IOOF SENIORS HOMES INC.
HOUSING ACCOMMODATIONS
INFORMATION PACKAGE

Heritage Place

Supportive Housing Accommodations

Housing Accommodations
Office
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Barrie, ON
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Website:www.ioof.com

Dear Applicant,

Thank you for your interest in considering the IOOF Seniors Homes Inc. for your next Housing Accommodation. This booklet provides some specific information relating to the services that are available, along with the costs to reside at Heritage Place.

The first step is to complete the IOOF Seniors Homes Inc. Housing Accommodations Application Form and return it to the Housing Accommodations Office so your name can be added to the wait list.

Once your name rises to the top of the wait list you will be contacted by the Housing Accommodations Office and scheduled to meet with the Director of Housing and Nutrition Services. At this meeting you will be asked to bring photo copies of the following documentation: proof of Canadian Citizenship, Power of Attorney Documents and your most current medication list. In order to determine eligibility an Inter RAI Community Health Assessment Tool will be used to establish a baseline of your health needs.

Rent-Geared-to-Income (RGI) assistance is available to those individuals that qualify. The subsidy relates only to the rent portion of the tenancy. It will ensure that your monthly rent will not be more than 30% of the total household income.
Rent Geared to Income Subsidy is available on one bedroom apartments only.

If you are applying for a Rent Geared to Income Subsidy you will need to bring **photocopies** of the following documentation when you are called for an interview/tour (once your name reaches the top of the waitlist).

LIST OF DOCUMENTATION REQUIRED

1. Current Personal Income Tax Return- Include all back up slips (T4A (OAS), T5 etc.)

2. Current Personal Tax Assessment from Canada Revenue Agency (In regards to your Current Personal Income Tax Return)

3. Current Investments Statements - showing the value of all assets. Include Statements for GIC's, Term Deposits, Tax Free Savings Accounts, Canada/Provincial Savings Bonds, etc.

4. Statements for ALL Investment Portfolio's - **For the Past Two Years** including listings and current value of all stocks even if no dividends. This includes any RRSP and RRIF Portfolios.

5. Detail for **ALL BANK ACOUNTS:** Note this must begin with the **Current Date and back 2 Full Years.**

6. Veteran's Pension Information

7. Verification of Current GROSS Pensions, as follows:
   Direct Deposit to Bank or Current Payment Statements for: OAS,CPP,etc.
   ALL Other Pension Statements showing Gross Monthly Payments
   All Disability Pensions
   All Foreign Pensions converted to Canadian Dollars
   Alimony Payments

8. "Rate Letter" from Service Canada (call 1-800-277-9914 to order).
   * This is required if you have a spouse (even if involuntarily separated) and is for confirmation of current CPP and OAS payments.

9. Written Evaluation of Current Property Values
   Include Principal Residence/Vacation/Cottage properties.
   Include Properties owned jointly with family/other individuals.

10. Written Evaluation of Current Property Values, include properties where ownership was transferred in the last **THREE Years.**

11. Documentation of selling price, if property sold in past **THREE Years.**

12. Documentation of where the income from the sale of the property went.

Please note that the Housing Accommodations Office does <u>not</u> provide photo copying service to applicants. Applicants are responsible for the cost to provide photo copied information to the IOOF Seniors Homes Inc. when applying for an apartment and also, if eligible, for a Rent Geared to Income Subsidy.

ADMISSION CRITERIA

The following specific criteria will apply:
Clients must be able to manage/direct their own care.
Clients must be cognitively aware of their surroundings and have the ability to direct their own care.
Clients must be ambulatory and/or have the ability to weight bear and assist with transferring.
Clients must be independent with bowel and bladder care.
Clients must be independent with eating.
Clients must be able to participate/assist with their activities of daily living.
Clients must be able to have their needs met by visiting professional care.
Clients must be independent at administering their own medications.

It is not the intention of Heritage Place to permit external professional services to provide care to individuals not able to meet the above criteria on an ongoing regular basis. Residents unable to meet the above criteria are required to transition to Long Term Care.

COST OF TENANCY
There are three components to the Heritage Place Occupancy Agreement:
Rent, Basic Support Package, and Additional Charges.

The monthly rate for market availability as of **January 2026** is as follows:

One person in a one bedroom apartment would pay (per month):
$1,599.09 + $608.78 = $2,207.87

Two persons in a one bedroom apartment would pay (per month):
$1,599.09 + $1,057.59 = $2,656.68

Two persons in a two bedroom apartment would pay (per month):
$1,829.33 + $1,057.59 = $2,886.92

Two bedroom apartments are rented at double occupancy only

BASIC SUPPORT SERVICES PACKAGE

Mandatory and Second Component of the Heritage Place Occupancy Agreement

The Basic Support Services Package is intended to support and encourage Heritage Place Residents to maintain their independence. This Basic Support Service Package is provided as a condition of tenancy. Details of the support services offered is included in the "**Support Service Agreement"** appended to and forming part of the Heritage Place Occupancy Agreement and signed by the Resident and their Guarantor.

The Basic Support Service Package has four services:
Support Services, Meals, Administration Fees and Emergency Response.

1. SUPPORT SERVICE PACKAGE
   As part of tenancy, the mandatory Support Service Package consists of 4.5 hrs per month of support for a single individual and 5 hrs of combined support for a couple.

2. MEALS
   The remaining portion of the Support Service Package is the meal plan, consisting of approximately 23 meals per month per person. (9 lunches and 14 dinners per month per person). Meals can be purchased over and above the basic meal plan.

3. ADMINISTRATION FEES
   Residents are charged a minimum monthly administration fee.

4. EMERGENCY RESPONSE
   All Residents are required to wear an Emergency Response Pendant. In the event that the Resident needs immediate assistance, they simply push the button on the pendant. This sends a wireless signal to a pager that is carried by Heritage Place

Support Service Workers. The pager indicates which apartment has sent the signal so that staff can respond and assist the Resident. There is also an Emergency Response Pull Station located in the bathroom in each apartment.

ADDITIONAL COSTS:
This is the third component of the Heritage Place Occupancy Agreement.

1. **Cable TV** is $55.00 per month which is compulsory as per the Housing Occupancy and Support Service Agreement.

2. **Laundry** Utilities cost is $20.00 per month. This is a compulsory charge.

3. **Parking** is available for an extra $20.00 per month.

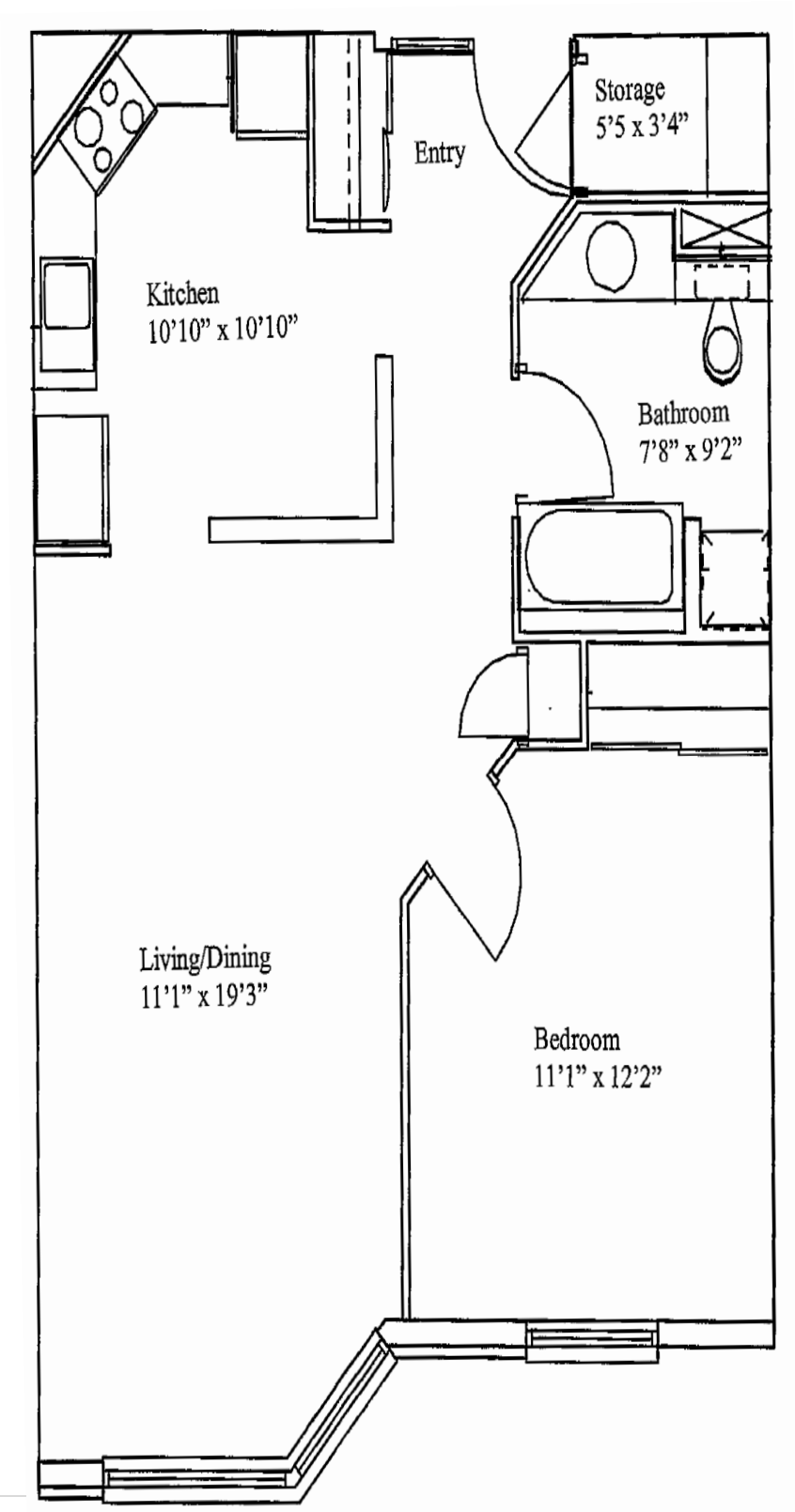
4. **Pharmacy Services**
   Residents are encouraged to use the contracted Pharmacy. The Pharmacy will provide free daily/weekly delivery service directly to Heritage Place. The cost of the Blister Card is determined by the Pharmacy based on the amount of medications that are taken. All costs for medications not included under the approved Provincial Drug Plan for Seniors shall be the responsibility of the Resident. This service has many benefits for both the Resident and the IOOF Seniors Homes Inc: i.e. Residents' medication lists are available to paramedics for effective medical attention at the hospital.

Additional Housing Accommodations Available

The Terraces at Heritage Square
Life Lease Resale Apartments for Independent Seniors available for purchase at 90 Dean Avenue and 94 Dean Avenue in the City of Barrie.

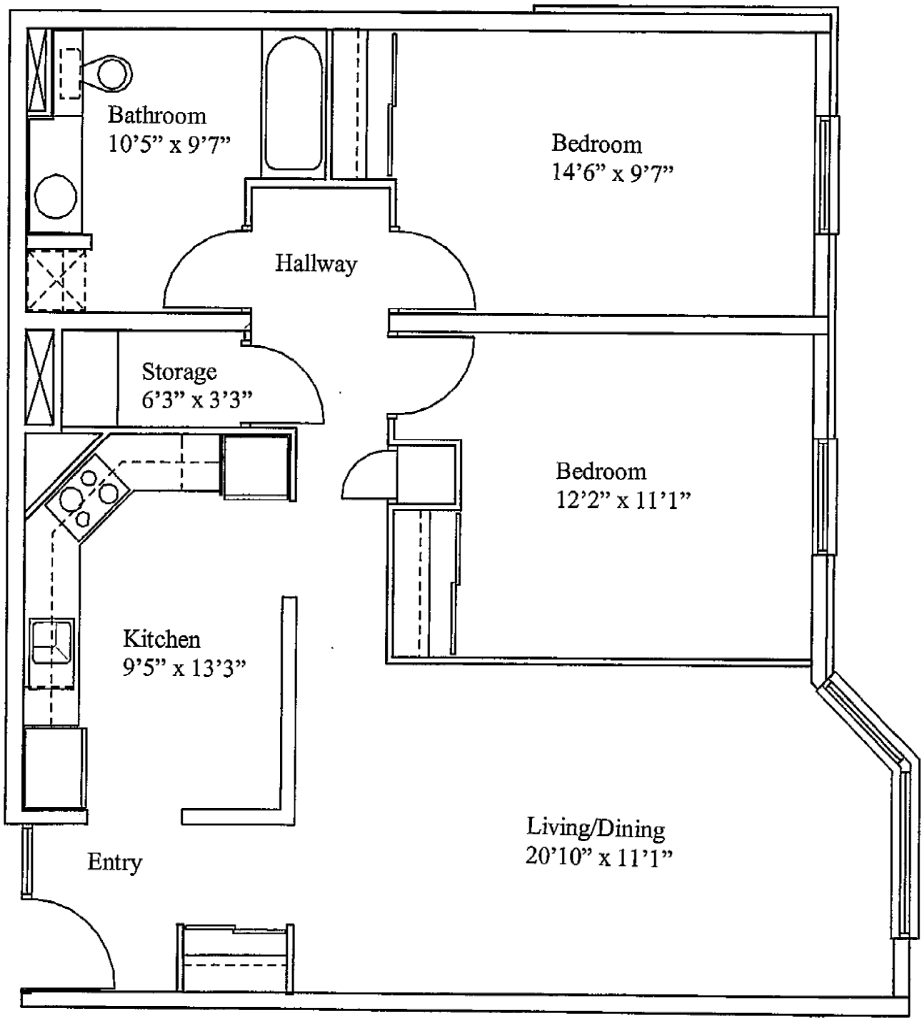
Please refer to IOOF Seniors Homes Inc. website for further information:
www.ioof.com

HERITAGE PLACE
ONE BEDROOM
638 sq. ft.



Typical One Bedroom Unit, Heritage Place – 638 sq. ft.

HERITAGE PLACE
TWO BEDROOMS
910 sq. ft.



Typical Two Bedroom Unit, Heritage Place – 910 sq. ft.