

NEWELL HOUSING FOUNDATION

BUSINESS PLAN

2026-2028



Prepared: June 2026

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EXECUTIVE SUMMARY

The Newell Housing Foundation was renamed in 2021 following the amalgamation of the Newell Housing Association and the Newell Foundation.

The Newell Housing Foundation provides a quality, affordable, and safe home in a supportive environment.

The Newell Housing Foundation's goals and strategic priorities will ensure resident's needs are being met. The Foundation works hard to ensure residents feel welcomed and have a sense of belonging living in our facilities.

The Foundation's values are:

Respect- The people who live and work here are respected.

Dignity- The people who live and work here are treated with dignity.

Safety- The people who live and work here know they are safe at all times.

Honesty, Trust, Integrity- The people who live and work here are valued for their honesty, guided by integrity and feel a strong sense of trust that their needs will be met.

Caring- The people who live and work here care about each other and care about the communities that we live in.

Inclusivity- The people who live and work here are part of a welcoming and inclusive community where individuality is accepted.

Compassion- The people who live and work here respect the feelings of others and treat each other with compassion.

The Vision of Newell Housing Foundation is ***'Providing Homes; Building Hope'***

Looking Ahead

Building on our early successes—steady occupancy rates, positive resident feedback, and key service partnerships—Newell Housing Foundation is poised to expand its footprint and deepen its impact. Over the next three years, we aim to:



- Grow and maintain the inventory of Seniors and Community Housing for families in need
- Increase public and stakeholder awareness about the Newell Housing Foundation, its needs, its opportunities and its services.
- Complete the Bassano Connection Flats Independent Seniors Village
- Advocate for and secure funding to construct additional housing units in Duchess to help fill a growing need.
- Continue to invest in staff and board to ensure skills and knowledge are being continuously improved
- Develop a Legacy Fund Plan

ACCOUNTABILITY STATEMENT

The Newell Housing Foundation Business Plan was prepared under the Board's direction in accordance with legislation and ministerial guidelines, and in consideration of all policy decisions and material, economic, or fiscal implications of which the Board is aware.

Approved by the Board: June 2, 2026

PORTFOLIO PROFILE

The Newell Housing Foundation has a total of 356 'doors' or units of housing.

These units consist of:

- 180 units of lodge housing (supportive housing)
- 133 units of seniors self-contained (apartment) housing
- 41 units of community housing (family housing)
- 2 'Life Lease' units (one sold- one as a senior's rental)

Lodge Housing

The Seniors Lodge program provides rooms, meals, housekeeping services and recreational opportunities for independent seniors. You must be 65 years of age or older or have board approval if you are underage to move in.

We operate two lodges, the Newbrook Lodge in Brooks and the Playfair Lodge in Bassano.

Newbrook Lodge

The Newbrook Lodge is located at 500 3rd Street E and has 148 units consisting of studios, one bedroom, one-bedroom couples' suites, two-bedroom couple suites and two-bedroom two-bathroom couple suites. Rents are set at either subsidized or non-subsidized rates based on income. There are 4 guest suites in the Newbrook Lodge available for families to rent, respite or short-term stays. Add on services such as power, parking, personal laundry, cable and Wi-Fi are also available. The Newbrook Lodge is owned by the Newell Housing Foundation.

Playfair Lodge

The Playfair Lodge is located at 315 7th Street in Bassano and has 32 units consisting of studios or double units. Rents are set at either subsidized or non-subsidized rates based on income. Add on services such as power, parking, cable and Wi-Fi are also available. The Playfair Lodge is owned by the Government of Alberta.

Seniors Self-Contained Housing

The Seniors Self-contained Housing program provides apartment-style housing to seniors who are able to live independently. Applicants must be 65 years of age or older. In addition, applicants must be functionally independent. This type of housing is 'Social Housing.'



Pioneer Villas

The Pioneer Villas are 4 apartment buildings (Courts 1-4) located in Brooks at 426 3rd Ave W, 421 4th Ave W, 330 4th Ave W, 320 4th Ave W (all on one block). There are a total of 108 one-bedroom units and one two-bedroom unit. The Villas office is also located in the Pioneer Villa Court 4. Rent is set based on 30% of a tenant's gross monthly income to a maximum of \$937/month. Rent includes gas and water, and tenants are responsible for electricity. The Pioneer Villas are owned by the Government of Alberta.

Heritage Villa- Tilley

The Heritage Villa is a 6-unit building located at 366 Hankel Court in Tilley. All 6 units are one-bedroom. Rent is set based on 30% of a tenant's gross monthly income to a maximum of \$780/month. Rent includes gas and water, and tenants are responsible for electricity. The Heritage Villa is owned by the Government of Alberta.

Wildrose Villa

The Wildrose Villa is a 6-unit building located at 532 Dahlia Street in Rosemary. All 6 units are one-bedroom. Rent is set based on 30% of a tenant's gross monthly income to a maximum of \$780/month. Rent includes gas and water, and tenants are responsible for electricity. The Wildrose Villa is owned by the Government of Alberta.

Heritage Villa- Duchess

The Heritage Villa is a 4-unit building located at 219 Centre Street in Duchess. All 4 units are one-bedroom. Rent is set based on 30% of a tenant's gross monthly income to a maximum of \$780/month. Rent includes gas and water, and tenants are responsible for electricity. The Heritage Villa is owned by the Government of Alberta.

Dr. Scott Apartments

The Dr. Scott Apartments are 8-units located at 714 3rd Avenue in Bassano on the same property as the Playfair Lodge. All 8 units are one-bedroom. Rent is set based on 30% of a tenant's gross monthly income to a maximum of \$650/month. Rent includes gas and water, and tenants are responsible for electricity. The Dr. Scott Apartments are owned by the Government of Alberta.

Community Housing

The Community Housing program subsidizes rental housing for families with low income who cannot afford other housing options due to individual circumstances. Rent is set based on 30% of a tenant's gross monthly income. Rent includes gas and water, and

tenants are responsible for electricity. Tenants must be below government set income levels to qualify for this program. This type of housing is 'Social Housing.'

There are 41 units of community housing ranging from 2-4 bedrooms. These properties are located in Brooks on Lake Newell Crescent, Lake Newell Mews, Cassils Road W, 2nd Ave W, 3rd Ave E and Beamish Park Drive. All of the community housing units are owned by the Government of Alberta.

Life Lease

There are 2 Life Lease units located at 806 5th Ave in Bassano. These units are part of a duplex. Currently one side of the duplex has been sold and is operating as a life lease. The other side is being used as a seniors (65+) rental and once the other side is sold back it will be used as a rental as well for seniors. This building is owned by the Newell Housing Foundation.

Connection Flats Seniors Housing Village

The Newell Housing Foundation is in the process of constructing a 10-unit seniors self-contained 'village' located in the Town of Bassano. This project is being funded in part through a 3.4 million dollar commitment from the Ministry of Assisted Living and Social Services through the Alberta Affordable Housing Partnership Program using previously awarded ASLI funds the Foundation received in 2015. This innovative project will bring high-tech seniors homes for the residents of Bassano and surrounding areas.

Services

The Newell Housing Foundation administers the Rental Assistance Benefit to a large area including;

- The County of Newell and City of Brooks
- County of Paintearth
- Municipal District of Acadia
- Special Area 2
- Special Area 3
- Special Area 4

There are approximately 200 households who receive this subsidy each month.

In the Newbrook Lodge in Brooks and Playfair Lodge in Bassano the meals for the Meals on Wheels Program are prepared.

INSTITUTIONAL CONTEXT

The majority of the Newell Housing Foundation properties are owned by the Government of Alberta with the exception of the Newbrook Lodge and Life Lease duplex.

In the City of Brooks and County of Newell, the Foundation offers the only seniors' subsidized apartments and rental subsidy programs. The Newell Housing Foundation is considered to be the local expert on low-income and seniors housing needs in the County of Newell and City of Brooks.

The following municipalities are members of the Newell Housing Foundation:

County of Newell
City of Brooks
Town of Bassano
Village of Rosemary
Village of Duchess

The Board consists of elected representatives from the municipalities as well as 2 members at large.

The Foundation operates a total of 356 units. These consist of 180 units of supportive seniors living, 133 units of seniors self-contained housing, 2 Life Lease Homes, and 41 low-income family houses. Meals are provided to Lodge residents as well as housekeeping and laundry services. Lodge residents are also provided with the opportunity to participate in organized recreation activities and have 24-hour monitoring for safety and security.

Home Care is on site to assist with scheduled personal needs and bathing of residents. Home Care also provides assistance with medication and other medical needs. A Home Care Office is provided in the Playfair Lodge.

The Newell Housing Foundation is a member of ASCHA (Alberta Seniors and Community Housing Association) and the Chief Administrative Officer is accredited through the REIC (Real Estate Institute of Canada). The Foundation works closely with Alberta Seniors and Housing. The Foundation is also a member of LACAA (Lodge Activity Coordinators Association of Alberta.)

The Newell Housing Foundation also partners with Grasslands Regional Family and Community Support Services and the Bassano Family and Community Support



Services to provide the meals for the Meals on Wheels Program to Brooks, The County of Newell and Bassano.

Residents of both the Newbrook Lodge and Playfair Lodge have formed Resident and Family Councils. These councils meet every other month.

In 2015, the Newell Housing Foundation received approval of 3.4 million through the ASLI Grant Program, as well as 9.6 million split equally between the Federal and Provincial Government through the Investment in Affordable Housing Agreement (2014-2019) for the Bassano Continuing Care Center. An architect was hired for the planning, design and program development and community input was received. Unfortunately, the 9.6-million-dollar grant was rescinded, and the Foundation has been unable to move forward with this decade old project. In February 2022 the Board of Directors decided the hospital in Bassano needs to move forward with the Health Ministry before the project can begin to look forward. The Board does not feel it is the Foundation's place to push for the hospital and will await a decision from the Ministry.

In 2025 the Board enlisted the services of a facilitator to complete a 2026-2030 Strategic Plan to replace the 2021-2025 Strategic Plan. A new Vision Statement and Values were established at this time. As part of the previous plan the Strengths and Weaknesses and Opportunities and Threats for the Foundation were identified:

Strengths

- Board, management, and staff skills
- Board leadership
- Positive and committed attitude
- Financially solid
- Lobbying capacity
- Properties located in numerous communities
- Provision of a wide range of housing options
- Well-maintained properties
- Well managed merger transition

Weaknesses:

- Inadequate amount of community housing
- Vacancies in Lodges
- Older buildings
- Public awareness and communication
- Funding for growth

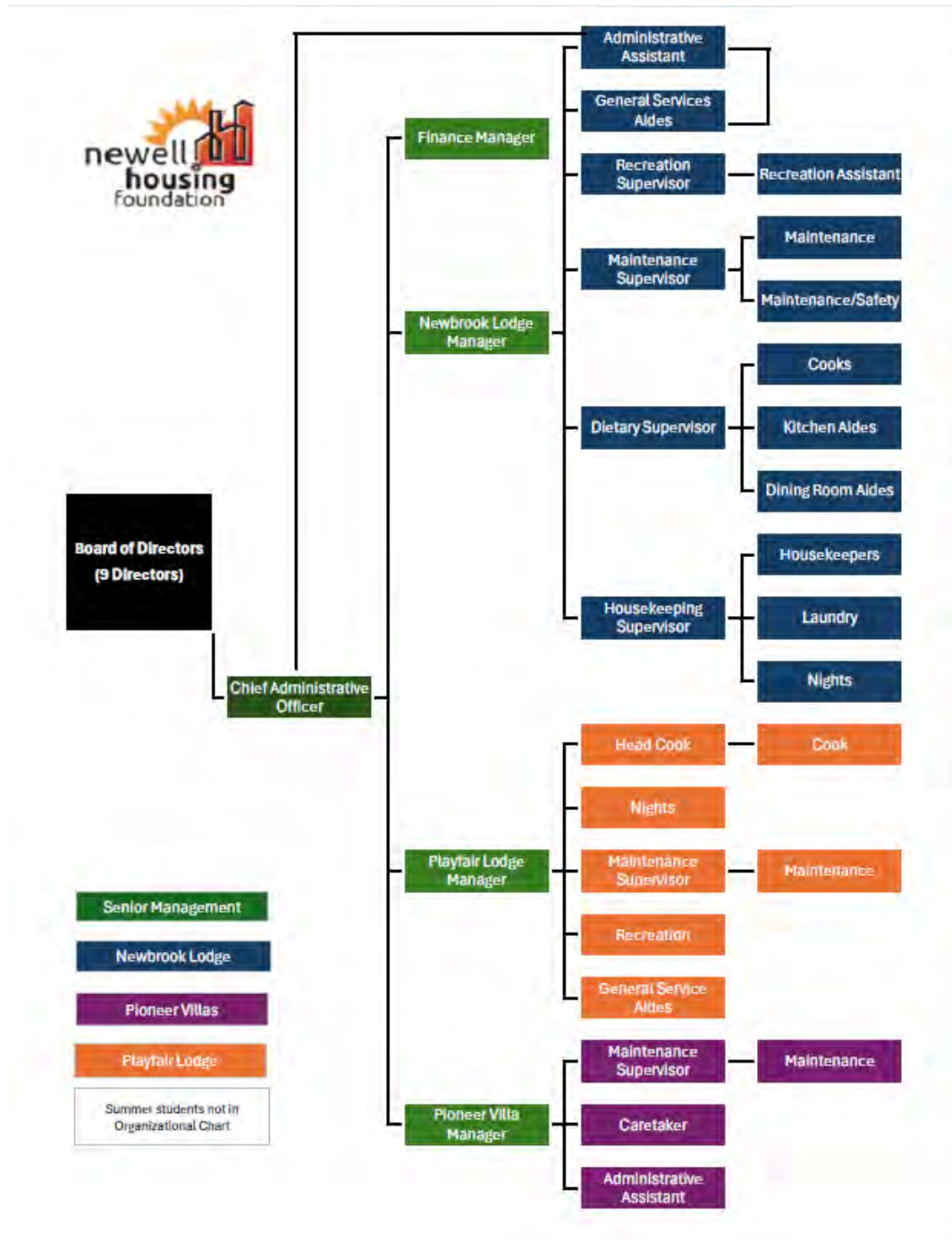
Opportunities:

- Lobbying/Advocacy
- Leverage assets to further growth
- Bassano Continuing Care Centre
- Integration of increasing community needs
- Unique community and population demographics
- New board member awareness
- Community building
- Community partnerships for growth and fundraising
- Working with Alberta Health Services

Threats:

- Pandemic issues and/or a different pandemic
- Reliance on funding from other orders of government
- Changing regulations
- Staff attrition

Newell Housing Foundation Organizational Chart



PLAN DEVELOPMENT

The Newell Housing Foundation in the making of this Business Plan used previous Business Plans and Strategic Plans. As well as, knowledge of the community and housing trends, the Management Body Handbook, Newell Housing Foundation Policy Manual, waitlist, and program information as well as feedback received from the Portfolio and Technical Advisors.

Newell Housing Foundation works closely with other housing providers, is involved in committees throughout the county pertaining to housing and is aware of the struggles and successes in the region.

This Business Plan was reviewed by a Board of Directors whose experience and knowledge help direct the plan, through conversation with management. This Business Plan was reviewed and approved by the Board of Directors June 2, 2026.



ENVIRONMENTAL SCAN

The Newell Housing Foundation operates within the County of Newell. The County of Newell is located in the heart of the Palliser Triangle in south-eastern Alberta. With 1.5 million acres of land and 7,846 people it is a thriving county. The County of Newell is mainly a rural community. However, there are 9 hamlets within the County, Bow City, Cassils, Gem, Lake Newell Resort, Patricia, Rainer, Rolling Hills, Scandia and Tilley as well as the municipalities of The City of Brooks, The Town of Bassano, the Village of Duchess and the Village of Rosemary.

The majority of the Newell Housing Foundation properties and subsidy clients are located in the City of Brooks.

The City of Brooks is a community with a multi-cultural flavour unique to other municipalities in Alberta, boasting a population of 17,537. The city is steadily growing and has a youthful and energetic population with the median age of 33.8 compared to Canada's 39.8. 56.5 percent of residents have lived in the City of Brooks five years or more, demonstrating that residents are not transient, and people are proud to call the City of Brooks home. The city has a multitude of cultures and over 100 languages spoken, Brooks is home to one of the most culturally diverse populations per capita of Canada. Because of Brooks' unique diversity housing can be a challenge.

The Town of Bassano is on the western edge of the County 50km West of Brooks along Highway One. The town has a population of about 1400 people. In the Town of Bassano, a shortage of rental properties is affecting the community and the workforce. The Newell Housing Foundation offers the Rental Assistance Benefit program, lodge accommodations and a small number of seniors self-contained units in Bassano but offers no family rental accommodations at this time.

The Village of Duchess has a growing population with around 1050 residents. The Village is vibrant and family friendly with many families living in Duchess for generations. The Foundation offers the Rental Assistance Benefit to Duchess and 4 seniors-self-contained units are located there.

The Village of Rosemary is a small village with a population of 370 that prides itself on being a family-oriented community. The Foundation offers the Rental Assistance Benefit to Rosemary, and 6 seniors-self-contained units are located there.

The Newell Housing Foundation meets quarterly with housing stakeholders and service providers to discuss the needs and resources available in the City and County.

The Foundation's Board is passionate, cohesive, and engaged in Foundation business and support the Values and Mission of the Foundation. The properties are well maintained, and staff are conscientious and caring.

Over the years the demand and need for community housing has always exceeded the available units resulting in a continuous waitlist for the units. The Newell Housing Foundation is seeing a large number of families requiring 4 or more bedrooms in their units and a lack of larger housing is an issue throughout the region. Because of Brooks' diverse culture we are seeing a lot of larger 8-12 member families having difficulty finding housing. With the increase in larger families continuing to move to Brooks and surrounding areas this is a gap in the housing market. Funding for conversion of four of the community housing units has been requested in this plan as well as in previous years plans.

Climate Risk Assessment

As part of our environmental scan for the Newell Housing Foundation's business plan, we have evaluated regional climate hazards and their potential impacts on our operations and assets.

Flood Risk

The Foundation's properties lie outside designated floodplains and are not subject to such risks. .

Wind, Tornado and Hail Exposure

Despite minimal flood concerns, our area lies within a climatological corridor characterized by:

High winds

Annual gusts reaching 60–80 kmph during strong storm fronts.

Risks include damage to roofing, siding, exterior fixtures, and temporary power outages.

Tornadoes

On average, 1–2 tornadoes per year within a 100 km radius.

Potential for structural damage, debris hazards, and temporary displacement of residents.

Hailstorms

Frequent hail events from April through September.

Threats include broken windows, dented siding, and roof damage.

Potential Impacts on the Foundation

Physical infrastructure

Roof and exterior damage leading to increased maintenance and repair costs.
Temporary closures of office or residential units during recovery periods.

Tenant safety and comfort

Disruption of utilities (power, water) and resident services.

Operational continuity

Work delays following severe storms; potential loss of critical documents or IT systems.
Increased insurance premiums and deductible exposures.

Mitigation and Adaptive Strategies

Building Hardening

Install impact-resistant roofing and hail-rated windows.
Reinforce exterior walls and secure loose fixtures.

Emergency Preparedness

Develop and regularly drill tornado and severe-weather response plans.
Identify on-site safe areas and partner with local shelters, hospital etc.

Insurance and Financial Resilience

Maintain comprehensive wind, hail, and tornado coverage with appropriate limits.
Establish a contingency reserve fund for rapid repairs and resident support.

By proactively addressing these climate risks the Newell Housing Foundation will safeguard its assets, ensure tenant safety, and maintain operational continuity in the face of high winds, tornadoes, and hailstorms.



GOALS, STRATEGIC PRIORITY INITIATIVES, EXPECTED OUTCOMES AND PERFORMANCE MEASURES

Goal One:

Grow the inventory of Seniors and Community Housing for families in need.

Strategies:

- Explore potential partnerships with organizations such as:
 - Eastern Irrigation District
 - JBS Canada
 - Brooks Housing Society
 - Individual municipalities
 - Opportunities for financing through CMHC
- Explore where there may be land available for future Newell Housing Foundation assets
- Assess the future major maintenance requirements of Playfair Lodge
- Explore grant opportunities with the Provincial Government
- Explore possible financial leveraging of current assets to grow assets
- Assess opportunities and needs of the hamlets in the region
- Review the demographic trends for possible vulnerabilities and opportunities
- Assess opportunities whereby couples may live closer to each other and not be separated

Expected Outcomes:

Quality, affordable, and safe housing available in the region for all family sizes resulting in stronger communities. Smaller waitlists for community housing units and families housed in appropriately sized housing.

Goal Two:

Increase public and stakeholder awareness about the Newell Housing Foundation, its needs, its opportunities and its services. This helps ensure all facilities operated by the Newell Housing Foundation are operating at full capacity such that there are few vacancies on an ongoing basis.

Strategies:

- Communicate with the public about any vacancy opportunities
- Ensure all properties are maintained at high standards of physical condition
- Develop and present communication materials to all member council members
- Develop and distribute communication materials to the general public
- Develop and distribute regular communication materials to the staff and residents
- Develop and distribute potential partnership information to the business community

Expected Outcomes:

Minimal vacancies at all Newell Housing Foundation properties and community awareness of the Newell Housing Foundation facilities and programs.

Goal Three:

Complete the Bassano Connection Flats Independent Seniors Village such that it is fully operational and functional.

Strategies:

- Finalize the funding with the Provincial Government
- Complete the construction of the units
- Accept applications and approve appropriate residents
- Support the accepted applicants with the move in process

Expected Outcomes:

Seniors in Bassano and the surrounding area will have appropriate and safe housing in their community.



Goal Four:

Advocate for and secure funding to construct additional housing units in Duchess to help fill a growing need.

Strategies:

- Develop the vision for the need and the assets
- Assess the repurposing of the current units as part of the vision
- Identify community partners
- Work with the municipality to secure land
- Work with the provincial authorities, including the MLA, to implement the vision
- Develop an advocacy strategy to the Provincial Government

Expected Outcomes: Seniors in Duchess and the surrounding area will have appropriate and safe housing in their community.

Goal Five:

Continue to invest in our Staff and Board to ensure skills and knowledge are being continuously improved.

Strategies:

- Develop a Staff Personal Development Policy
- Research potential training and development opportunities for staff members
- Ensure an adequate budget available for staff Personal Development
- Continue to work with ASCHA (Alberta Seniors and Community Housing Association) and the Learning Center

Expected Outcomes:

Staff are continuously improving their knowledge and feel valued in their job.

Goal Six:

Develop a Legacy Fund plan.

Strategies:

- Develop a strategy to determine how to best utilize or manage a legacy donation, including securities
- Develop a strategy to educate the public on the benefits of donations
- Develop a strategy on how to donate any investment to the Newell Housing Foundation
- Assess fundraising possibilities to help grow the Legacy Fund

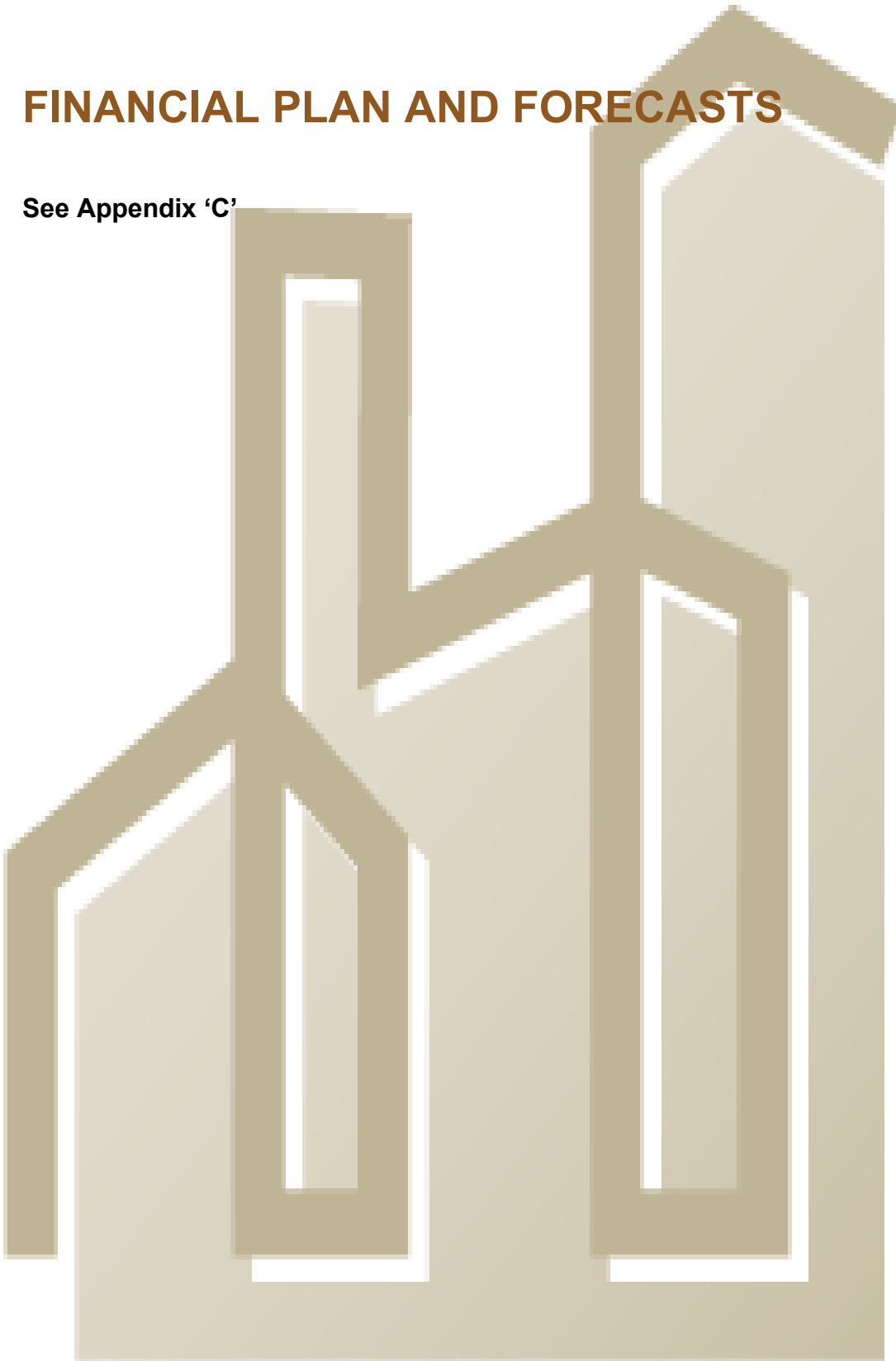
Expected Outcomes:

The public is aware of and utilizing donations through the Newell Housing Foundation.



FINANCIAL PLAN AND FORECASTS

See Appendix 'C'



CAPITAL PLANNING STRATEGY

Capital Maintenance

As the majority of the Newell Housing Foundation properties are owned by the Provincial Government Capital Maintenance for these properties fall to the Provincial Government. 29 projects are requested with this plan. Building Condition Assessments were completed on all Alberta Social Housing Corporation properties in 2025/2026. Capital Maintenance is not keeping up with the age and conditions of the buildings.

The Newbrook Lodge has completed a complete review and capital maintenance plan in 2025 which spans to 2054.

Capital Projects

The Newell Housing Foundation is in partnership with the Ministry of Assisted Living and Social Services begun working on 10-unit independent seniors living project, **Connection Flats**, in the Town of Bassano. This innovative project will have 10-seniors friendly Garden Loft homes featuring 22 safety and support features including; safety lighting, fall safe flooring, continuous grab rails and adjustable counters These units will also be equipped with embedded health scanning technology.



Rendering of Connection Flats project- Garden Loft

Following the success of the Connection Flats project in Bassano, the Foundation is also looking to partner with the Village of Duchess to construct additional units for

seniors in the Village of Dutchess. The Foundation currently has four units in Dutchess that are not well suited for seniors as there are no common areas and each unit has stairs to enter as well as a laundry room that is only accessible by exiting the unit, traveling down the stairs and sidewalk and entering up more stairs to a communal laundry room on the end of the building. This set up is especially concerning in Winter when ice and snow cause slipping hazards.

APPENDICES

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