

THE AGENCY FOR CO-OPERATIVE HOUSING

POLICY MANUAL

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Chief Executive Officer

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SUBJECT:

Selection, Contracting and Performance
Standards for Out-Partners

1. Purpose

The Agency uses independent contractors to provide continuing services that it cannot reasonably engage employees to perform, whether due to the location in which the tasks need to be done, the expertise required, or the limited volume of work. Such services include building inspections, appraisal services, and work of the same kind as the relationship managers on the Agency's staff perform. Persons engaged in this capacity are known as Out-Partners. This policy sets out guidelines for selecting, contracting with and managing the performance of Out-Partners.

2. Selection of Out-Partners

2.1 Selection Process

The requirements of the Procurement Policy are followed in selecting Out-Partners.

2.2 Qualifications

- .1 Out-Partners engaged to provide property appraisal services, other than market-rent studies, are normally members in good standing of the Appraisal Institute of Canada, and hold the designation of Accredited Appraiser, but in every case must have the professional certification required to work professionally as a property appraiser in their region.

- .2 Out-Partners engaged to conduct market-rent studies may be professional appraisers or other persons having relevant expertise and demonstrated experience in estimating market rents for residential properties.
- .3 Out-Partners providing property inspection services must have completed a post secondary degree or diploma in architecture, engineering or building sciences and must have at least three years' experience in conducting physical inspections of multiple-unit residential properties.
- .4 Out-Partners engaged to provide relationship-management services must meet the qualifications specified in the employee position description for relationship managers.
- .5 Out-Partners must be able to communicate fluently in the official language of the housing co-operative for which they are providing services.

2.3 Conflicts of Interest or Loyalty

Some of the Agency's Out-Partners are likely to have extensive experience in the management of co-operative housing and may have been, or may still be, associated with organizations in the co-operative housing movement. In order to avoid an actual or perceived conflict of interest or loyalty, an Out-Partner must not be a member, director, officer or employee of

- a housing co-operative that the Agency has engaged the Out-Partner to help;
- an organization with which the co-operative has a service contract; or
- an organization representing or supporting the co-operative in a dispute with the Agency or one of its government clients.

3. Contracting Standards

3.1 Fees

- .1 Acceptable fee ranges, reflecting fair market value, are set from time to time for each class of Out-Partner with the approval of the Director, Program Management Services.
- .2 Alternatively, where a competitive process is conducted to select Out-Partners, fees may be set through that process.

3.2 Duration of Agreements

Standing offers or other agreements with Out-Partners are normally entered into for a maximum of two years at a time.

3.3 Independent Contractors

Out-Partners are engaged as independent contractors and may not provide services on a full-time basis to the Agency. The Agency issues tax-information slips each year reporting fees paid to all Out-Partners.

3.4 Ethical Conduct

Out-Partners must conduct themselves at all times so as not to cause embarrassment to the Agency or bring its good name or that of its government clients into disrepute. Out-Partners must agree to be bound by the Agency's Ethical Conduct Policy.

3.5 Compliance with Other Agency Policies

Out-Partners must agree to respect and comply at all times with the Agency's policies governing client service, bilingual service, privacy, and confidentiality and access to information.

3.6 Other Conditions of Engagement

- .1 Out-Partners must be properly equipped to provide the contracted services to the Agency. More particularly, they must
 - have a facsimile machine on a separate telephone line or equivalent fax-to-e-mail service;
 - have an answering machine or voicemail service;
 - have high-speed Internet access, if available in the vicinity, or, where not available, dial-up access to the Internet;
 - deliver all electronic materials prepared for the Agency in the appropriate Microsoft Office program or other software specified by the Agency.
- .2 The Agency does not reimburse Out-Partners for any home-office operating expenses.
- .3 Out-Partners must take reasonable precautions to protect the Agency's files or other Agency property in their possession during the term of their agreement and return both to the Agency upon completion of their services.

4. Performance

- 4.1** Each Out-Partner's performance is evaluated at least once during the term of their agreement with the Agency by the regional team leader or other Agency employee to whom they report.

- 4.2** Further feedback on the performance of Out-Partners is obtained through the Agency's regular client-satisfaction surveys and focus groups with housing co-operatives.