

BUILDING BETTER TOGETHER: QUARTERLY REPORTING

2021 HOUSING YORK INC. (HYI) BUSINESS PLAN

Number of 2021 actions identified: 53

Quarter: Q3 2021

Actions in progress: 66% (35/53 actions)




Actions deferred: 6% (3/53 actions)

Actions completed: 28% (15/53 actions)

Targets achieved: 24% (13/55 targets)

Note: One action contains multiple targets
Percentages may exceed 100% due to rounding

Status Legend:

	Complete		On track		At risk		Will not be met		Not yet started		Deferred or N/A for 2021
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Strategic Priority 1: Expanded Housing Portfolio







Four-Year Actions	Key Performance Indicators	2021 Actions	2021 Target	Status	Details
Goal 1: Portfolio expansion beyond the normal rate of growth					
1.1 Support HYI portfolio expansion by recommending and prioritizing land for development/redevelopment, and identifying new partnerships through a working group of Regional team members in consultation with HYI Board members and industry experts	A. Number of preliminary development concepts, including feasibility assessments, for priority HYI sites identified through the Portfolio Management Plan	<ul style="list-style-type: none"> Complete development concept and feasibility assessment 	1 concept	On track	<ul style="list-style-type: none"> Development concepts underway for two Region-owned sites that were included as priority projects in an amended application for the Rapid Housing Initiative Round 2 Sites in the Town of Aurora, Township of King and City of Markham from Round 1 remain in Round 2 application, but have not been identified as a priority due to size and future development potential
	B. Number of development concepts explored with partners (e.g. developers, housing providers, YRRTC, Metrolinx, school boards, LHIN, school boards, faith-based organizations, local municipalities)	<ul style="list-style-type: none"> Develop program to fund and complete development concepts 	2 concepts	On track	<ul style="list-style-type: none"> Meetings have been held with developers to discuss opportunities on sites in the Towns of Aurora and Whitchurch-Stouffville Discussions are continuing with City of Markham and YRRTC regarding potential development near the Yonge North Subway Extension Continued advocacy is underway for end of mortgage savings as a potential source of funding for these projects
		<ul style="list-style-type: none"> Environmental scan to identify potential partners 	Scan completed	Complete	Met target in Q3: <ul style="list-style-type: none"> Scan completed and discussions are underway with potential partners
		<ul style="list-style-type: none"> Begin engaging with potential partners to explore opportunities 	Engagement process underway	On track	<ul style="list-style-type: none"> Meetings held with potential partners, including local municipalities and developers Will be working in partnership with municipalities that have passed resolutions to provide land to identify potential sites Followed up with municipalities that have not yet responded to Council's request for

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					the provision of land and exemption of parkland dedication fees
	C. Number of established partnerships for co-development on partner sites	<ul style="list-style-type: none"> Environmental scan to identify potential partners 	Scan completed	Complete	Met target in Q3: <ul style="list-style-type: none"> Scan completed and meetings held with potential partners including local municipalities and developers Consultant retained to explore opportunities with potential partners
		<ul style="list-style-type: none"> Begin engaging with potential partners to explore opportunities 	Engagement process underway	On track	<ul style="list-style-type: none"> Discussions continuing regarding partnership for development on sites in in the Towns of Aurora and Whitchurch-Stouffville
1.2 With Regional support, assess feasibility and initiate innovations to intensify existing HYI sites, such as: <ul style="list-style-type: none"> Modular home demonstration project Low rise development(s) Public-private partnerships Scoping of Armitage Gardens redevelopment as part of the Newmarket Health Centre Campus master plan 	A. Number of units in planning and development at a stage ready for implementation based on funding	<ul style="list-style-type: none"> Identify candidate HYI sites 	Sites identified and approved by Board	Complete	Met target in Q3: <ul style="list-style-type: none"> HYI sites have been approved by the Board for new transitional housing in the Towns of East Gwillimbury and Georgina Council approved use of Regional sites in the Town of Newmarket and the City of Markham, which were included in an updated application to CMHC's Rapid Housing Initiative Round 2 CMHC decision on funding application is anticipated in late October
		<ul style="list-style-type: none"> Affordable Housing Development Master Plan presented to Regional Council to support doubling rate of growth, with funding proposal 	Regional Council approval secured	On track	<ul style="list-style-type: none"> Continued planning, including identifying redevelopment sites and new development opportunities to support doubling the rate of growth as well as reviewing estimated construction costs and funding sources Continued advocacy is underway for end of mortgage savings as a potential source of funding for these projects Council report planned for the fall
	B. Number of modular homes project in operation	<ul style="list-style-type: none"> Delivery of modular home units on an HYI site (pending provincial funding) 	One project with 4 units	On track	<ul style="list-style-type: none"> Funding has been secured from the province for eight units on the Sutton Youth site in the Town of Georgina

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					<ul style="list-style-type: none"> Site works are underway, with substantial completion targeted for the end of 2021 Low bid contractor provided units through conventional construction with similar timelines to modular
		<ul style="list-style-type: none"> Identify candidate HYI site(s) for next modular home project 	HYI site(s) selected	Complete	Met target in Q3: <ul style="list-style-type: none"> Site was approved by the Board in Q1 Funding has been secured from the province for 18 prefabricated units on the Leeder/Porter Place site in the Town of East Gwillimbury Site works are underway, with substantial completion targeted for the end of 2021
	C. Number of low-rise infill development units under construction on an HYI site	<ul style="list-style-type: none"> Identify candidate HYI site(s) 	1 HYI site selected	Complete	Exceeded target in Q3: <ul style="list-style-type: none"> Two-Region owned sites selected Development concepts underway, and sites included in an amended application for the Rapid Housing Initiative Round 2 CMHC decision on funding application is anticipated in late October
	D. Number of public-private partnerships established for redevelopment of an HYI site	<ul style="list-style-type: none"> Identify candidate HYI site(s) 	1 HYI site selected	Complete	Exceeded target in Q2: <ul style="list-style-type: none"> Two sites have been identified consistent with the HYI Portfolio Management Plan: Armitage Gardens in the Town of Newmarket and Noblevue Pines in the Township of King Funding included in the Region's capital plan, contingent on federal/provincial contribution Report to be presented to the HYI Board in the fall
		<ul style="list-style-type: none"> Research potential public-private models 	Public-private partnership models analyzed	On track	<ul style="list-style-type: none"> Research underway and consultant retained to review potential public-private models

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Four-Year Actions	Key Performance Indicators	2021 Actions	2021 Target	Status	Details
	E. Increase in the number of units in the master plan over that at Armitage Gardens at present	<ul style="list-style-type: none"> Secure approval for Armitage Gardens redevelopment as part of Regional budget with increased number of units 	Approval for at least 116 units	Complete	Met target in Q3: <ul style="list-style-type: none"> Funding for the redevelopment of Armitage Gardens is included in the Region's approved 2020 capital plan for approximately 200 units, subject to federal and provincial funding RFP under development for community engagement following model used successfully by the Town of Newmarket for the Mulock property
	F. Amount of capital funds raised through public-private partnership (e.g. sale of land, co-development)	<ul style="list-style-type: none"> N/A for 2021 	N/A	N/A	
1.3 Partner with the Region to develop resources and offer support to non-profit organizations interested in developing affordable housing	A. Number of feasibility analyses of development potential completed for non-profit development or re-development sites	<ul style="list-style-type: none"> Establish program to fund and complete development concepts 	Program established	On track	<ul style="list-style-type: none"> Program funding considered for the draft 20-year capital budget submission in 2024 and 2026 to support capital development or redevelopment by non-profit housing providers Consultant retained to develop program parameters End of mortgage funding provides a potential opportunity to support non-profit development projects
		<ul style="list-style-type: none"> Engage with potential partners to explore opportunities 	1 partner	On track	<ul style="list-style-type: none"> Meetings held with non-profit providers that are considering redevelopment
	B. Number of non-profit units supported with development of conceptual plans and/or connection to funding streams, land lease opportunities or other resources	<ul style="list-style-type: none"> N/A for 2021 	N/A	N/A	

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

Four-Year Actions	Key Performance Indicators	2021 Actions	2021 Target	Status	Details
Goal 2: Investment from other levels of government					
2.1 Advocate to senior levels of government to fund new HYI housing developments	A. Maintain existing federal/provincial capital development funding	<ul style="list-style-type: none"> Work with the Region to target engagements (e.g. meetings or advocacy letters) with either the federal or provincial government to advocate for capital development funding 	2 engagements	Complete	Met target in Q2: <ul style="list-style-type: none"> As part of the Region's <i>10-Year Housing and Homelessness Plan 2019/2020 Progress Report</i> and 2021 Action Plan, submitted letters to federal and provincial governments advocating for ongoing capital funding to support development of at least 200 new community housing units per year, as well as continued funding under the Social Services Relief Fund Meeting held with Federation of Canadian Municipalities representatives to secure advocacy support
2.2 Work with local municipalities to advance the development of HYI housing in their communities (e.g. provision of land, parkland, planning fees)	A. Percent of development projects with municipal fee concessions	<ul style="list-style-type: none"> Negotiate municipal fee concessions for the Whitchurch-Stouffville affordable housing development and the first modular home project 	100%	Complete	Met target in Q3: <ul style="list-style-type: none"> Concessions achieved for all projects: <ul style="list-style-type: none"> Council of the Town of Whitchurch-Stouffville approved a reduction of parkland fees The Towns of Georgina and East Gwillimbury provided parkland fee exemptions
	B. Number of municipal sites identified as suitable for affordable housing development	<ul style="list-style-type: none"> Establish outreach process to identify municipal sites suitable for affordable housing development 	Process established	On track	<ul style="list-style-type: none"> Followed up with municipalities that have not yet responded to Council's request for the provision of land Responses are outstanding from the Town of Aurora and the Cities of Richmond Hill and Vaughan Will be working with those municipalities that have passed resolutions to dedicate land to identify potential sites

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Four-Year Actions	Key Performance Indicators	2021 Actions	2021 Target	Status	Details
Goal 3: HYI residents impacted by redevelopment are supported					
3.1 Develop and implement an HYI resident consultation and engagement process to inform planning for community redevelopment	A. Percent of residents in HYI communities being redeveloped who feel through an impacted resident survey that HYI was responsive to their needs	<ul style="list-style-type: none"> Develop and implement an HYI resident consultation and engagement process to inform planning for community redevelopment (subject to Rapid Housing Initiative funding approval for Nobleview, Orchard Heights and/or Brayfield Manor) 	Consultation process implemented	Complete	<ul style="list-style-type: none"> Consultation process implemented that included information sessions for HYI residents for three potential Rapid Housing Initiative projects Informed residents that funding application was not approved, and the projects are not proceeding at this time

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Strategic Priority 2: Inclusive Communities and Successful Tenancies

Four-Year Actions	Key Performance Indicators	2021 Actions	Target	Status	Details
Goal 1: Communities are inclusive					
1.1 Implement resident inclusion plan with consideration to: <ul style="list-style-type: none"> • Accessibility of buildings • Inclusive communications • Business processes and practices that respect diversity • Partnerships to provide programs and services that are important to HYI communities 	A. Number of properties where accessibility inspections are completed and enhancement plans implemented*	<ul style="list-style-type: none"> • Establish assessment criteria and complete assessments 	Assessments completed for all properties	Will not be met	<ul style="list-style-type: none"> • Held a series of workshops to inform assessment criteria through review of 2019 resident survey responses, recurring resident accommodation requests and ongoing accessibility enhancement initiatives • Secured consultant to finalize assessment criteria Why not met: <ul style="list-style-type: none"> • Due to competing workload pressures for initiatives that are time-sensitive for third party funding Mitigating Actions: <ul style="list-style-type: none"> • Recruitment underway to support projects Consequences: <ul style="list-style-type: none"> • Assessments are anticipated to be complete in early 2022 • No operational impacts are expected
	B. Percentage of residents who agree to receive general HYI communications electronically; baseline 10%	<ul style="list-style-type: none"> • Develop a comprehensive consent to electronic communications, including Landlord and Tenant Board notices 	Consent form developed	On track	<ul style="list-style-type: none"> • Working with Legal Services to adapt new Landlord and Tenant Board "Consent to Service by Email" form to address all HYI electronic consent requirements
		<ul style="list-style-type: none"> • Identify a technology solution to manage consents 	Technology solution identified	On track	<ul style="list-style-type: none"> • Yardi identified as preferred tool for tracking consents • Working with Yardi and department IT to implement configuration requirements

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

Four-Year Actions	Key Performance Indicators	2021 Actions	Target	Status	Details
	C. Residents who report that HYI treats them respectfully	<ul style="list-style-type: none"> Establish survey methodology for post-COVID (2022) resident survey 	Survey methodology established	On track	<ul style="list-style-type: none"> RFP issued to retain consultant to establish survey methodology
	D. Participation rate for programs offered defined as the number of attendees/ program capacity	<ul style="list-style-type: none"> Establish and implement data collection process for community engagement programs 	100% of programs to utilize tools Baseline established Year 4 target set	On track	<ul style="list-style-type: none"> Data collection process under development Draft tools to be piloted in all communities where programs are delivered in Q4
1.2 Research and establish tools to effectively build cultural competency amongst residents, and combat behaviours of discrimination and bias that negatively impact communities	A. Percent of team members trained in anti-racism	<ul style="list-style-type: none"> Team members trained in anti-racism 	100%	On track	<ul style="list-style-type: none"> Four training workshops held on anti-racism for the Housing Services management team One focus group held with blended team to provide feedback on ensuring a safe and inclusive work environment Continuing to work with consultant to further refine tools for the team, which will be piloted in Q4 Planning for additional knowledge-building sessions in Q4, with a final review of process in Q1 2022
	B. Percent of communities engaged in diversity and inclusion activities	<ul style="list-style-type: none"> Partner with subject-matter experts to deliver range of diversity and inclusion initiatives based on community needs** 	20% of identified communities participate in diversity and inclusion activities	Complete	Exceeded target in Q2: <ul style="list-style-type: none"> Five communities have been identified to participate in diversity and inclusion activities, four of which (80%) have participated in activities Hosted workshops for housing providers and working directly with residents regarding diversity and inclusion issues, with plans to begin supporting the remaining community

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Four-Year Actions	Key Performance Indicators	2021 Actions	Target	Status	Details
Goal 2: Residents are supported to have successful tenancies					
2.1 Refresh the Tenancy Management Plan to reflect the changing economic environment	A. Percent of tenancies at risk for rent arrears preserved***	• Offer payment plan options and supports to households in arrears	All impacted households offered options and supports	On track	• Payment plan options and supports continue to be offered to all households in arrears
		• Initiate Landlord and Tenant Board proceedings for households who do not make reasonable efforts to pay rent	97% of tenancies preserved	On track	• YTD number of households issued N4s for rent arrears as of end of August: 143 • YTD number of evictions enforced for rent arrears as of end of August: 2 • Percent of tenancies preserved: 98.6%
	B. Arrears in comparison to benchmark established through large community housing provider KPI initiative	• Work with large community housing providers to establish KPI benchmark	Benchmark established	On track	No change from previous quarter: • Working with other Service Manager-owned and operated housing companies to develop processes to share data based on existing Housing Partnership Canada definition of households in good standing (that is, households not in arrears) • Next sector meeting to enable discussion is scheduled for October
2.2 Continue to develop partnerships to support successful tenancies	A. Percent of program participants who feel through a survey the right programs/services are available in their HYI community	• Establish survey methodology for post-COVID (2022) resident survey	Survey methodology established	On track	• RFP issued to retain consultant to establish survey methodology
	B. Percent of tenancies that are preserved when the tenancy is at risk for behaviour-related issues	• Establish business process to identify and track tenancy management activities for tenancies at risk due to behaviour-related issues to set baseline, and ensure tenants are well supported	Baseline established and year 4 target set	Complete	Met target in Q3: • Business process and baseline of 90% established • Year 4 target: maintain 90%

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Four-Year Actions	Key Performance Indicators	2021 Actions	Target	Status	Details
	C. Percent of residents satisfied with referral services ****	<ul style="list-style-type: none"> Develop and implement resident satisfaction framework 	Implement according to plan	On track	<ul style="list-style-type: none"> RFP issued to retain a consultant to establish survey methodology Implementation will occur in 2022, in accordance with the work plan

* Subject to scope/funding availability

**Targeted to communities that require additional supports

***Primary reason for eviction is arrears

****From those residents who agree to a referral

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Strategic Priority 3: Financial Sustainability

Four-Year Actions	Key Performance Indicators	2021 Actions	Target	Status	Details
Goal 1: Improved life cycle value for HYI buildings					
1.1. Develop and implement an enhanced process to ensure capital and operational decisions are based on key criteria such as impacts to residents, operational needs, funding opportunities and life-cycle value	A. Percent of components that meet or exceed component life expectancy	<ul style="list-style-type: none"> Complete lifecycle analysis for replacement of building components 	Components over \$50K and new developments with targeted 90%	On track	No change from previous quarter <ul style="list-style-type: none"> Preliminary analysis complete with final analysis by the end of 2021 Work remaining will be completed in Q4
	B. Reduction in life-cycle total cost (capital and operating and maintenance) per component	<ul style="list-style-type: none"> Implement preventative maintenance module and test components 	Preventative maintenance module implemented and tested with selected components	On track	<ul style="list-style-type: none"> Preventative maintenance plans updated for generators and townhouse furnaces (the selected components), and all related assets tagged to support implementation in Yardi System testing in progress
	C. Percent increase in resident satisfied with major repairs; baseline 70%	<ul style="list-style-type: none"> Establish survey methodology for post-COVID (2022) resident survey 	Survey methodology established	On track	<ul style="list-style-type: none"> RFP issued to retain consultant to establish survey methodology
Goal 2: Increased operational efficiencies					
2.1 Evaluate and improve business processes and technology to support operational efficiency and effectiveness, evolving compliance obligations, continuous improvement and outcomes-measurement while remaining resident-centric	A. Percent of residents using PAP/online banking; baseline 90%	<ul style="list-style-type: none"> Establish business processes to encourage new residents to pay electronically 	95% of new residents pay electronically	On track	<ul style="list-style-type: none"> Business processes established
		<ul style="list-style-type: none"> Develop targeted communication plans for residents who pay by cheque or money order 	Communication plans developed	On track	<ul style="list-style-type: none"> Property Management team has begun following up individually with residents who normally pay by cheque or money order
	B. Percent of invoices processed electronically within 28 days	<ul style="list-style-type: none"> Implement business processes to manage procurement electronically 	Business processes implemented	Complete	Met target in Q2: <ul style="list-style-type: none"> Business processes implemented to enable all purchase orders to now be issued electronically to support timely invoice reconciliation

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Four-Year Actions	Key Performance Indicators	2021 Actions	Target	Status	Details
	C. Average time to complete work requested through resident maintenance requests	<ul style="list-style-type: none"> Update business processes to track completion time for resident requested maintenance repairs 	90% of resident requests performed by in-house maintenance team completed within 5 business days	On track	<ul style="list-style-type: none"> Yardi tracking process identified and report development in progress Planning training for the team on tracking completion time in Q4
	D. Percent resident satisfaction with maintenance services (rated good or very good); baseline 78%	<ul style="list-style-type: none"> Establish survey methodology for post-COVID (2022) resident survey 	Survey methodology established	On track	<ul style="list-style-type: none"> RFP issued to retain consultant to establish survey methodology
	E. Maintain resident satisfaction ratings with HYI "helpfulness"	<ul style="list-style-type: none"> Establish survey methodology for post-COVID (2022) resident survey 	Survey methodology established	On track	<ul style="list-style-type: none"> RFP issued to retain consultant to establish survey methodology
2.2 Strengthen vendor performance management to improve the quality and efficiency of maintenance and repair work	A. Improved resident satisfaction from 2019 survey for each of the following baselines: elevators 55%, outdoor green spaces 51%, janitorial 83%	<ul style="list-style-type: none"> Enhance elevator procurement to better address service quality issues 	New elevator contract awarded	On track	<ul style="list-style-type: none"> In collaboration with Legal Services and the Procurement Office, new RFP format is being utilized to consider both qualitative and financial criteria for best value for money RFP in process of being issued
		<ul style="list-style-type: none"> Establish survey methodology for post-COVID (2022) resident survey 	Survey methodology established	On track	<ul style="list-style-type: none"> RFP issued to retain consultant to establish survey methodology
2.3 Continue implementing energy efficiency projects to reduce greenhouse gas (GHG) emissions, utility consumption and operating costs while maintaining resident comfort levels in accordance with the HYI Energy and Utilities	A. Annual GHG reduction (tonnes) in communities with retrofits completed	<ul style="list-style-type: none"> Complete two years (2020/21) of EUMP projects in 2021** 	380 tonnes after full year of operation*	Deferred	<ul style="list-style-type: none"> RFP closed Deferring work to make use of anticipated federal and provincial funding Deferral to 2022 will not cause operational or health and safety risks
	B. Annual cost savings in communities with retrofits completed	<ul style="list-style-type: none"> Complete two years (2020/21) of EUMP projects in 2021** 	\$190,500 after full year of operation*	Deferred	<ul style="list-style-type: none"> RFP closed Deferring work to make use of anticipated federal and provincial funding Deferral to 2022 will not cause operational or health and safety risks

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Management Plan (EUMP)	C. Resident satisfaction with process and impact	<ul style="list-style-type: none"> Establish survey methodology for post-COVID (2022) resident survey 	Survey methodology established	On track	<ul style="list-style-type: none"> RFP issued to retain consultant to establish survey methodology
Goal 3: New developments are operationally self-sustaining					
3.1 Develop and implement a strategy to reduce the reliance on Regional subsidies while maintaining subsidized/market split	A. Subsidized/market split	<ul style="list-style-type: none"> Develop proformas for Unionville and Stouffville projects that support 70/30 split 	Proformas complete for Unionville and Stouffville	Complete	Met target in Q3: <ul style="list-style-type: none"> Proformas complete for Unionville and Stouffville that support a 70/30 split
	B. Percentage above CMHC's average market rent (AMR) charged for market rental units	<ul style="list-style-type: none"> Establish competitive rates for market units for Unionville and Stouffville based on AMR 	Market rates established based on 125% AMR	Deferred	<ul style="list-style-type: none"> Establishment of market rates has been deferred to the year in which respective developments are to begin occupancy to ensure appropriateness based on market conditions Market rate of 125% AMR is reflected in the building proformas
	C. Maximum debt as a percent of total project cost	<ul style="list-style-type: none"> Establish limit for the amount of tenant-funded debt 	Proforma reflects 15%	Complete	Met target in Q2: <ul style="list-style-type: none"> Proformas reflect 15% tenant-funded debt for new buildings
	D. Minimum operating surplus as a percent of total revenue	<ul style="list-style-type: none"> Establish minimum operating surplus 	Proforma reflects 10%	On track	<ul style="list-style-type: none"> Proformas complete Unionville proforma complete and reflects 10% minimum operating surplus Review of options is underway for Stouffville to ensure minimum operating surplus of 10% is achieved
	E. Agency/commercial space revenue	<ul style="list-style-type: none"> Design charrette for agency/commercial space for the Stouffville project 	Space design conducive for agency use/need	On track	<ul style="list-style-type: none"> Architect contract awarded and design complete As there is Regional interest in the agency/commercial space, the charrette was deferred
	F. Manageable cost/unit based on incremental costs	<ul style="list-style-type: none"> Analyze per unit costs to identify opportunities for efficiencies. 	Top opportunities identified	On track	<ul style="list-style-type: none"> Review of new build designs is underway to incorporate operating cost efficiencies Adjusted design for Stouffville development to reduce operating costs

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Four-Year Actions	Key Performance Indicators	2021 Actions	Target	Status	Details
					<ul style="list-style-type: none"> Working with Social Services on transitional housing developments to balance capital funding requirements, operating costs and service priorities

*Targets assume in-suite work can be completed within HYI communities. In-suite work may be delayed or not possible due to factors beyond HYI's control, such as restrictions surrounding COVID-19.

**2020 work was deferred due to COVID-19.

***Based on new buildings added to portfolio, starting with Unionville

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