, Barnwell	2	ASHC		FCR – 19.71% 2013
Barnwell (R&N 1)	102 – 4 th Ave. E., Barnwell	1	ASHC		FCR – 14.75% 2017
Prairie Rose Manor (Vaux. R&N 1)	624 – 3 rd Ave., Vauxhall	4	ASHC		FCR – 10.93% 2012
Vauxhall (R&N 2)		2	ASHC	House House	FCR – 7.86% 2012 FCR – 7.72% 2012
Taber Phase 1		20	ASHC	Fourplex	*
Taber Phase 2		6	ASHC	Duplex	FCR - 13.68 to 22.01% 2013
Taber Phase 3		4	ASHC	Duplex	FCR – 7.8% 2013
Special Needs		4	ASHC	House	18.11 2017

*FCI reports have not been completed or were not available at the time of this report.

Facility Condition – Lodge

Project Name	Address	Number of Units	Ownership	Building Type	Facility Condition / Date of Rating
Clearview Lodge	4730 – 50 th Street, Taber	77	TDHF	Lodge	18.53 2017

1.3 Senior Self-contained Apartment Resident Surveys

Priority Initiative	Performance Measure	2018	2020	2021	2026 - 28 Target
1.1	Cleanliness & Maintenance	90.6%	87.9%	90.6%	85%
1.1	Delivery of Service	74.5%	83.9%	77.6%	85%
1.1	Satisfaction with the staff	82.0%	87.5%	86.2%	85%
1.1	Condition of Suite/Buildings	86.8%	87.7%	88.1%	85%
1.1	Recommend TDHF to others	94.3%	97.1%	95.5%	85%

A survey was completed 2021 for Community Housing but the response rate was below 20%. The results were encouraging that tenants felt comfortable and satisfied with Placement Officer and Maintenance team members. Overall satisfaction reported was very good, but the low response rate (7 responses) could suggest that only those with positive experiences responded.

During and since COVID, a survey has not been completed but rather TDHF staff have been regularly attending Manor Association meetings to discuss individual building concerns. On April 23, 2024, TDHF representatives organized and attended a Community Housing Tenant Meeting to answer questions about any tenant issues.

1.4 Clearview Lodge Resident Survey Results

Priority Initiative	Performance Measure	2018	2020	2024	2026 - 28 Target
1.1	Cleanliness & Maintenance	98.3%	100%	96%	90%
1.1	Safety & Security	96.6%	98.3%	91.2%	90%
1.1	Personal Care	92.0%	95.5%	92.5%	90%
1.1	Meals	87.9%	88.1%	80.2%	90%
1.1	Satisfaction with Staff	98.2%	100%	92.0%	90%

Goal Two: Demonstrate effective leadership and operations

Strategic Priority Initiatives:

- 2.1 Ensure strong leadership within the organization
- 2.2 Build strength in the team by investing in staff (i.e., training, professional development)
- 2.3 Develop and introduce adaptive programs and services that meet client and community needs.

Expected Outcomes:

- 2.1 Better service delivery from competent, trained staff
- 2.2 Staff satisfaction
- 2.3 Fewer staff injuries
- 2.3 Improved Human Resources information management
- 2.4 Clean Auditors Report

Performance Measures

- 2.1 Certificate of Recognition (COR) Audit results 95% or better in all Elements:
The Certificate of Recognition program (COR) is an occupational health and safety accreditation program that verifies a full implemented safety and health program which meets national standards. The objectives of COR are to provide industry employers with an effective safety and health management system to reduce incidents, accidents and injuries as well as their associated human and financial costs.
- 2.2 Staff survey results of 85% or higher related to the following areas:
 - Sufficient training provided to staff
 - Open communication between Management and co-workers
 - Safety perception survey
- 2.3 WCB performance results – achieve PIR discount of 10% or higher and continue to rate favorably against average industry rate claims

2.1 Certificate of Recognition (COR) Audit Results

Priority Initiative	Element Number	2020 External Results	2023 External Results	2024 Internal Results	2026 Target
2.1	1. Management Leadership and Organizational Commitment	100	88	100	95
2.1	2. Hazard Assessment	94	98	90	95
2.1	3. Hazard Control	98	88	98	95
2.1	4. Joint Health & Safety Committees	62	89	93	95
2.1	5. Qualifications, Orientation and Training	88	100	100	95
2.1	6. Other Parties at or in the vicinity of the work site	100	70	98	95
2.1	7. Inspections	73	95	100	95
2.1	8. Emergency Response	85	100	100	95
2.1	9. Incident Investigation	70	92	100	95
2.1	10. System Administration	60	86	100	95
	Total	84	92	97	95

2.2 Staff Survey

Priority Initiative	Performance Measure	2018	2021	2023	2026 - 28 Target
2.2	Open Communication between Management and co-workers	77.78%	92.6%	81.5%	90%+
2.2	Sufficient training provided	88.89%	88.9%	88.9%	90%+
2.2	Recommending people for a position at TDHF	77.78%	85.2%	85.2%	90%+

2.3 WCB Performance Results

Priority Initiative	Performance Measure	2022 Results	2023 Results	2024 Results	2026 - 28 Target
2.3	Lodge – PIR Discount Achieved	20%	15%	12.52%	15%
2.3	Lodge – Discount Achieved from favorable industry rating	5%	5%	5%	5%

Goal Three: Foster Community Engagement & Partnerships

Strategic Priority Initiatives:

- 3.1 Continue to build partnerships with service agencies
- 3.2 Increase community awareness and connection
- 3.3 Connect to municipalities more intentionally

Expected Outcomes:

- 3.1 Engage with community partners to enhance value services to tenants and residents
- 3.2 Develop annual communication plan to map out effort to increase community awareness, including:
 - Use of TDHF website
 - Social media
 - Local media opportunities
 - Direct communication to TDHF residents and tenants
 - Collaborative efforts with municipalities and agencies that have established communication networks
- 2.3 Implement annual tenant meetings for community housing tenants
- 2.3 Participate in monthly CVL Resident Council meetings
- 2.4 Attend local government council meetings on a scheduled basis

Goal Four: Implement Sound Financial and Fundraising Practices for Organizational Self-sufficiency

Strategic Priority Initiatives:

- 4.1 Align with funder goals to be sustainable
- 4.2 Explore other revenue and fundraising sources
- 4.3 Research capital requisition for Lodge expansion and modernization

Expected Outcomes:

- 2.1. Determine key stakeholders in local area and Province to develop plans for operational sustainability.
- 2.2. Submit applications for Capital Priorities:
 - 2.2.1. Cherry & Main Affordable Apartments
 - 2.2.2. Clearview Lodge – Expansion & Modernization
- 2.3. Fundraise annual for special operational programs i.e. Meals on Wheels
- 2.4. Apply for grants (local, provincial, and national) for “quality of life” projects at TDHF portfolio properties

APPENDIX A: HMB CORPORATE PROFILE

APPENDIX B: PROPERTY PROFILE

APPENDIX C: FINANCIAL BUDGET AND FORECASTS

APPENDIX D: CAPITAL MAINTENANCE & RENEWAL

APPENDIX E: CAPITAL PRIORITIES

APPENDIX F: ASSET MANAGEMENT

APPENDIX G: CAPITAL ASSET QUESTIONNAIRE