



## Organizational compass (for non-profits)

### I. GENERAL INFORMATION

#### 1. To what degree do you agree with the following statements?

	Strongly agree	Moderately agree	Neither agree nor disagree	Moderately disagree	Strongly disagree
To function well, an NPO must have competent, democratic and scrupulous governance and management.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
To provide long-term quality housing, it is important to plan for maintenance and renovations.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Transparent financial management that anticipates future expenses, ensures appropriate rent collection, and clear and up-to-date accounting is necessary to maintain the best possible rent structure and to avoid sudden rent increases.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The NPO model requires active participation of tenants in decision-making and NPO operations.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The NPO model values social inclusion and engagement in the community.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

## II. GOVERNANCE

### 1. How important is governance for your NPO?\*

- ☐ Very important
- ☐ Somewhat important
- ☐ Not important
- ☐ Don't know

### 2. How well do each of the following statements describe your board of directors?\*

	Very well	Well	A little	Not at all	Don't know
The board meets regularly (e.g., monthly or quarterly).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Board meeting minutes are kept, filed and accessible.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The board has written policies and procedures.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The board reviews its policies and procedures regularly.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Board members have fixed-term mandates (e.g., 3 years).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The board ensures membership renewal (it has a succession plan).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The training or integration of new board members is ensured.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The board is in part made up of tenants from different properties owned by the NPO.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Board members represent the diversity of the community.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Board members have complementary skills (management, accounting, law, social work, etc.).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**3. To what extent do each of the following statements describe the action and functioning of your board?\***

	Very well	Well	To a certain extent	Not at all	Not applicable
The board reviews the monthly/ quarterly financial statements, meets with the auditor to review the annual financial statements, and other corporate reports.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
The board ensures the NPO meets all its legal and compliance obligations.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
The board has a strategic plan with clear objectives and assesses progress toward meeting them. It weighs its decisions carefully to ensure they are consistent with the plan.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
Board members represent the NPO in the surrounding community, in associations or consultations.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>

**4. Is your NPO a member of a federation/ alliance/ association of non-profit housing organizations? Does it participate in federation activities and use its services?\***

	Yes	No	Don't know
Our NPO is a member of a federation of non-profit housing organizations.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Board members and management attend meetings or participate in federation events.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Our NPO uses the training and support services provided by the federation.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**5. Does your NPO have any paid staff?**

- ☐ Yes  
☐ No

**6. Do you contract out work to a property management firm?**

- ☐ Yes  
☐ No

**7. To what extent do each of the following statements describe the management of your NPO, its employees and/ or volunteers?\***

	Very well	Well	A little	Not at all	Don't know
The managers, employees, contracted staff and/ or volunteers have the training and experience to properly manage our property(ies), operations and planning.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The NPO has implemented controls and processes tailored to its needs to eliminate the risk of error and/ or fraud.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The NPO has updated its computer hardware, software and security processes and ensures employees and/ or volunteers are properly trained.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Human resources policies have been put in place to recruit and manage employees and/ or volunteers, and ensure they receive all the required training.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Management and/ or volunteers prepare regular follow-up reports to the board and ensure that all reports are prepared respecting both best practice standards and established deadlines.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**8. Overall, how would you rate the day-to-day management of your NPO by staff and/ or volunteers?\***

- ☐ Excellent
- ☐ Good
- ☐ Acceptable
- ☐ Poor
- ☐ Very poor
- ☐ Don't know

**9. Overall, how would you rate the day-to-day management of your NPO by the board?\***

- ☐ Excellent
- ☐ Good
- ☐ Acceptable
- ☐ Poor
- ☐ Very poor
- ☐ Don't know
  
- ☐ Not applicable

**10. When was your business continuity plan last updated?\***

- ☐ Less than 5 years ago
- ☐ More than 5 years ago
- ☐ We never established a business continuity plan.
- ☐ Don't know

### III. PROPERTY ASSESSMENT

#### General information

**1. Some NPOs have several buildings. Often, these assets have been acquired through different funding programs or phases of programs over time. The management of these assets is subject to different agreements and contracts with funders. Has your NPO's development been carried out in different projects or in different phases?**

- ☐ Yes  
☐ No, we only have one property.

**If you have multiple properties in various locations, please select one that, to the extent possible, is representative of your other properties in terms of size, age and condition, and profile of tenants to answer the questions in this section.**

**2. What is the property address?**

Street address:

---

Municipality:

---

Province/ territory:

---

Postal code:

---

**3. Please indicate the number of units on this property:**

---

**4. Breakdown (in percentage) of the rents listed below in this property:\***

\*Where the rent is calculated based on a percentage of gross household income (e.g., Income \$1,000 per month x 30% = RGI of \$300).

Rent-geared-to-income (RGI)\* (%):

---

Rents below market (%):

---

Market rents (%):

---

**5. Does your NPO have an operating agreement\* or subsidy agreement\*\* for this property with CMHC, the province, territory or municipality?**

\*The federal government created operating agreements in the 1970s to reduce the operating costs of non-profit housing projects. These agreements are concluded for periods varying between 25 and 50 years. They help provide operating funds while housing providers pay their mortgage debt. Some subsidies also assist with operating deficits.

\*\*Subsidy agreements help housing providers bridge the gap between revenue and the total cost of their mortgage(s) and operations.

- ☐ Yes
- ☐ No
- ☐ Don't know

**6. How much time is left before the end of this agreement?**

Answer this question only if you selected Yes in question 5.

- ☐ Less than 2 years
- ☐ Between 2 and 5 years
- ☐ Between 5 and 10 years
- ☐ More than 10 years

**7. Does your NPO have an agreement for rent subsidies\* with a government entity to reduce rents for certain units on this property?**

\*Rental subsidies help tenants bridge the gap between the unit's rent amount and the amount the tenant is able to pay.

- ☐ Yes
- ☐ No
- ☐ Don't know

**8. How much time is left before the end of this agreement?**

Answer this question only if you selected Yes in question 7.

- ☐ Less than 2 years
- ☐ Between 2 and 5 years
- ☐ Between 5 and 10 years
- ☐ More than 10 years

**9. Does your NPO have a service-funding agreement with the province or municipality for this property's tenants who need support services\*?**

\*This includes support services for individuals who live with physical and/ or developmental challenges and/ or people living with mental illness or addictions

- ☐ Yes
- ☐ No
- ☐ Don't know

**10. How much time is left before the end of this agreement?**

Answer this question only if you selected Yes in question 9.

- ☐ Less than 2 years
- ☐ Between 2 and 5 years
- ☐ Between 5 and 10 years
- ☐ More than 10 years

**11. How is the overall condition of the building(s) on this property?\***

- ☐ Excellent
- ☐ Good
- ☐ Acceptable
- ☐ Poor
- ☐ Very poor
- ☐ Don't know

**Property Management**

**12. How important is property management for your NPO?\***

- ☐ Very important
- ☐ Somewhat important
- ☐ Not important
- ☐ Don't know

**13. Overall, the property management of this property is:\***

- ☐ Excellent
- ☐ Good
- ☐ Acceptable
- ☐ Poor
- ☐ Very poor
- ☐ Don't know

**14. When was this property's last full building condition assessment (BCA)?\***

- ☐ Less than 1 year ago
- ☐ Between 1 and 2 years
- ☐ Between 2 and 3 years
- ☐ Between 3 and 5 years
- ☐ More than 5 years
- ☐ Don't know



**15. Have you completed the work recommended in the most recent assessment?\***

- ☐ Most of the recommended work has been completed or is planned and, barring the unforeseen, should be completed according to the plan.
- ☐ Only the most urgent work has been done.
- ☐ The work is planned but not yet completed.
- ☐ The work is not planned.
- ☐ We have lost track of what the assessment recommended.
- ☐ Not applicable

**16. What is your approach to preventative maintenance and proactive repairs on this property?\***

- ☐ The work is completed according to the maintenance schedule and current capital budget.
- ☐ While there is no set schedule for the maintenance plan, maintenance work is done based on urgency and available resources.
- ☐ Most repairs are deferred for budget reasons and the scope of the work.

**17. What is your approach to tenant feedback?\***

- ☐ Tenant feedback is requested upon completion of regular maintenance and repairs and is reviewed regularly and informs future decisions.
- ☐ Tenant feedback is requested upon every major project completion, but there is no review process in place.
- ☐ Tenant feedback is not collected.

**18. What is your approach to tenant requests?\***

- ☐ Tenant requests are generally processed as soon as possible respecting available resources.
- ☐ Whether or not they are included in the maintenance plan, tenant requests take time to process.
- ☐ Only the most urgent tenant requests are addressed.

## **Financial management**

**19. How important is financial management for your NPO?\***

- ☐ Very important
- ☐ Somewhat important
- ☐ Not important
- ☐ Don't know

**20. Overall, the financial health of this property is:\***

- ☐ Excellent
- ☐ Good
- ☐ Acceptable
- ☐ Poor
- ☐ Very poor
- ☐ Don't know

**21. In the past five years, have you made annual contributions to a Capital Replacement Reserve Fund for this property?\***

- ☐ Yes, we have made the planned contributions each year.
- ☐ We have contributed to the reserve fund in varying amounts each year.
- ☐ No, we did not contribute to a reserve fund.

**22. How well do the following statements describe this property?**

	Very well	Well	To some extent	Not well at all	Don't know
The property is financially viable (e.g., revenues cover all expenses, including routine repairs and contributions to the capital reserve).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Vacancy losses are minimal and/or have declined over the past five years.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Rent arrears are close to zero or have been declining over the past five years.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The capital reserve is enough to complete the planned renovations.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**23. Do you have an Eviction Prevention Policy? (Including, for example, repayment schedules, access to a rent bank, landlord mediation, help to apply for income support, etc.)\***

- ☐ Yes, we have a policy that is working (either in-house or from an external resource).
- ☐ Our current policy is in need of improvement to prevent evictions.
- ☐ We are developing a new policy.
- ☐ We have not yet considered establishing processes to avoid it.

**24. To what extent is the current rent structure financially sustainable in the immediate and longer term?\***

\*Rent calculated based on a percentage of gross household income (e.g., Income \$1,000 per month x 30% = RGI of \$300).

\*\*The federal government created operating agreements in the 1970s to reduce the operating costs of non-profit housing projects. These agreements are concluded for periods varying between 25 and 50 years. They help provide operating funds while housing providers pay their mortgage debt. Some subsidies also assist with operating deficits.

	To a large extent	To some extent	Not at all	Don't know	Not applicable
The current mix of rent-geared-to-income (RGI)* and non-subsidized rent is sustainable to the extent that we have subsidy agreements in place.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
When units become available, we set rents for new tenants to ensure long-term financial sustainability even if subsidies end.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
We plan to assess the rent structure at the end of the operating agreements**.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
Our rent structure allows us to capitalize for further development and/or subsidize lower-income tenants.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>

**25. Has your NPO developed a plan to ensure that this property remains financially viable once the operating agreement has expired?\***

- ☐ We have a plan to address the end of the operating agreement.
- ☐ A detailed plan is being developed but not yet approved.
- ☐ Initial assessments identified options.
- ☐ This work has been postponed
- ☐ Don't know

**Tenant involvement and community relations**

**26. How important is it for you that tenants be involved in the NPO?\***

- ☐ Very important
- ☐ Somewhat important
- ☐ Not important
- ☐ Don't know

**27. Overall, how would you rate the involvement of tenants in this property?\***

- ☐ Excellent
- ☐ Good
- ☐ Acceptable
- ☐ Poor
- ☐ Very poor
- ☐ Don't know

**28. What is the level of involvement of this property's tenants in the following NPO activities?\***

	High	Medium	Low	None	Don't know
Participation in the board and/ or committees	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Organization of regular events/ activities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Preparation of newsletters, print, digital or internet publications	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Regular use of common space for events and activities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Participation in events and social activities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**29. How important is it for your NPO that tenants, board members and staff be involved in the surrounding community?\***

- ☐ Very important
- ☐ Somewhat important
- ☐ Not important
- ☐ Don't know

**30. Overall, how would you rate the involvement of tenants, board members and staff in the surrounding community?\***

- ☐ Excellent
- ☐ Good
- ☐ Acceptable
- ☐ Poor
- ☐ Very poor
- ☐ Don't know

**31. What is the level of tenant, board member and staff involvement in the surrounding community for this property?\***

	High	Medium	Low	None	Don't know
Participation in community events	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Use of common space for activities with community groups	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Shared common services with other community groups	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Membership in other community groups	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Participation in community initiatives to improve the surrounding community	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**32. How would you describe diversity among the tenants who live in this property?\***

If it is your organization's mission to serve a particular group or demographic in one of these categories, select "Not applicable." For example, if your NPO only houses seniors, then select "Not applicable" for "At the age level," and provide an answer for each of the other categories.

	Very diverse	Somewhat diverse	Not diverse	Not applicable
Economically	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
Linguistically	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
Culturally	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
Racially	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
At the age level	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
At the household type level	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>

**33. Which of the following best describes accessibility in this property?\***

- ☐ This property is fully accessible to people with physical disabilities.
- ☐ This property requires modifications to be fully accessible.
- ☐ This property is not accessible.

**34. Has your NPO ever assessed the feasibility of improving or expanding the accessibility of this property?\***

- ☐ Yes, and it is possible if funds are available.
- ☐ Yes, we have assessed it and it is not possible.
- ☐ No, we haven't considered it yet.

## IV. OVERALL ASSESSMENT

**1. Considering all your properties, how satisfied are you with each of the following aspects of your NPO?\***

	Very satisfied	Somewhat satisfied	Neither satisfied nor dissatisfied	Somewhat dissatisfied	Dissatisfied
Governance (board and employee)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Property management	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Financial management	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tenant involvement	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Community relations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**2. Overall, how accurately do these statements describe your NPO?\***

	Absolutely true	Somewhat true	Neither true nor false	Somewhat false	Absolutely false
Our NPO is able to maintain its operations at the same level for a long time to come without additional external support or significant rent increases (i.e., we have sufficient reserves for annual maintenance and renovations)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Our NPO has the flexibility to adapt and meet more or less predictable challenges (e.g., end of subsidies, disaster, resignation by a manager, sudden increase in energy prices)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Our NPO is strong enough to consider growing, improving its services or supporting the community (e.g., purchasing or building a new phase, accepting tenants facing serious health issues, installing public equipment in the yard)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**3. To what extent does your NPO have programs or policies in place for the following?\***

	To a large extent	To some extent	Not yet, but we plan to	Not at all	Don't know
Minimize operating costs for heating, A/C, lighting, and water.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Minimize the impacts of climate change on our tenants (e.g., heat waves, harsher winters, etc.).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Create more socially accessible and inclusive housing.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**4. How easy is it for your NPO to obtain the following services?**

	Very easy	Somewhat easy	Neither easy nor difficult	Somewhat difficult	Very difficult
Financial services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Aid for development proposals	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Aid for renovation proposals	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Architectural and technical expertise	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Services for tenants needing support services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**5. How could the Centre help you?**

---



---



---

**6. Do you have any other comments about your NPO and its housing?**

---



---



---

## 7. Do you have any feedback or other comments about this tool?

Please include as many details as possible. Your feedback will be carefully reviewed to continuously improve this tool!

---

---

---