



CORE COMPETENCY EDUCATION STRATEGY

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July 2, 2008

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Key Definitions

The following definitions apply to use of these terms in this document:

Publicly Funded Housing Agency	Any agency providing housing that receives on-going funding from any order of government. It includes: <ul style="list-style-type: none"> ○ Management Bodies established or designated under the Alberta Housing Act ○ Public Housing Agencies ○ Private For Profit or Not-for-Profit Agencies
Chief Administrative Officer (CAO)	The senior administrative officer of any publicly funded housing agency as defined above.

1 Overview of Strategy

A brief historical summary of the evolution of the Alberta Public Housing Administrators' Association's current education strategy is provided in Appendix A to this document. The current strategy was built on the belief by the Alberta Public Housing Administrators' Association (APHAA) that, because of the ever-increasing complexity of public housing administration, the Chief Administrative Officer (CAO) of any publicly funded housing agency should possess competencies in the following key administrative areas:

- Client Services
- Finance
- Human Resources
- Legislation
- Property Management & Development
- Strategic Planning, Governance & Leadership

Over the past ten (10) years APHAA's education strategy has provided excellent education, information sharing and networking opportunities. At the fall 2007 APHAA Conference the current education strategy was reviewed and discussed (see Appendix A). As part of the Association's strategic direction over the next several years, it was recommended that some enhancements be made to the education strategy.

The education strategy defined in this document builds on the successful model already in place and proposes a number of enhancements including the following key additions:

CAO Orientation

One of the education strategy enhancements identified by our membership was development of an orientation session for new Chief Administrative Officers (CAOs). Our membership indicated how valuable this would have been for many of them as they started their CAO careers. This strategy proposes the development of an orientation course and recommends that the Province of Alberta make the course mandatory for all new CAOs of Management Bodies hired on or after January 1, 2009. Completion of the course is also recommended for CAOs of other publicly funded housing agencies and would be of benefit to other senior administrative personnel of publicly funded housing agencies. The key objective of the orientation course would be to help the participant determine what additional education needs to be pursued in the core competencies and help them identify where they can obtain that education. It is estimated that the development costs will be \$5,000 + GST. Funding for the development of this course will be through a cost-sharing arrangement between the Association and the Province of Alberta. Funding for the on-going delivery of the course would be from fees charged to the participants. (See Section 3.4 for further details.)

Professional Development Program

As an enhancement to APHAA's current education strategy, it is proposed that, starting in January 1, 2009, all members of APHAA would be required to participate in a professional development program. Every two years APHAA members would be required to complete at least one Core Competency Education Module, and obtain at least three (3) other education credits. Under the direction of the Executive committee, the Association's Education Committee will be responsible for the administration of this program. Funding will come from the fees collected from the Association's education events and the general funds of the Association. (See Section 3.5 for more detail)

Core Competency Education Modules

It is proposed that five (5) Core Competency Education Modules be developed and offered to the membership as a key component of the Professional Development Program. Other interested individuals would be able to participate in the modules as well. Funding for the development of the Core Competency Education Modules will be through a cost-sharing arrangement between the Association and the Province of Alberta. It is estimated that the development costs will be \$5,000 + GST per module. Funding for the ongoing delivery of the modules would come from fees charged to participants. (See Section 3.6 for more detail)

Course Update Reserve Fund

Recognizing the ongoing need to keep course materials current and relevant it is proposed that a reserve fund be established to provide for this need. A portion of each participant fee for APHAA meeting, seminars and education events will be placed in the reserve fund. An initial amount of \$5 per participant fee is recommended. (See Section 3.6.2 for more detail)

1.1 Next Steps / Implementation Time Line

This strategy document was presented to the APHAA membership at the Annual General Meeting, May 15th, 2008. The membership approved the strategy.

Once funding is in place development of the courses will occur. Prior to the delivery of any course a “trial run” presentation will be made to members of the Association’s Executive and Education Committees. Any suggested revisions will then be made and the approved course will be scheduled for delivery.

Activity	Start Date - Completion Date
Present strategy to Membership	May 14 th , 2008 - May 14 th 2008
Approach Government for funding	May 30 th , 2008 - July 31, 2008
Develop Mandatory Professional Development Program	June 1, 2008 – October Conference 2008
Development of Orientation Course	Aug 1, 2008 – November 30, 2008
Development of First Two Core Competency Modules	Oct 1, 2008 – February 28, 2009
Delivery of First Orientation Course	January 2009 - ongoing
Development of Final Three Core Competency Modules	January 1, 2009 – June 30, 2009
Delivery of First Core Competency Modules	May 2009 – ongoing

2 Executive Committee Recommendations

The APHAA Executive Committee unanimously recommends to the Membership the following:

Recommendation #1

That the Association adopt the Core Competency Education Strategy detailed in this document, including the mandatory professional development program.

Recommendation #2

That the Association request funding by way of a cost-sharing agreement with the Province of Alberta, through Alberta Housing & Urban Affairs to cover at least one half (1/2) of the develop costs for the CAO Orientation course, the five (5) Core Competency Education Modules and this strategy document.

Recommendation #3

That Association's Education Committee assume the responsibility for administering and monitoring the professional development compliance of the members.

Recommendation #4

That the Association request the Province of Alberta to make completion of the CAO Orientation Course (CAO 101) mandatory for all new Chief Administrative Officers of Management Bodies hired on or after January 1, 2009, unless they have previously taken the course within the last five years, and, those so mandated must complete the course within twelve (12) months of their CAO position start date.

Recommendation #5

That the Association request the Province of Alberta to adopt a policy of recommending completion of the CAO Orientation course to all new CAOs of publicly funded housing agencies who are not Management Bodies.

Recommendation #6

That the Association request the Province of Alberta to provide sufficient funding through the approved operating budgets of publicly funded housing agencies to allow their CAO and other senior administration staff to fully participate in this and other relevant professional development programs.

3 The Strategy

It is proposed that the following strategy be adopted by the Alberta Public Housing Administrators' Association (APHAA). The strategy is to be implemented as funding permits. The strategy is to build on the fundamental purpose of the Association which is reflected in our "adopted motto":

Promote excellence in Public Housing Administration through

- *Education*
- *Information*
- *Networking*

3.1 Purpose / Need

As mentioned elsewhere in this document, the complexity of the business of public housing continues to evolve from pure property management to include: housing design, construction; land acquisition and purchase financing; capital acquisitions and funding; reserve calculation, financing and administration; risk management; legislative compliance; client services; income support program administration; and many more.

In all of this we can include the protection of the public as a significant motivating factor for an education strategy. Other similar industries such as health care providers and real estate practitioners have certification, licensing, and on-going professional development requirements. It is our position that the public housing industry needs to implement a more aggressive professional development strategy to protect the public interest.

Another purpose is to develop a network of knowledge, expertise and experience that a CAO can draw on through mentors and other networking opportunities when administrative difficulties arise. The educational strategy will help reduce the isolation felt by many CAOs.

3.2 Guiding Principles

3.2.1 Focus on CAOs / Senior Managers

Since its informal days as the Executive Directors Association, APHAA has been focused on the educational needs of CAOs. This principle will be maintained in this strategy. Primary focus will be to create professional development streams for CAOs.

The ongoing professional development may also be of interest to other senior managers of publicly funded agencies, particularly in larger organizations where senior responsibilities are shared by two or more administrative positions.

It is not the intention of this strategy to provide education opportunities for "front-line" employees or in the area of direct delivery of services. The focus will be on what the CAO and other senior administrators must know about the operations of their agency in the areas of the APHAA Core Competencies.

3.2.2 Recognize Diversity of Membership

Diversity of Educational Background

CAOs and other senior administrators of publicly funded housing agencies come from a large variety of educational backgrounds and experience. Some have post-secondary education and degrees, others do not; some have been in the industry for many years, others are new to the industry; some

that are new to the industry have years of experience in another industry (related or not) and for others this is their first senior position.

As a result this strategy will develop streams that meet the variety of these needs. Educational opportunities and resources will be offered to the novice, the interns of the industry, and will offer challenges to the seasoned veteran. Flexibility will be a driving factor of this strategy.

This flexibility will be accomplished through the concept of delivery by a number of different means. Those starting out will benefit from the Orientation Course (CAO 101) proposed in this strategy, where they will be able to get a sense of the public housing industry and identify the Core Competencies in which they need additional education. Our ongoing professional development modules will be geared to helping those with a bit of experience under their belts to enhance their knowledge and skills and will serve as refresher courses for the veterans as they “mentor” the less experienced. Participants can seek their professional development through many different sources, allowing pursuit of individual educational priorities.

The diversity of our membership lends itself very well to the concept of networking and mentoring. Our membership possesses a wealth of knowledge and experience, which the Association will encourage all to share through peer instructors and mentoring built into APHAA delivered courses.

Diversity of Operations

The other aspect of diversity that has been identified by the membership is that of the variety of housing programs each CAO may be delivering. Some are delivering one program, others a number of programs. It has been suggested that case studies and best practises relating to specific housing program types be part of the delivery model. We believe this concept to be valid for some aspects of some of the courses and modules proposed, but also believe that many of the principles of administration are applicable regardless of program type. For this reason delivery will not be divided by program streams in general, but, where applicable, discussion groups and materials will be provided that meet the needs of the various housing programs and issues that may be specific to one housing program type will be clearly identified.

3.3 Seminars, Information on Current Issues

The Association, through its membership and the Education Committee will continue to identify current issues facing our industry. Where a need for an information or education session on an issue is identified, the Education Committee will have the responsibility to arrange the appropriate delivery mechanism for the issue at hand.

The delivery mechanisms may include, but are not limited to the following:

- Email information bulletins
- Local / Regional / Membership Wide discussion groups
- Education Seminars at APHAA Meetings or other times
- Information included in Association newsletters and other correspondence
- Recommendations to attend outside Seminars, courses, etc.

The intent is to get relevant information to the membership in a timely manner. APHAA has been very successful at this portion of the strategy and will continue to enhance its capacity to respond to current issues.

As noted below, where Members attend Education Seminars (APHAA or outside delivered), these will be credits toward the professional development requirements proposed in this strategy.

Many of the delivery mechanisms identified above do not require any additional funding. The costs are either included in the membership fees or fees are charged to cover the cost of seminars, etc. Outside courses are voluntary and would be at the discretion of the individual and their employing agency.

3.4 Orientation Course (CAO 101)

Of all the recommendations received from the Association Membership, the creation of an orientation session for new CAOs received the strongest support. We therefore propose that APHAA enhance its current education strategy by the creation of an orientation course as follows:

- We would recommend that the Province of Alberta make the course mandatory for all new CAOs of Management Bodies hired after January 1, 2009, who have not taken the course in the last five years and that they recommend the course to all CAOs of other publicly funded housing agencies.
- Course is to be taken within twelve (12) months of employment as the CAO.
- Course would be offered in conjunction with the spring and fall meetings of APHAA, or at other times and locations as deemed necessary.
- Course content will include an introduction to the industry of public housing administration through an examination of the Core Competencies a CAO should possess, referencing how the competencies relate to operational legislation, regulation, guidelines, procedures and best practises, referencing information and education resources, including the Management Body Handbook, as appropriate.
- Course instructor(s) to be industry members
- Attending the course as resource personnel would be a Housing Advisor, and seasoned industry members representing seniors and family housing providers (if not covered off by instructor).
- The industry members would become the mentors for the new administrators.
- The benefits of membership in APHAA and ASCHA would be presented in this session.
- The primary purpose of the course would be to help the new administrator determine what educational pursuits they need to follow to enhance their skills and knowledge of the various “Core Competencies”. They would then be pointed to education opportunities offered by APHAA and to other educational resources and institutions.
- The course would be offered at least every six months. Location of the course would rotate throughout the province.
- The course would be twelve (12) hours of instruction over a two day period, timed for ease of travel. Participants would be encouraged to network and socialize during the lunch and other breaks as well as on the evening between the two days.

Funding for development of the orientation course, including instructor and student related manuals and materials, is estimated to be \$5,000 + GST. It is recommended that a cost-sharing agreement for this funding be entered into with the Province of Alberta. The Association's portion would be funded from surplus funds currently held by the Association. The Association's Education Committee would invite proposals from consultants for the development this orientation course and the Core Competency Education Modules outlined below (see section 3.6).

Funding for the delivery of the course would come from the fees charged to the participants. Funding for any future updates to the course would come from the proposed Course Update Reserve Fund recommended below (see section 3.6.2).

3.5 Professional Development Program

To ensure that the public interest is protected in our industry, CAOs should have a current understanding of emerging issues, legislation affecting the industry, risk reduction, compliance and other regulatory issues. They should be aware of best practises, and have numerous opportunities to network with other industry experts and government officials. It is therefore proposed that APHAA enhance its current education strategy by adopting a Professional Development Program Policy.

The following is presented as a proposed Professional Development Policy.

- APHAA will focus its professional development program on the delivery of mandatory and optional courses that address emerging issues, legislation affecting the industry, legal issues, risk reduction, compliance and regulatory issues.
- APHAA will develop and deliver a minimum of five (5) Core Competency Education Modules. After development, each module will be delivered at least once in each two (2) year period.
- APHAA Members will be required, starting January 1, 2009, to complete at least one (1) Core Competency Education Module every two (2) years to maintain their membership in the Association.
- APHAA Members will be required, starting January 1, 2009, to complete at least three (3) additional education courses or seminars in each two (2) year period to maintain their membership in the Association.
 - Completion of a second or more Core Competency Education Modules will be considered credit towards the additional education requirement.
 - Completion of any other seminar or course offer by APHAA during the two year period will be considered a credit toward the additional education requirement.
 - Members may submit a request to the Education Committee of the Association for approval of other courses and seminars to be considered as credit toward the additional education requirement. A list of approved courses and seminars will be made available to the Membership. The list of approved courses shall include the following:

- Any courses or seminars offered by the Alberta Senior Citizens Housing Association (ASCHA)
- Any course or seminar offered by the Canadian Housing and Renewal Association (CHRA)
- Any course or seminar offered by the National Association of Housing and Development Officials (NAHRO)
- Any course or seminar offered by the Building Owners and Managers Association (BOMA)
- Any course or seminar offered by the Institute of Real Estate Management (IREM)

The committee's ruling may be appealed to the Association's Executive Committee, whose decision shall be final.

Members must submit proof of attendance and satisfactory completion of a course to receive credit.

- Any Member who is involved in an ongoing professional development program to maintain a degree or professional designation, may apply to the Association's Education Committee for approval of such as credit towards the additional education requirement. A list of approved professional development programs will be made available to the Membership. The following shall be included in that approved list:
 - Certified Property Manager – Institute of Real Estate Management
 - Alberta Licensed Real Estate Agents or Brokers

The Committee's ruling may be appealed to the Association's Executive Committee, whose decision shall be final.

Members will be required to provide evidence that they have completed the requirements of any such professional development program to receive credit.

- The Education Committee shall track the compliance of APHAA members with the professional development program requirements. It however shall be the member's responsibility to ensure that the requirements are met and provide evidence of such compliance as necessary.
- APHAA will promote professional development of all CAOs and senior administrators within the public housing industry. Any interested individual may attend any APHAA sponsored education course or seminar, unless it is designated "Members Only" by the Association's Executive Committee.
- APHAA will cover the cost of administration of this program from the general funds of the Association.

3.6 Core Competency Education Modules

It is proposed that the current education strategy be further enhanced by the creation and implementation of Core Competency Education Modules. It is recommended that, initially, five (5) modules be developed over the next year. There may be additional modules developed in the future

as need determines and funding is made available. It may be discovered that some of the modules will need to be divided into more than one module after we have some experience with their delivery.

3.6.1 Content and Delivery

It is proposed that the following five (5) Core Competency Modules be developed. They are listed in the recommended order of development. The Association's Education Committee shall determine the final order of development based on membership input.

Development will include an instructor's manual and resource kit, as well as a student manual and resource kit. The student manual and resources kit would be made available on the Association's website for reference at any time by Members.

Modules & Content Outline

1. Property Management & Development
 - Planned maintenance
 - Dealing with contractors & suppliers
 - Health & Safety programs
 - Project development
 - Government funding
 - Capital fund sources
 - Needs assessments
 - Building design
 - Zoning and dealing with the municipality
 - Maintenance reserves
 - Provincially owned vs. agency owned

2. Strategic Planning, Governance & Leadership
 - Board/CAO relationship
 - Need for strategic planning
 - Integrating Mission/Vision with Strategic Plan, Business Plan, CAO priorities and evaluation
 - Governance systems
 - Carver
 - Working with the government, Federal, Provincial and Municipal
 - Case studies in leadership
 - Dealing with the media
 - Volunteers

3. Client Services
 - Housing framework, continuum of care, aging in place
 - Temporary vs. long term community housing
 - Managing vacancies and wait lists
 - Resident/Tenant leases
 - Eviction
 - Health care issues in all types of housing
 - Contracts to provide health or personal care services
 - Standards & accreditation
 - Services beyond housing

4. Finance and Human Resources
 - Basic financial management
 - Financial controls
 - Cheque signing, petty cash, trial balance, etc
 - Role of the auditor
 - Budgeting
 - Reporting to the Board
 - Capital Fund Development – fund raising
 - Common Human Resource policies
 - Union agreements
 - Compensation systems
 - Health & Safety
 - Recruitment, retention, rewarding
 - How to terminate

5. Legislation
 - Detailed review of:
 - Alberta Housing Act
 - Residential Tenancies Act
 - FOIP
 - Protection of Persons in Care
 - Accommodation Standards
 - Overview of other impacting legislation
 - Labor code, fire code, building code, health regulations, etc
 - Discussion of pending legislation such as Supportive Housing Act
 - Housing programs
 - Discussion of history of housing legislation, changes, how to read legislation

Each module would provide twelve (12) hours of instruction, offered over a two (2) day period. At least three of these modules will be offered each year beginning in 2009. Times and locations would be determined by the Education Committee. Course delivery would include the following principles:

- Course instructor(s) to be industry members
- Attending the course as resource personnel would be a Housing Advisor, and seasoned industry members representing seniors and family housing providers (if not covered off by instructor(s)).
- The industry members would become the mentors for the new Managers.

3.6.2 Module Funding

Funding for development of the modules, including instructor and student related manuals and materials, is estimated by the consultants to be \$5,000 + GST per module (\$25,000 + GST total). It is recommended that a cost-sharing arrangement be entered into with the Province of Alberta. The Association's portion would come from surplus funds currently held by the Association. The Association's Education Committee would invite proposals from consultants for the development of these modules and the CAO Orientation Course outlined above.

Funding for the delivery of the course would come from the fees charged to the participants.

Course Update Reserve Fund

It must be recognized that there will be a requirement for continual updates to the courses developed so that they remain relevant. It is estimated that this will require \$2,000 on an annual basis. It is suggested that a portion of all fees charged (e.g. \$5/fee) for participation in Association meetings and education events be placed in a reserve fund, the expenditure of which can be authorized by the Association's Education Committee for updates and enhancements to any of the modules or orientation course as well as to help with the development of new courses/modules.

3.7 Other Education Initiatives

The Association recognizes that there is an almost endless volume of educational opportunities and resources. The Association will encourage ongoing Member involvement in education and may use any or all of the following in this action:

- Seek feed back from the membership on courses, seminars, conferences, etc. they have taken and would recommend to other members, then share the information collected.
- Seek beneficial affiliation or other relationships with education institutions and other providers offering courses, seminars, etc. related to the core competencies or our emerging issues
- Highlight the educational achievements of members
- Structure the Association's on-line Professional Resource Centre to help members assess their educational needs then find educational opportunities and share educational materials and information.
- Invite experts in various fields to make presentations or provide written opinions, reports on specific subject matters
- Identify on-line and other sources of information and publications, etc and recommend membership subscription/participation.

3.8 Budget Implications of the Strategy

3.8.1 Implications on APHAA's Budget

The Association will need to make these considerations in its annual budget to ensure proper delivery of the enhanced education strategy:

- The Association has committed out of the current budget (2007-08) the sum of \$3,000 + GST for the development of this strategy document.
- An allocation from the surplus funds of the Association will need to be made to cover the Association's portion of any cost-sharing funding agreements.
- Fees for all association meetings and education events will need to include a surcharge to allow for the development of the proposed Course Update Reserve Fund. It is suggested

that this be initially a \$5 charge which would generate at least \$800 annually and more when the orientation course and modules are being delivered.

- Fees for education events will need to be sufficient to cover the cost of room rentals, printing course materials, and instructor fees. Estimated material reproduction costs cannot be identified until the course materials have been developed. Instructor fees could be anywhere from no cost (volunteer member instructor) to \$100 per hour for a consultant.
- Appropriate allowance will need to be made in the administration support budget expense line for administration of the professional development program tracking and delivery. For the initial year we believe the costs can be absorbed in current contracted hours, but will need to be revisited in future years as the program progresses. If increases are necessary this will require an increase in Membership fees.

3.8.2 Implications on Provincial Departmental Budgets

We believe there will be strong support by the province for the implementation of this education strategy. We hope this support will include encouraging housing agency boards to include sufficient education funding in their annual operating budgets. The following budget allocations need to be considered and approved by the Province:

- Approval of their portion of any cost-sharing arrangements for the CAO Orientation Course and the Five (5) Core Competency Education Modules.
- Approval of annual education budgets for the employing agencies as noted below (see section 3.8.3).
- Consideration of future grant applications for new course development or major course redevelopment grant applications

3.8.3 Implications on Employing Agency Budgets

We believe that publicly funded housing agencies that employ CAO's will recognize and support the professional education of their employees. We believe the professional development program of APHAA will gain increased acceptance once it is developed and is being delivered. The value of this investment in education will need to be constantly shared with agency boards.

One of the benefits of taking the CAO Orientation Course will be to help identify the education needs of each CAO. The CAO can then make an individual professional development plan to take to their board with forecasted costing over a three to five year period. The costing in the plan will need to include the registration fees and each CAO's specific travel (hotel, meals, and transportation) expenses, which will vary depending on the individual's home location and the location of the courses to be taken.

The Association must make every effort to provide information on upcoming educational opportunities as far in advance as possible. Dates, Locations and Fees of Association Meetings and Core Competency Education Modules should be announced at the Annual General Meeting in May each year for the following calendar year (e.g. 2009 events should be announced in May 2008). This would allow CAO's to include costs for this education in their annual budgets.

The Association should continue to explore ways of reducing the costs of travel for its membership such as:

- Continuing to offer opportunities for shared transportation to events.
- Offering courses in strategic locations throughout the province, minimizing the distance any participant needs to travel to complete their Professional Development Program requirements.
- Consider use of audio and/or video conferencing delivery of some education events.

4 Desired Outcome

In authorizing development of this education strategy, the Association's Executive Committee and Education Committee wish to strengthen the value membership offers, by ensuring that quality educational opportunities are provided to all members. This strategy will be key in "Promoting Excellence in Public Housing Administration".

A desired outcome is that all CAOs of publicly funded agencies in the Province of Alberta will be actively pursuing on-going education training and upgrading. The Association will do everything it can to promote this education strategy with the membership, non member CAOs, government and employing publicly funded housing agencies.

An additional desired outcome is that through this strategy, those who are not currently members of our association will recognize the benefits of membership and will join with us helping build the pool of knowledge and experience we share through our "Education, Information and Networking" strategies.

Appendix A - History / Background

A. 1998 KPMG Education Study

In March of 1998, the Province of Alberta engaged the services of KPMG Consulting to conduct an assessment of the educational needs of Boards and Chief Administrative Officers of Management Bodies. It was indicated that the need for this assessment was as a result of the increasing complexity of the social housing industry as a result of fiscal constraints, changing socio-demographics, regulatory pressures and rapid technological changes. Strong Board and CAO competencies were felt critical for responding to these challenges.

KPMG then conducted surveys with Board Members, CAOs, and provincial staff members. All participants were asked to assess the extent to which the a number of competencies were being met as well as their interest in and preferences for educational programming.

In December 1998 KPMG submitted their report, entitled “Alberta Housing Management Bodies Board / CAO Educational Needs Assessment”, to the Province through Mr. Reegan McCullough, Executive Director, Alberta Municipal Affairs. Their conclusions were that the following areas were where the greatest need for education existed:

Board & CAO Learning Needs

Boards	CAOs
<ul style="list-style-type: none"> ▪ Board role and responsibilities – governance. ▪ Strategic and business planning – understanding the business of housing; the development and execution of mission, vision and strategies. ▪ Risk Management – board liability, contracts, insurance. ▪ Legislation – interpretation and application of the Act; FOIP and related records management. ▪ Financial management – budgeting, financial statements. 	<ul style="list-style-type: none"> ▪ Strategic and business planning – developing and executing the plan, linking local plans to Departmental direction. ▪ Financial management – understanding financial planning, reserve/operating funds; investments; fund raising. ▪ Human resource management – developing and implementing staff training programs, recruiting and retaining staff. ▪ Issues management – developing problem solving skills, managing family/tenant issues. ▪ Legislation – understanding, interpreting and applying the Act. ▪ Building operations – understanding codes, working with contractors.

Their recommended principles to guide the educational programming were:

- **Quality** – relevant information is customized to the social housing industry and pertinent to “real” work situations; given by individuals/organizations with the best credentials, knowledge and experience.
- **Accessibility** – on-site and distance learning opportunities are provided across the province.
- **Availability** – all Board members and CAOs are able to participate
- **Timeliness** – training and development are provided when needed (just-in-time) and as often as needed.
- **Affordability** – costs for training and development are contained as much as possible using a range of options from joint ventures with other management bodies/organizations to sponsorships by the provincial government.
- **Partnerships** – collaboration with other learning organizations and post secondary institutions is fostered in the development and delivery of training and development programs.

They also provided the following input on timing, location, preferred instruction methods, duration, suppliers, and other resources.

Attribute	Board	CAOs
Educational Focus	<ul style="list-style-type: none"> ▪ Orientation ▪ Ongoing development 	<ul style="list-style-type: none"> ▪ Orientation ▪ Ongoing development
Timing	<ul style="list-style-type: none"> ▪ Appointment of new boards/individuals ▪ Regularly scheduled intervals 	<ul style="list-style-type: none"> ▪ Appointment of new CAOs ▪ Regularly scheduled intervals
Location	<ul style="list-style-type: none"> ▪ Orientation on-site at Board meetings ▪ Ongoing development on-site through regular Board meetings or through regional / provincial seminars 	<ul style="list-style-type: none"> ▪ Orientation on-site and with provincial housing program staff ▪ Development of basic management skills through post secondary institutions ▪ Ongoing development through regional / provincial seminars
Preferred Instruction Method	<ul style="list-style-type: none"> ▪ Presentations ▪ Discussion groups 	<ul style="list-style-type: none"> ▪ Presentations ▪ Short courses focused on case studies
Duration	<ul style="list-style-type: none"> ▪ ½ to 1 day orientation program; may be incorporated into Board meetings. ▪ ½ to 1 day educational session on legislation ▪ 1 day workshops 	<ul style="list-style-type: none"> ▪ Blocks of 2/3 concurrent days. ▪ Maximum of 10 days/year

Suppliers	<ul style="list-style-type: none"> ▪ Orientation – CAO, Province, ASCHA, other membership organizations ▪ Legislation – Province ▪ Ongoing development – private sector, Province, ASCHA, other membership organizations 	<ul style="list-style-type: none"> ▪ Province, peers, APHAA, other membership organizations. ▪ Post secondary institutions ▪ Private sector, APHAA, other membership organizations
Other Resources	<ul style="list-style-type: none"> ▪ Videos, e.g., orientation ▪ Self-help manuals ▪ Websites ▪ Bulletins 	<ul style="list-style-type: none"> ▪ Websites ▪ Internet discussion group

Their next step recommendation was the development and implementation of educational programs to effectively address the learning needs. A Board/CAO Educational Needs Steering Committee was organized on September 13, 2000.

B. Board / CAO Education Needs Steering Committee

After some discussion with the province a steering committee was organized at a meeting September 13, 2000. It was indicated that the province had \$80,000 in funding for the education initiative that would be developed. The committee consisted of three (3) members from The Alberta Senior Citizens Housing Association (ASCHA), three (3) from the Alberta Public Housing Administrators’ Association (APHAA) and three (3) from the province department (Community Development at that time).

The Committee agreed that ASCHA would be responsible for board training and APHAA for CAO training.

As our interest in this application is on CAO training we will continue the background on the development of the CAO training exclusively.

The committee recommended that the core competencies identified in the KPMG report be used as the basis for the CAO training model. Discussion of compulsory training and certification was held. By May 2001 the decision had been made that qualifications and experience were more important than certification and the resources to develop a certification program were not available. The APHAA Education Committee then began delivery of professional development seminars and courses for CAOs.

C. APHAA Involvement in CAO Training

One of the key objectives of our Association has been the education of its members. This is one of the original objectives stated in our Articles of Incorporation as a Society.

In May 2001 the APHAA Education Committee made a recommendation to the APHAA Membership that professional development seminars and courses be offered in conjunction with Association Meetings beginning in October 2001. The committee has continued to offer a number

of seminars in conjunction with the APHAA spring and fall meetings since that time. All have been targeted at one or more of the Core Competency areas adopted by APHAA based on the KPMG study.

- Client Services
- Finance
- Human Resources
- Legislation
- Property Management & Development
- Strategic Planning, Governance & Leadership

The efforts of the Education Committee on professional development lead to APHAA developing a Professional Resource Centre on its website in 2005. This resource is currently only available to members of APHAA. It provides information and links to resources for all of the Core Competencies.

At the Fall 2007 Conference the APHAA Membership reviewed these competencies and made recommendations for how the education components should be delivered.

Some of the key recommendations were:

- Need for an orientation session (CAO 101) for new Senior Managers of Public Housing
- Focus education on housing program types, including best practises and hands-on examples
- Delivery on a regional basis
- Develop mentoring approach
- Involve government

The APHAA Executive in consultation with the Association's Education Committee determined that a Core Competency Education Strategy should be developed and funding for the strategy sought from Government. Arrow Consulting Services Inc. was engaged to develop a strategy overview document for the executive to review. A document entitled "Core Competency Education Strategy Overview" was prepared and presented to the Executive Committee on February 21, 2008.

The Executive unanimously supported the strategy. Members of the Executive presented the principles of strategy to Robin Wigston, Assistant Deputy of Alberta Housing and Urban Affairs on March 4, 2008. Mr. Wigston expressed support for the principles and indicated they would welcome our funding proposal. It was suggested at that meeting that the strategy principles be shared with the Alberta Senior Citizens Housing Association, as they are developing education strategies as well. ASCHA was provided with the principles of the strategy and have indicated their support all with some considerations for us to take into account as we develop the strategy.

Following the meeting with the Assistant Deputy, the APHAA President authorized Arrow Consulting Services Inc. to begin work on a detailed strategy document that would be presented to

the APHAA Membership at the Association's Annual General Meeting, May 15th, 2008. This action was ratified by the Executive Committee at their meeting April 1, 2008.

At the AGM on May 15th, 2008, the strategy was accepted by the membership. The approved Core Competency Education Strategy is contained in this document.