

BEST PRACTICES REVIEW –  
HOUSING CHOICES IN BC FOR  
PERSONS WITH DEVELOPMENTAL  
DISABILITES

April 2014



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# 1. Introduction

In 2012, the provincial government made a commitment to improve services and supports for British Columbians with developmental disabilities and their families. One of the areas identified was the examination of strategies and approaches for responding to existing and emerging housing needs. This included a focus on the role of families as well as an examination of potential strategies and opportunities to leverage existing resources, partnerships and investments to provide for an expanded range of housing choices for individuals with a developmental disability.

To assist with this project, Ministry staff engaged the services of Jim O’Dea (Terra Housing Consultants), Dale McClanaghan (McClanaghan & Associates) and Lorraine Copas (SPARC BC). Each of these organizations and individuals brings significant experience in the area of housing policy, housing research and planning and development including experience in working with persons with disabilities and their families.

The research team supported by members of the ‘home team’ and the ‘in studio team’ worked to identify the types of strategies and approaches that have been put into place by families, friends, allies and supporters of people with developmental disabilities. In undertaking this research the focus was on providing an expanded range of housing choices for persons with developmental disabilities with the central question as framed by the Journey of Families being “how can we leverage opportunities and resources to create homes of our own choosing?”

## Context

Families play a powerful role in the lives of their family member with a disability and can collectively play an increasingly powerful role in shaping policy in ways that positively impact the lives of all. Through the leadership of Molly Harrington, Assistant Deputy Minister Policy Branch of the Ministry of Social Development and Richard Faucher, Executive Director of the Burnaby Association for Community Inclusion, a group of families from across the province who represented family members with disabilities ranging in age from four to sixty five, came together to share their stories and insights. It was from this important first gathering in November of 2011 that the movement known as ‘The Journey of Families’ was born.

Since that initial gathering, thirty-five families and the organizations that support them, as well as provincial government representatives have participated in four (4) more sessions. These sessions started to explore ways in which families can work together to advance positive policy change for their family members as well as contribute to initiatives that can benefit all individuals with developmental disabilities.

The first session mapped the family’s journey, and highlighted how, and in what ways the system of government supports and services both enhance and detract from the family’s success. The next three sessions identified the elements of a successful journey and explored the need for a collaborative, solution focused space – a new approach that once created could help families, government and other stakeholders work together on an on-going basis to create a successful journey for all families.

## Elements

The four areas that were identified as important to the success of families included:

- Financial security
- Relationships
- Home
- Employment

Through the discussions with members of the Journey of Families, leveraging resources and opportunities to create homes of their own choosing was identified as a priority area for families.

## Approach

In working to identify ways to advance the key project elements as identified by family members, the approach that was developed involved the creation of an on-going solution focused space where families, government, service providers, business and community leaders could convene and collectively work to create solutions to support families in their journey and help contribute to a good life for their family member with a disability. Two key sub-groups within the Journey of Families were also created –the ‘home team’ and the ‘in studio team’.

- The ‘home team’ was tasked with the responsibility of looking deeply into the critical importance of safe and secure homes; and,
- The ‘in studio team’ was tasked to lead the creation of the on-going solution focused space.

The work of the two sub groups continues.

## *Key Areas of Focus*

The ‘home team’ issued a Request for Proposals and contracted with Terra Housing Consultants to identify the range of different housing options (formal and informal) that have been put into place around the province to respond to the specific housing needs of individuals with a developmental disability as well as the needs of their care givers and families.

In looking at the range of housing-related initiatives that have been put into place, the consulting team was asked to identify promising practices arising through a review of the existing housing and research literature as well as to conduct interviews with members of the ‘home team’ and others to develop a better sense of the full range of approaches that have been put into place within the BC context.

The 'in studio team' secured funding and support from the Community Living Innovation Venture to advance their efforts. The 'in studio team', which included families, government representatives and service providers spent two days with Jeff Barnum of Reos Partners to explore collaborative solution-focused problem solving approaches and to begin designing a framework for the on-going solution based space.

By working together and thinking about challenges in a different way, the members of the Journey of Families felt that it would be possible to identify alternatives and opportunities that could lead to better lives for people with developmental disabilities, their families and their caregivers.

### ***About This Report***

In looking specifically at the question of the housing needs and choices for persons with developmental disabilities, members of the 'home team' and 'in studio team' felt that it would be important to look at the question of how families and individuals with disabilities could leverage opportunities and resources to create homes of their own choosing, with a particular focus on:

1. Sharing and learning from insight gained through successful innovation and home choices;
2. Understanding how the different housing options work;
3. Understanding the conditions that made them possible; and,
4. Understanding if, and how these opportunities could be leveraged and replicated.

This report helps to identify the different types of choices that have been created.

This report was developed through a series of key informant interviews as well as face to face meetings with members of the 'home team' and the 'in-studio team' in order to understand more fully the types of housing choices that are important to families and individuals as part of their journey and to explore ways that families, society and public policy interventions can best come together to create and support positive housing outcomes for individuals with developmental disabilities.

## *What Individuals Want*

Through the research it became clear that individuals with developmental disabilities and their families who support them see housing as a priority. In looking at the specific needs of an individual with a developmental disability, a central focus of the 'home team' was on the creation of *a home* and not just housing. This was also reinforced through the key informant interviews. In particular, in looking at the different elements that were important to individuals and their families, there were a number of key themes that continued to emerge through the research including a desire for:

- Real choices;
- A sense of safety and security;
- A sense of belonging;
- A place of one's own;
- A place where one can be one's self;
- A safe and secure future; and,
- The ability to build strong and enduring friendships and relationships.

There was also a sense that having a place of one's own can help to provide the base or foundation for on-going learning, growth, and development. A place of one's own was also seen as a foundation from which other hopes, dreams and aspirations could be realized with some members of the 'home team' noting that embarking on this type of change is significant for both the individual and their family members. In addition, while many family members saw a place of one's own as an important milestone, they were also concerned about the need to ensure that appropriate supports were in place to protect the safety of their son or daughter and to ensure that their son or daughter could live on their own successfully.

## *Dimensions of Housing Need*

In a market-based system such as Canada, public policy interventions typically focus on responding to gaps in the existing system of services and supports. This includes the introduction of programs or initiatives that address needs that the market alone is not able to meet.

Within the Canadian housing system, questions related to housing need have typically focused on three (3) measures: *adequacy*, *suitability* and *affordability*. If one were to apply these different measures and standards to the specific situation of a person with a developmental disability, it is possible to look at these measures in the following way:

**Adequacy** – Adequacy typically includes considerations around the quality and condition of the housing. In the case of an individual with a developmental disability, questions related to adequacy might include considerations related to the degree to which the housing that is available adequately supports and promotes independence and inclusion as well as the extent to which the housing meets the individual’s basic needs around safety, security and accessibility.

Through the research it was noted that in some communities such as Powell River, concerns about the quality of the existing housing choices were a significant driver of need within the community with some members from the community reporting a severe shortage of accessible and affordable housing in the community. This has resulted in significant competition for the units that are available in the community and has meant that for some individuals with disabilities the housing choices that are available are more constrained.

**Suitability** – Suitability typically includes considerations related to the amount of housing that is being consumed and whether the housing that is available meets the specific needs of the family or individual. In the case of an individual with a developmental disability, suitability could include considerations related to the location of the housing and the extent to which the housing that is available supports opportunities for natural integration and inclusion in the community. In addition, considerations related to suitability could also include access to appropriate services and supports.

Through the research, it became clear that access to both formal and informal supports in the community can play a critical role in determining the range of housing choices that might be available as well as the potential for access to other opportunities. Our research also suggested that many of the successful models that were developed were those that took advantage of the natural supports in the community.

**Affordability** – Affordability considerations can also represent a significant challenge for families of a child with a developmental disability. Affordability typically includes considerations related to the extent to which the housing that is available is affordable to the individual or household based on the resources that they have available.

Affordability becomes a particularly important consideration for people with developmental disabilities who would like to have a place of their own. The literature shows that many individuals with developmental disabilities have limited access to employment opportunities and therefore have limited financial resources available to help cover the cost of their housing.

A general measure or benchmark for affordability establishes that housing should not cost more than 30% of a household's annual income. Therefore, even if an individual with a developmental disability is working full-time but only earning minimum wage, they would need to be able to find housing that does not cost more than \$470 per month for that housing to be affordable. For an individual relying on the shelter portion of their PWD benefits, their maximum housing allowance is \$375 per month.

### **Broader Considerations**

It was also clear throughout all of the discussions that housing-related considerations must go beyond the 'bricks and mortar' and reflect the many intangible aspects of 'home'. This includes the sense of autonomy and identity that having a place of one's own can help to create. It also includes linkages to the broader community and the importance of community connections (formal and informal) that go with it.

In thinking about the different housing-related elements, it is necessary to look at the types of factors or conditions that enable and support choice. This includes the ability for persons with a developmental disability and their family members to make choices that advance a life that allows for meaning and participation. This includes housing that is:

- Integrated into the community
- Designed to support genuine inclusion
- Accessible
- Enables and supports connections with needed services, supports and programs
- Responsive to the changing needs of individuals and families
- Responsive to the specific interests, preferences, aspirations and needs of the individual.

The housing choices that are created should also:

- Respond to the needs of individuals at different ages and different life stages;
- Support safety
- Provide for real choice
- Support long term housing stability and financial security.

Table 1 below shows how the different factors come together at the individual, family, and community level including the types of conditions or factors that can both affect and enable choice. Table 1 also highlights some of the different types of supports (formal and informal) that can come together to support real choice.



**Table 1: Factors Enabling and Affecting Individual Housing Choices**

	Factors Affecting Choice	Factors Enabling Choice
Individual	<ul style="list-style-type: none"> <li>• Disability</li> <li>• Sociability</li> <li>• Opportunities</li> <li>• Life stage</li> </ul>	<ul style="list-style-type: none"> <li>• Family support</li> <li>• Individualized support</li> <li>• Social and economic inclusion</li> <li>• Funding</li> </ul>
Family	<ul style="list-style-type: none"> <li>• Income</li> <li>• Resources</li> <li>• Assets/Wealth</li> <li>• Formal/informal supports</li> </ul>	<ul style="list-style-type: none"> <li>• Individualized support</li> <li>• Access to programs and services</li> <li>• Access to natural community supports</li> <li>• Support around transitions</li> <li>• Security of tenure</li> </ul>
Housing	<ul style="list-style-type: none"> <li>• Adequacy</li> <li>• Suitability</li> <li>• Affordability</li> <li>• Accessibility</li> <li>• Stability</li> <li>• Safety</li> <li>• Security of Tenure</li> </ul>	<ul style="list-style-type: none"> <li>• Accessible housing/accessible location</li> <li>• Mix of housing types</li> <li>• Mix of tenures</li> <li>• Access to housing assistance for those in need</li> <li>• Adaptive and flexible housing delivery models-shared services and supports</li> <li>• Connections to the broader community</li> </ul>
Community	<ul style="list-style-type: none"> <li>• Social &amp; economic inclusion</li> <li>• Safe, supportive environment</li> <li>• Sense of connection/inclusion</li> <li>• Access to appropriate services and supports</li> <li>• Location/transportation choices</li> </ul>	<ul style="list-style-type: none"> <li>• Mix of housing types and tenures</li> <li>• Targeted housing assistance</li> <li>• Supportive provincial and municipal regulations</li> <li>• Flexible responses</li> <li>• Access to appropriate programs and supports</li> <li>• Access to natural supports and amenities</li> </ul>

## 2. Key Partnerships and Relationships in the BC Context

British Columbia has been successful in building an extensive network of partnerships and relationships over the years to successfully respond to the diverse range of housing and support needs among people with developmental disabilities. Some of the successes have come through government-supported programs and initiatives while others have been the result of community effort, collaboration and innovation. Together, these efforts have helped to make British Columbia one of the leaders in this field.

This section provides an overview of some of the key partnerships and relationships that have helped to contribute to an expanded range of housing choices for people with developmental disabilities. This includes the efforts of families and service providers, as well as community leaders. It also includes partnerships with local builders/developers, the non-profit sector as well as the leadership and support of local government.

### *The Role of Families*

Family networks can play a powerful role in the lives of a family member who has a disability. Within the context of this research, our findings show that many families have demonstrated significant willingness and resourcefulness in working to create the best possible future for their children and have expressed a real interest and commitment in working to support their children in living a life that is full and complete. To do this, families view access to housing that meets their needs and that offers choice, self-determination, flexibility and opportunity as being an important part of the equation.

Many families have expressed a willingness to contribute equity and to take the types of actions that are needed to invest in the long-term future and financial security of their children. As a result, a central focus of this research is on how to best enable, support and facilitate these types of choices. Typically family-led initiatives have involved the purchase of an existing rental or ownership unit in their community and/or in another community.

Units acquired by families have typically been rented out at market rates with the cash flow generated through the rental of the unit helping to carry the cost of the housing and build equity over the longer term. In some cases, families have entered into different types of shared equity arrangements where they have partnered with other families who are in similar circumstances and have pooled their equity in order to purchase a home where their children can live together.

In some exceptional cases, families have been successful in purchasing duplex units and/or small multi-unit residential rental buildings that they are hoping will one day become a home for their son or daughter. The different models that have been identified have typically required families to be creative in their overall approach with the types of measures and actions that have been taken being driven by the desire to ensure that the long-term needs of their children can be met.

In looking at these different initiatives it was clear that the arrangements that have been developed are unique to the individual circumstances, resources, and support networks of the different families. As a result, it is difficult to talk about these types of initiatives in terms of scale or the ability to replicate. At the same time, more than one family was able to speak to these different types of models and approaches which they have taken with each of their individual stories being inspirational in terms of the sense of determination and commitment that is demonstrated by the families in ensuring that their son or daughter's future is secure.

Those who have engaged in this process also believe that there are potential lessons that can be learned or ideas that can be shared. They believe that by working in partnership with government, there are solutions that can be found that can help to facilitate the kind of future that families want for their children. In particular, the families who were part of the 'Journey of Families' have suggested that it is important to look at ways to leverage investments in RDSP's or use the province's PWD benefits as an annuity to help finance the purchase of a home to help provide for an expanded range of housing choices and increased housing stability for their child.

### ***Community Based Agencies and Service Providers***

Community-based partnerships and relationships also play a critical role in helping to enable and support real choice. Community-based partnerships and relationships include the diverse network of community-based agencies and services providers committed to ensuring that people with developmental disabilities have the services, supports and opportunities that they need to have a full and meaningful life and the ability to realize their full potential.

Among some of the key agencies and service providers that have been engaged in working toward innovation and solutions are organizations like Inclusion BC, PLAN (Planned Lifetime Advocacy Network), and the Vancouver Foundation. The network of community-based agencies and service providers across BC also plays a critical role in providing for a high quality of life for individuals with developmental disabilities as well as their families and caregivers.

Through this research, it became clear that community leadership contributed to the many innovations and initiatives highlighted in this report. This included collaboration between families, service providers, local government, community stakeholders and civil society. This section provides an overview of some of the strategies and initiatives that have been adopted at the local level including:

- Cohousing models;
- Partnerships with local developers/builders;
- Partnerships with local government; and,
- Partnerships with the non-profit and co-op housing sector including the exploration of life lease arrangements in existing non-profit and co-op housing developments.

The strengths and potential opportunities associated with each of these different strategies is outlined more fully below while additional details related to each of these different models and approaches can be found in Appendix B.

### ***Potential Opportunities Created Through the Use of Cohousing***

Our research shows that there are successful cohousing developments in more than fifteen different communities across BC. In addition, it has been demonstrated that cohousing model can help to provide an expanded range of housing choices for individuals with developmental disabilities, with this type of housing being used frequently in other jurisdictions such as Denmark.

Within the BC context, there have been two (2) specific cohousing developments which were created with an intentional focus on providing increased access to opportunities and inclusion for people with developmental disabilities. This included the Windsong development in Langley as well as Quayside Village in North Vancouver.

Co-housing is a unique form of housing development where people come together to form an “intentional community.” Housing developed under a cohousing model is designed to meet the diverse needs of those who have come together to create this housing with cohousing developments typically incorporating the following practices into their design:

- Participatory planning;
- Collaborative decision-making;
- Co-creation of space - design and layout;
- Use of different models and approaches for building community cohesion;
- Resident management and decision-making; and,
- Shared common spaces.

In the case of cohousing, one of the key features of this housing is the potential for improvements in the overall affordability profile of the housing that is created. In particular, the shared common areas and amenity spaces associated with the cohousing model provide one way of keeping costs down (both capital and operating) which in turn helps to contribute to the overall affordability of the housing.

One of the most important features of cohousing is the supportive and nurturing environment that is part of this model. In particular, this type of model can help to provide a natural support network for an individual with developmental disabilities living on their own and can help to promote increased safety and security while at the same time promote increased independence, autonomy and self-determination.

### ***Partnerships with Local Developers/Builders***

Establishing a partnership or relationship with a local developer/builder has been identified as another promising model that has been used by some groups. A good example is the model that was created by the Langley Association for Community Living (LACL). Under this model, the families worked together to establish a 'housing task group' that was able to articulate more fully the type of housing that they would like as well as the type of design features that should be incorporated into the housing.

The community met with a local developer/builder to explore potential opportunities for partnership including the potential to be part of a new condominium development that was in the planning stages. The developer/builder (Quadra) was open to the partnership and worked to incorporate some of the specific needs and preferences of the families into the design of the new development.

The engagement of the developer in the early stages of development helped to provide for an expanded range of housing choices by allowing family members and individuals to think about how the development that was being planned including the smaller unit sizes could help to meet their needs. It was also observed that the smaller units were more affordable both in terms of capital and operating. As a result, families were able to find housing that was more affordable (lower in cost) and better suited to the needs of their family member.

By entering into discussions in the planning phase, the developer was also able to go forward to the municipality and secure an exemption/reduction in the development cost charges for the units. This helped to lower the overall cost profile of the units by almost \$15,000 per unit. As well, the developer gave the families a price reduction of almost \$10,000 per unit to reflect the savings in the marketing and real estate fees that were typically incurred by the developer in marketing and selling the units.

It was also reported that the units that were developed had a significantly lower monthly operating cost profile when compared to the standard condo fee for other developments in the area. This below average monthly operating cost could be attributed to a number of different factors including the smaller unit size and improved operating efficiency. The lower monthly operating costs help to ensure the affordability of the housing over the longer term.

Some have suggested that the monthly operating costs could be further reduced if a municipality was willing to allow for a reduction or exemption in municipal property taxes for the units for a specified period of time. This was a strategy which was explored by the province in the context of the various Provincial/Municipal MOU agreements that were established in 2007/2008.

While each development is different in terms of the overall project economics and what is achievable, the examples profiled in this section highlight the importance of partnerships at the local level between residents, local builders/developers and local government.

There are also examples where the housing/service provider took on a more active developer/development role. This included the South Okanagan Association for Integrated Community Living, Powell River Association for Community Living and Semiahmoo House (Surrey). In each of these cases, the Society typically leveraged existing resources or assets to create the equity needed to help support the development of new housing.

In all cases, the housing that was developed was designed to provide an expanded range of housing choices for individuals with developmental disabilities and typically included housing that was targeted to households with different income profiles and rent levels. In some cases, the models that were developed relied on assistance from BC Housing in the form of low cost construction financing and/or an operating subsidy while in other cases a combination of cross-subsidy models and equity arrangements were used.

In all cases, the models have been successful in working their way through the equity challenges and typically have been successful in leveraging effective partnerships and relationships at the municipal and community level as well as across government. Appendix B includes additional information on the full range of models that have been developed including housing in Abbotsford, Burnaby, Kamloops, Kelowna, Langley, Langford, McBride, North Vancouver, Oliver, Osoyoos, Powell River, Surrey and Victoria.

## *Partnerships with Local Government*

Decisions made by local governments can also influence the range of housing choices available. In some municipalities, local and regional governments have adopted specific policies or measures to help improve housing affordability and reduce the cost of new housing construction. Many municipalities have also developed policies or initiatives to encourage a diversity of housing types with these measures typically helping to provide for an expanded range of housing choices at different points along the housing continuum.

In some cases, such as the City of Langford, the local government has adopted a policy where local developers are permitted additional density in exchange for making a percentage of the new units available at below market rates. The units are secured through a housing agreement that is registered on title and are available to eligible households living in the community.

The City's policy also requires that the housing that is developed incorporate 'visitable' design features. This type of requirement helps to ensure that the housing that is developed is accessible, thereby providing greater choice for individuals or family members with a developmental disability and who may have accessibility limitations.

In addition to these type of actions or measures, the following provides an overview of some of the other types of actions or measures that can be taken by local government to encourage an expanded range of housing choices and to respond to the full diversity of needs in the community:

- Amending existing bylaws to permit increased density in areas appropriate for affordable ownership or rental housing;
- Incorporating smaller, more affordable housing design into neighbourhood planning including smaller suites, smaller lots, coach houses, row houses, town houses "lock-off suites" as well as higher density developments;
- Adopting inclusionary housing policies or the use of density bonus provisions as a means of securing additional affordable rental or ownership stock;
- Reducing parking requirements for housing located in areas with good access to transit;
- Waiving or reducing development cost charges for new affordable housing units;
- Identifying City-owned sites which are appropriate for affordable housing and which could be leased at or below market value to non-profit housing organizations or service providers;

- Considering the use of density transfers or airspace parcels as a means of creating an expanded supply of affordable housing choices;
- Property tax exemptions or forgiveness for a period of time to encourage new affordable rental housing construction and/or to respond to specific needs in the community;
- Support in the development of affordable housing through neighbourhood and area planning processes as well as through the development of local housing actions plans and strategies; and,
- The inclusion of community space to support local social enterprises as part of the negotiated community amenity contribution secured through a re-zoning process.

In addition to the policy and regulatory context, it is also possible to look at different development, financial and operating incentives that can be used to improve the overall project economics and the cost profile of new housing construction. These are the types of measures that have been incorporated into different provincial/municipal MOU agreements that were entered into between the Province and some local governments including: Vancouver, Victoria, Kelowna, Surrey, Abbotsford, Campbell River, Maple Ridge and Nanaimo.

Within the context of these various agreements, the mix of incentives has typically included:

- Assistance with interim construction financing;
- Reductions in CMHC mortgage insurance;
- One-time capital funding;
- The use of municipal regulatory powers to leverage units or funding;
- A reduction in municipal fees or charges;
- A commitment to streamline the approvals process; and,
- Free land.

Each of these measures helped to improve the overall cost profile of the housing that was developed and contributed to the long term affordability of the housing by reducing the overall cost per unit. There are also a number of financial and operating incentives that can also help to contribute to lower monthly housing costs and contribute to improved affordability. These include:

- A dedicated rent supplement;
- A reduction in property taxes;
- Favourable interest rates and financing terms.

In each of these cases, it is clear that local partnerships play a critical role in providing for an expanded range of housing choices.



## ***Partnerships Within and Across the Non-Profit and Co-op Housing Sectors***

In addition to measures focused on adding new supply. There are also a number of possible measures that can help to make better use of existing resources. This includes potential partnerships with the non-profit and co-op housing sectors including the exploration of potential life lease arrangements in existing non-profit or co-op housing developments.

Under this type of arrangement a family could enter into an agreement with a housing provider that would allow them to purchase a life lease in an existing non-profit or coop housing development. This type of model could provide for an increased level of housing stability for an individual while at the same time ensure that the individual is living in a supportive environment. For the non-profit housing provider, this type of arrangement helps to create additional equity that can be used to meet other needs in the community.

Under a life lease arrangement the ownership of the unit remains with the not-for-profit organization and the non-profit society would be responsible for the day-to-day management. However, the leaseholder is entitled to a share in any appreciation in value over the term of their lease with the specific terms and conditions being set out in a re-sale control agreement registered on title.

Under a life lease model, an individual purchases their units for a specified amount and a specified period of time. Once the transaction has been completed, their leasehold interest is registered on title and the individual is entitled to live in the unit as well as share in some of the price appreciation. A standard model that has been developed by Terra Lumina establishes the leasehold period at 30 years less a day with this period being the maximum period of time allowed where the purchaser does not have to pay the property transfer tax.

While life lease models are not new, their use and application in the BC context is still relatively new. From a public benefit perspective, the inclusion of a re-sale control agreement means that the housing is likely to remain more affordable over time when compared to the local housing market. At the same time, this model allows the family and/or individual the ability to build some equity and which helps to provide for increased financial security and contribute to increased housing stability. Terra Housing has been doing some experimentation with this type of housing (especially as it relates to the needs of an aging population) and has been successful in working with community partners to establish successful life lease arrangements in both Abbotsford and Maple Ridge.

### *Establishing a Supportive Housing Network*

Another initiative that has been successful in working to make better use of existing resources is the development of a Supportive Housing Network (SPN) led by PosAbilities. This has included outreach into the community including the development of a supportive network of relationships with private landlords, family-owned housing, as well as social housing providers.

Through these networks, PosAbilities has been successful in finding housing for more than eighty individuals with developmental disabilities in communities all across Metro Vancouver. This has included a combination of strategies and approaches including:

- 20 individuals housed through rent supplement assistance ;
- 12 individuals housed in subsidized housing provided through BC Housing ;
- 30 individuals housed the private market;
- 13 individuals housed in rental suites in privately-owned family housing; and,
- 8 individuals housed in other types of housing arrangements.

Each of these different models speaks to the significant level of innovation within the sector as well as some of the promising practices and innovations that are emerging.

### 3. The Network of Services and Supports in the BC

Within the provincial government, there are also a number of important partnerships and relationships that have been established to support individuals with developmental disabilities and their families. They have included initiatives by CLBC, BC Housing, the Ministry of Housing, the Ministry of Social Development and the Ministry for Children and Family Development. The roles and contributions of each of these different ministries and agencies are outlined below along with an overview of the role of the Federal government.

This section also highlights some of the different housing and support arrangements that represent part of the current system of housing and supports for individuals with developmental disabilities. This includes an overview of group homes and staffed residential arrangements, supported and semi-independent living, home sharing, clustered living arrangements, as well as traditional social housing and subsidized housing units.

#### Provincial Ministries and Agencies

##### *Community Living BC (CLBC)*

Community Living British Columbia (CLBC) is the crown agency within the provincial government that is responsible for providing funding for services and supports to meet the needs of adults with developmental disabilities as well as those with FASD (Fetal Alcohol Syndrome Disorder) and Autism Spectrum Disorder who also have significant limitations in adaptive functioning. CLBC's purpose and focus is to support adults (19 or older) with developmental disabilities in leading fulfilling lives in welcoming communities and to work with key stakeholders and partners to facilitate and manage the network of services and supports that are available.

##### *BC Housing*

BC Housing is the crown agency within the provincial government that is responsible for the development, management and administration of subsidized housing across BC. This includes the day-to-day administration and management of the public housing stock as well as the administration of operating subsidies for the non-profit housing sector. BC Housing also manages a number of group homes and special needs housing units developed under a mix of housing programs. As well, BC Housing provides rent supplement assistance, access to low cost mortgage financing for new housing construction and delivers the province's HAFI (Home Adaptations for Independence) program.

Under the Home Adaptations for Independence Program (HAFI), the provincial government provides financial assistance to eligible seniors and people with disabilities to allow them to continue to live independently in their home.

The rules of the program establish that a household must have an annual income that falls below the provincial housing income limits for their area. In addition, the value of their home must be below established value limits. Eligible households are entitled to receive up to \$20,000 in assistance either in the form of a grant or forgivable loan.

### ***The Ministry of Housing***

In addition to BC Housing's role, the Ministry of Housing has also introduced a number of policies and program changes to better meet the housing needs of different groups and individuals in the community. These include:

- Changes to the Building Code to include additional accessibility measures as well as measures to allow for improved affordability;
- The development of the Home Adaptations for Independence Program outlined above.
- The development and facilitation of local housing solutions to provide an expanded range of housing choices (rental and ownership) for households with low to moderate incomes; and,
- Exploration of strategies and approaches to facilitate access to entry-level ownership opportunities for households with low to moderate incomes.

### ***The Ministry of Social Development***

The Ministry of Social Development provides income assistance and support for people with disabilities. The Ministry also works to support and facilitate attachment to the labour market and is responsible for leading the development and implementation of the *Province's Disability Services Strategy*. Under this Strategy the province is committed to providing a flexible, comprehensive and integrated system of support for British Columbians with disabilities including the identification of opportunities to allow people with disabilities to participate more fully in the social and economic life in their community. The government's Disability Services Strategy focuses on the following key areas: integrated citizen-centered service delivery, personal supports, housing, and initiatives to support accessibility and inclusion and employment and income.

## *The Ministry for Children and Family Development*

The Ministry for Children and Family Development (MCFD) provides funding for programs and services for children and youth with special needs. The services and supports provided through the Ministry are designed to provide special needs children with a high quality of life. MCFD also plays a role in service coordination and facilitation. This role includes initiatives to help facilitate and support transition planning for children entering and leaving school as well as other supports in the community. As an individual moves into adulthood, the responsibility for their support shifts from the Ministry for Children and Family Development (MCFD) to Community Living BC (CLBC).

## *The Role of the Federal Government*

### **The Federal Government**

The Federal government has a role to play in helping to meet the needs of individuals with disabilities as well as in providing for an expanded range of housing choices across communities through funding agreements with the provincial government. Typically this role has been in the form of one-time capital funding that is cost-shared with the provincial government with the specific terms and conditions being set out in a housing agreement. Under the current housing agreement which was entered into in July 2011, the Federal and Provincial government committed to funding of \$180 million over a three year period (2011-2014) to create more affordable housing options for British Columbians and to continue to reduce the number of households in housing need.

The Federal government also provides disability tax credits for eligible individuals and households and is responsible for the administration of the Registered Disability Savings Plan (RDSP). Through access to the Registered Disability Savings Plan, families are able to save for the long-term financial security of a family member with a disability.

To be eligible for the Registered Disability Savings Plan (RDSP) an individual must be under the age of sixty and must be eligible for the Federal Disability Tax Credit. The Registered Disability Savings Plan is structured in a way that allows the parents or guardians of an individual with a disability to contribute tax free into the plan with the Federal government providing a matching contribution.

Under the structure of the plan, the Federal government contributes \$3 dollars for every \$1 dollar contributed up to the first \$500 dollars. After that, the Federal government contributes \$2 dollars for every \$1 dollar contributed up to a maximum of \$3,500 dollars per year. If a family has an annual income that is above \$83,088, then the matching federal contribution is \$1 dollar for every \$1 dollar contributed up to a maximum of \$1,000 dollars per year.

For households with low incomes (\$24,183 or less) the Federal government will deposit \$1,000 dollars per year into the Registered Disability Savings Account (RDSP) even if no contribution is made. Likewise, for households with an income of between \$24,183 and \$41,544, assistance will be provided on a sliding scale based on a formula set out in the *Canada Disability Savings Act*.

Government contributions are based on the income of the family until the individual turns 19. After 19, the calculation is based on the income of the individual and the income of the family is no longer factored into the calculation. As a result, many young adults with developmental disabilities are eligible for a larger share of funding once the calculation is based on their income and not the income of their family. This additional funding can help to contribute to an expanded range of choices for the individual.

## 4. Existing Models and Approaches

The different government partnerships and relationships over the years have resulted in a number of different models of housing and support. This section highlights some of the current housing and support models that are in place as part of the system of support in the BC. This includes a focus on traditional models of housing and supports for persons with developmental disabilities including group homes and staff residential arrangements, supported and semi-independent living arrangements, home sharing arrangements, clustered living arrangements and traditional subsidized housing models.

### *Group Homes and Staffed Residential Arrangements*

Group homes and staffed residential housing is targeted to individuals who require a relatively high level of support including 24/7 staffing. Within the BC context, group home arrangements typically include three or four unrelated individuals living together. In looking at the history of these types of arrangements, it has been observed that in some cases individuals with developmental disabilities have really struggled to lead a fulfilling life in a group home setting. As a result, there has been a real push within the sector and among service providers to explore other possible service and support arrangements that are more personalized, less institutional in nature and more integrated in the community. Our research also shows that a number of housing/service providers have been able to speak to significant success in this area.

### *Supported/Semi-Independent Living Arrangements*

Supported living/semi-independent living includes housing and living arrangements where the supports are provided independent of the housing. Typically this type of arrangement is well suited to individuals who have low to moderate support needs and who are able to live relatively independently in the community. Under this model, the supports may be provided for a period of time and/or bundled in a way that allows people with similar needs to live in close proximity. This model has proven to be relatively cost effective with individuals living in this type of housing arrangement typically benefitting from the access to shared services. Our research also shows that housing and service providers have been very effective and creative in the different ways that they have been able to structure the services and supports in the community. This has included arrangements that have proven to be cost-effective as well as beneficial to clients and family members.

## ***Home Sharing/Life Sharing Arrangements***

Home sharing/ life sharing arrangements have a long history in the community living movement. Home sharing provides flexible arrangements that typically include both room and board. These arrangements can include anything from simply providing an individual with a place to live through to more active engagement and involvement in the daily activities of the individual.

While home sharing and life sharing models have resulted in many meaningful and long term relationships for individuals who require support, there are some in the community living movement who believe that home sharing arrangements are not for everyone and that, when asked, many individuals would prefer to live on their own (with support).

There is also the concern that one should not “force” a match and that successful home sharing arrangements come from actively working to find the best match or fit for the individual- an outcome that might take four to six months or even longer to achieve.

## ***Clustered Living Arrangements***

Clustered living arrangements are growing in popularity and typically include one or two people living in their own unit in a larger condominium, town house or apartment complex. These different types of arrangements can include the provision of services or supports on-site. The housing that is available through clustered living arrangements can fall under a number of different types of arrangements (including ownership and rental) and can include different types of partnerships and support arrangements from 24/7 supports through to drop-in or overnight services. In some cases, a service provider might provide on-site services through one of the units in the building.

There has been significant experimentation within the community living sector around different types of models and support arrangements within a clustered living model. In some cases, an individual might prefer to live on different floors or in different parts of a building in order to allow for a more complete sense of autonomy and independence. In other cases, the preference might be to cluster the units together in order to allow for shared services or supports. This could include overnight staffing and other types of on-site supports.

There were a number of good examples of this housing identified through this research. This includes both ownership and rental housing and includes a mix of different types of supportive arrangements. In all cases, the focus of this type of housing is to allow for as much natural inclusion and integration as possible while at the same time providing the services and supports that are needed to help ensure that the individual is able to live on their own successfully.



## ***Subsidized Housing***

Subsidized housing includes the different types of social housing models that have been created (public housing, non-profit housing and co-op housing). Subsidized housing can also include access to rent supplement assistance for housing living in the private rental market.

Access to social housing represents an important source of housing for many families and individuals who have a disability and who may have only limited access to the resources needed to find and keep suitable and appropriate housing in the private market.

Through access to social housing, eligible households may apply for housing assistance. This assistance can be in the form of access to a social housing unit or in the form of rent assistance. Under both of these models, the assistance that is provided helps to cover the difference between the cost of housing and the amount of rent that a household can afford to pay based on their income and the resources that they have available.

Both supply-side and demand-side responses have different roles to play in creating new affordable housing supply. Under the different housing supply program, most programs target housing assistance to low income households who are unable to find housing that they can afford in the private market with these programs addressing both issues of supply as well as issues of affordability in a single program.

Rent supplement assistance are demand side remedies that provide monthly assistance to enable individuals to find suitable housing in the private market. For a low-income single person household with only limited family support, having access to social housing or rent supplement assistance can be the difference between having a place to call home and living on the streets. Access to rent supplement assistance can contribute to increased housing stability and allows for an expanded range of housing choices in the private market and are extremely portable and flexible. Because of these features, rent supplement assistance has been referred to them as “gold” by a number of different housing and service providers.

## 5. Lessons Learned and Conditions for Success

Within the community living sector there has been a significant level of experimentation in the way in which services and supports can be structured including a concerted effort to provide for an expanded range of housing choices outside of the traditional institutional and group home models. Flexibility in funding as well as the ability to leverage existing assets and service arrangements has been instrumental in helping to facilitate and support a significant amount of innovation at the community level.

The research also showed that there are a number of successful partnership models that have been developed. These models have typically relied on the support of local government, the development community as well as housing/ service providers. In each of the cases profiled, the initiative came from the community with the groups and organizations involved in the development of these different models working closely with families and individuals in their community to develop a clear understanding of their needs and preferences.

The different models and promising practices that have been reviewed have been successful in working their way through the equity challenges and typically have succeeded in leveraging effective partnerships and relationships at the municipal and community level as well as across government. They have also been successful in working their way through the various legal, financial and technical challenges typically associated with new housing development.

Through the course of our discussions, it also became clear that a number of families are experiencing challenges in finding ways to navigate the complexities of the system. This includes the need for technical guidance and assistance around the range of potential housing and support options that might be available as well as different models that have been developed. Some families have also encountered challenges in understanding the specific requirements of the *Community Care and Assisted Living Act* especially as it relates to three (3) or more unrelated individuals living together.

Understanding potential strategies or approaches for responding to different regulatory or technical challenges that have been identified builds on one of the key themes that has continued to emerge through the discussions within the 'home team' and the 'in studio team'. This includes the need for a 'resource hub' or place where families can go to get technical guidance and assistance on a range of matters including information on the different housing/support models that might be available as well as guidance around compliance with the *Community Care and Assisted Living Act*.

In looking at some of the administrative complexities and challenges identified through this research, there was also some discussion about the potential opportunities and benefits that could be realized through changes to the *Human Resources and Facilities Act*. In particular, some housing and service providers have suggested that changes in the regulations could mean greater flexibility and responsiveness within the sector in adapting and responding to existing and emerging needs.

It was noted that in September 2001, the government took similar action when the restrictions under the *Housing Construction (Elderly Citizens) Act* were removed. These restrictions required a Society to pay one-third of the fair market value to government should it choose to dispose or change the use of a property. By removing these restrictions through repealing the legislation, government was successful in helping to build and strengthen their relationship with the non-profit sector while at the same time create additional capacity within the sector to better respond to existing and emerging needs.

Given there is already a precedent within government to consider changes of this nature and a positive outcomes arising from the decision, there may be an opportunity to explore whether similar changes to the provisions under the *Human Resources and Facilities Act* could generate similar positive outcomes and leverage.

## **Conclusions and Next Steps**

On April 12, 2013, the Journey of Families reconvened to review some of the preliminary finding to emerge through the research. In setting the context for the meeting, it was noted that the findings from this initial phase of work represented an important milestone in a much longer journey. The discussion focused on some of the key lessons learned as well as areas requiring further consideration and follow-up. The following points reflect some of the key lessons learned.

### **1. This initiative represents an important first step.**

Family-led innovation represents an important first step in working to expand the range of housing choices for individuals with developmental disabilities. The results of this effort also show that the collaborative solution-focused problem-solving approach developed by the ‘in-studio team’ has helped to create a space where individuals, organizations and government partners can come together to engage in conversations that can help to lead toward the development of viable solutions.

## **2. There is richness in the diversity of responses –large and small.**

The outcomes identified through this initiative revealed richness in the diversity of responses that have been formulated and the level of innovation demonstrated in a complex and challenging environment. The report and presentation prepared by the consulting team highlighted a broad range of responses both large and small. In sharing the findings with the ‘home team’ there was a strong sense that the types of incremental actions that have been taken can help to lead to the long-term future envisioned by families– a future that includes a sense of stability and financial security for their son or daughter.

## **3. There has been significant creativity and innovation across groups.**

There has been significant creativity and innovation across the groups in the community living sector with parents of children with developmental disabilities helping to carve new pathways of understanding and insight. This work builds on a long history of innovation that the sector has become known for. This includes initiatives like the development of the Registered Disability Savings Plan (RDSP) as well as access to inclusive education - two significant areas of innovation and accomplishment within the sector.

## **4. Families are looking to the future and want the reassurance that the well-being and needs of their children will be respected and protected.**

The Journey of Families came together to try to identify the types of actions or initiatives that families can take today that will help to provide their children with the type of future that they want down the road. Their interest in engaging in this initiative has helped to identify the types of actions that can be taken both at the individual level as well as across government to provide for a greater sense of security and reassurance around what the future may hold for their son or daughter. This means a place that their son or daughter can call ‘home’ over the long term.

## **5. It is not just about resources, the quality of the experience also counts.**

Families felt that it was important to emphasize that the discussion and the types of initiatives that are put into place should focus on the quality of the individual experience and that public policy decisions should go beyond counting resources to look more closely at the types of outcomes that are achieved through the investments that are made. Many housing/service providers also believe that by working partnership in a respectful and collaborative manner and by taking advantage of the innovation that exists within the sector, there are opportunities to make better use of existing resources and to leverage existing assets and resources in a way that can better meet existing and emerging needs both now and in the future.

## **6. New ways of thinking can help to remove barriers.**

Experience has shown that success comes from looking for changes within the system. Disincentives and barriers have to be removed in order to create the conditions needed to allow families and individuals to feel confident in contributing to the future success of their children. The “learning lab” approach adopted through this process is an important piece of the puzzle –helping to spur innovation and change. Through the Journey of Families process, it is clear that success comes when the end-user is part of the discussion and part of the innovation.

## **7. Incentives work.**

Past experience shows that incentives play an important role in helping to create policy change and in enabling and leveraging new resources and opportunities. There was a strong sense around the table that families are willing to play their role by investing their equity in housing for their children. However, it is their belief that there is power in working together and that their contribution and active participation should be encouraged.

## **8. Community and local leadership are two critical pieces.**

There was clear recognition through the process that community represents a critical piece of the solution. In particular, it was noted that community leadership has contributed to both important individual outcomes as well as important solutions. It was noted that community leadership has been instrumental both in terms of working across sectors and in terms of helping to lead change.

## **9. There are significant complexities that families need help to navigate.**

Participants in the process described some of the complexities within the current regulatory environment both in terms of some of the challenges associated with understanding and navigating the development process as well as challenges in understanding the requirements and provisions in the *Community Care and Assisted Living Act*. On more than one occasion, it was noted that families need a “resource hub” or place where they can go to access information and technical advice on the types of challenges that they are facing.

## 10. New ways of looking and seeing are needed.

One of the critical questions underpinning the discussion and conversation was whether existing resources could be used in a different ways. One example was whether it would be possible to re-characterize the PWD benefit in a way that could help to provide families with the ability to use this funding to help finance the purchase of a home (one that would help to provide a greater degree of housing stability and financial security for their child). Members also expressed an interest in exploring whether it would be possible to change the rules or regulations around the use of RDSP's to allow families to use this as a source of equity for financing the purchase of a home for their son or daughter.

The point was also made that while it is important to look for opportunities to replicate initiatives and scale up, it is also important to “scale down” and appreciate, the wisdom and expertise that exists across families and to tap into the diversity, ingenuity and innovation that is taking place at the individual and family level.

In terms of “next steps”, key recommendations and conclusions might include:

- **Information Sharing:** Continue to explore opportunities for information sharing and partnership including the potential creation of a resource hub.
- **Partnership Development:** Continue to work to build partnerships that can help to facilitate and expand the range of housing choices available including ensuring that appropriate strategies and initiatives are in place to respond to different individual, family and community needs.
- **On-going Support for Innovation:** Continue to work collaboratively to identify opportunities that make sense for families and individuals including exploring different types of housing and support models as well as administrative models (non-profit societies, trusts, co-ops) with a focus on enabling real choice.
- **Leverage Opportunities and Leadership:** Continue to work to leverage the knowledge, insights and experience of key partners around the table with a focus on both supply-side and demand-side solutions.
- **Maintain an Outcome Focus:** Work to move from an administrative and regulatory focus to one which is focused on outcomes including working to use existing investments, resources and relationships as a catalyst for generating new opportunities and supporting positive change for people and communities.

## 6. Technical Appendices

### **Appendix A:**

Housing Choices that Matter to Families (Stories Shared by Key Informants)

### **Appendix B**

Emerging Models and Initiatives

### **Appendix C:**

Community Level and Project Level Data

### **Appendix D:**

Supportive Recovery Homes Assessment Information and Criteria Checklist

### **Appendix E:**

Models and Approaches Adopted in Other Jurisdictions

### **Appendix F:**

Monthly Housing Costs in BC Communities

### **Appendix G:**

Selected References

## ***Appendix A: Housing Choices that Matter to Families (Stories Shared by Key Informants)***

In describing the types of outcomes they hoped to achieve, members of the *Journey of Families* shared stories from their own experience as well as reflections and observations about the potential opportunities that should be examined more fully through this research. In discussing the different dimensions of home, the following were some of the key observations and considerations that were shared:

- *Home means looking for ways to recognize everyone’s uniqueness and providing the types of supports needed to allow individuals to learn, grow and realize their full potential.*
- *Having a place of one’s own can help to provide control over one’s life – a place where one can express oneself and one’s identity.*
- *Making the transition to a place of one’s own choosing can help to foster a greater sense of independence, confidence and control over one’s life.*
- *The housing that is developed should reinforce and support connection to the wider community. If these conditions are not met, it could create yet another barrier.*
- *If given a choice, many individuals with a developmental disability would choose to have a place of their own (with supports) and that in some cases living independently is, in fact, the best model given the individual’s specific needs.*
- *For family members, safety and the assurance that supports are in place is an on-going challenge. Therefore, having access to natural supports including proximity to family, friends, and existing support networks can be critical to the success of any housing model that is created.*
- *Deeper community connections including the connection to broader goals such as employment, independence, and economic and social inclusion is critical.*
- *Not everyone has the same access to resources. Individuals who come from more affluent backgrounds will have a greater range of housing choices.*
- *Supportive strategies and natural support networks are an essential part of any solution with these different networks playing an important role in helping to ensure that individuals with developmental disabilities can succeed.*



## *Appendix B: Emerging Models and Initiatives*

The research also helped to identify a number of different successful partnership models that typically relied on the support of the local government, the development community as well as housing/service providers.

In each of these cases, the initiative came from the community with the groups and organizations involved in these different partnership models working closely with families and individuals in their community to develop a clear understanding of their needs and preferences.

Successful models have also worked their way through the equity challenges and typically have been successful in leveraging effective partnerships and relationships at the municipal and community level as well as across government

This section provides an overview of some of these different models to emerge through this research as well as identifies some of the factors or conditions that have contributed to their success. This section also highlights some of the specific conditions or circumstances needed to enable and support future success (scale and ability to replicate).

PROJECT DATA		
Family-led Initiatives		
Housing Option	Success Factor/Condition	Scalable
<p>Purchase of an existing rental or ownership unit in their community or another community</p> <p>The unit is typically rented out at market rates</p> <p>The cash flow generated through the rental helps to carry the cost of the housing and build equity</p> <p>Some families have also entered into shared equity arrangements with other families in similar circumstances.</p>	<p>Commitment and dedication of family members</p> <p>Individualized approach – recognizes and responds to the individual’s specific needs</p> <p>Supports individual choice and self-determination</p> <p>Shared equity agreements can be more complex both in terms of regulatory guidelines and legal requirements</p> <p>Three (3) or more unrelated individuals living together who require support fall under <i>Community Care and Assisted Living Act</i></p> <p>Compatibility of the individuals living together is also important as well as flexibility in the arrangements to adapt and respond to changing needs</p>	<p>Depends on the individual circumstances, resources and support networks of the different families</p> <p>There are success stories but the conditions and circumstances of each are unique</p> <p>Some families have adopted a long time horizon –i.e. actions taken today that will allow them to meet the future needs of their child 15 to 20 years down the road</p> <p>Access to equity (the down payment) and financing as well as the ability to carry the cost of the housing over the long term represents one of the biggest challenges for many families.</p> <p>Interest expressed among families as to whether it is possible to leverage investments in RDSP’s or to use the Province’s PWD benefit as an annuity to help finance the purchase of a home.</p> <p>Currently regulatory and tax implications limit these types of options. However, some families have suggested that planned giving or the creation of an endowment or trust might represent a potential strategy for addressing some of these issues.</p>

PROJECT DATA		
Group Homes		
Housing Option	Success Factor/Condition	Scalable
<p>Part of the traditional model of housing/supports</p> <p>Effective strategy for responding to individuals with high intensity of service needs</p> <p>In some cases, individuals and families have found that this type of housing best meets their needs</p> <p>In other cases individuals have struggled to have a good life in a group home</p>	<p>Experimentation around different ways to bundle services and supports</p> <p>Some service providers have been successful in creating different types of service and support arrangements that allow for better integration and inclusion in communities</p> <p>Changes have resulted in better housing outcomes –more personalized and individualized setting as well as a greater sense of community inclusion</p>	<p>There are a number of successful models that have been established</p> <p>There is significant expertise and experience across housing/service providers in the community living sector</p> <p>Not all families or residents want to make the change from a group home setting and may require support in making the transition</p> <p>Requires flexibility in the funding from CLBC and an effective partnership between CLBC, families and service providers</p> <p>Elimination of the constraints arising from the <i>Human Resources Facilities Act</i> may help to provide additional flexibility and increased capacity within the sector. Changes to the <i>Human Resources and Facilities Act</i> may help to create additional capacity to leverage resources to respond more effectively to existing and emerging needs.</p>

PROJECT DATA		
Clustered Living Arrangements		
Housing Option	Success Factor/ Condition	Scalable
<p>Part of the traditional model of housing/supports</p> <p>Typically include one or two people living in their own unit in a larger condominium, townhouse or apartment complex</p> <p>Can include ownership or rental units</p> <p>Can include the provision of services or supports on-site ranging from 24/7 supports to drop-in or over-night services</p> <p>Shared service model provides a cost effective approach for service delivery</p> <p>Some providers have been able to take individuals from a group home setting and help to structure these different types of arrangements that offer a higher quality of life.</p>	<p>Experimentation around different ways to bundle services and supports</p> <p>Some service providers have been successful in creating different types of service and support arrangements in communities</p> <p>Results in improved housing outcomes for individuals + contributes to a greater sense of community inclusion and engagement</p> <p>Shared service delivery model provides a cost-effective approach</p> <p>Housing model provides for a greater sense of independence and inclusion</p> <p>Access to services –either on-site or close proximity</p> <p>Housing should be located in an accessible area with good access to transit</p>	<p>There are a number of successful models that have been established</p> <p>There is significant expertise and experience across housing/service providers in the community living sector</p> <p>Some families and residents require support in making the transition to this type of housing arrangement (nervous about the change)</p> <p>Requires flexibility in the funding from CLBC and an effective partnership between CLBC, families and service providers</p> <p>Flexible in that the model can be adapted to either ownership (strata tenure) or rental units</p> <p>Resources (equity and financing) required for the purchase of a unit –sometimes the housing society must also purchase a unit to provide services on site</p> <p>Model can be implemented in combination with units acquired through municipal rezoning decisions (inclusionary housing policies and community amenity contributions). Some housing/service providers have used a cross-subsidy model.</p>

PROJECT DATA:		
Home Sharing/Life Sharing Arrangements		
Housing Option	Success Factor/Condition	Scalable
<p>Part of the traditional model of housing/supports</p> <p>Have a long history in the community living movement</p> <p>Flexible arrangements –can provide for meaningful/ long term relationships</p>	<p>Recognized as an important model for responding to existing and emerging needs</p> <p>Successful home sharing arrangements come from actively working to find the best match or fit</p> <p>Can contribute to a greater sense of community inclusion and engagement</p> <p>Has been used successfully in many instances.</p>	<p>These types of arrangements should not be forced-real effort must be invested in finding the right match</p> <p>Should represent one of a range of different potential options as not all individuals like to live with someone</p> <p>Some families feel vulnerable as their son or daughter is at risk of losing their home/sense of place if their arrangements change –i.e. if the home care provider makes a decision to make changes to the arrangements.</p> <p>Many families are interested in ensuring that their children have a sense of stability in their housing situation.</p> <p>Some families have expressed the concern that home sharing arrangements can be treated more like a business or transaction rather than the type of supportive relationship it was meant to be.</p>

PROJECT DATA:		
Shared Equity Arrangements		
Housing Option	Success Factor/Condition	Scalable
<p>Ownership or rental</p> <p>Typically done through clustered living arrangements as part of a larger development</p> <p>Makes use of shared services –on or off site</p> <p>Can include many different arrangements and administrative models.</p> <p>Models can include:</p> <ul style="list-style-type: none"> <li>- shared equity co-ops,</li> <li>- life lease arrangements,</li> <li>- lease to own,</li> <li>- purchase of a unit at below market rates with re-sale controls registered on title.</li> </ul> <p>These different models can also be part of many different types of administrative arrangements or structures –non-profits, co-ops, trusts</p>	<p>Requires significant technical, legal and development expertise</p> <p>Successful models are in place as well as significant experimentation within the sector</p> <p>Successful at promoting genuine inclusion, increased housing stability and increased financial security</p> <p>New housing developments typically incorporate considerations around accessibility/visitability features into the design</p> <p>Allows for expanded range of housing choices for persons with developmental disabilities.</p> <p>Some families have tried to purchase a home on their own and pool their equity –however this has resulted in some challenges or limitations vis a vis the <i>Community Care and Assisted Living Act</i> with three unrelated individuals living together – families are eager to find ways to overcome these challenges</p>	<p>Constraints can include access to funding, equity, and technical and legal expertise</p> <p>Community leadership/ support has typically contributed to the success of these development</p> <p>Timescale is also important with some of these developments being in the planning stages for six to nine years</p> <p>Contributions of land, zoning, density as well as the waiver of municipal fees and charges have also typically contributed to the success</p> <p>Some developments will require an on-going operating subsidy from BC Housing and/ or rent supplement assistance for individuals and households falling at the low end of the income distribution</p> <p>Some models have relied on the use of a cross-subsidy model to improve the overall project economics</p>

PROJECT DATA:		
Cohousing		
Housing Option	Success Factor/Condition	Scalable
Promising approach for providing expanded housing choices for individuals with developmental disabilities	Supportive housing environment/natural supports	Provides for an expanded range of housing choices but may not be for everyone
Collaborative participatory decision making both in the planning of the housing and in the day to day operations	Creates opportunities for natural inclusion	Constraints include access to funding and equity as well as technical and legal expertise including knowledge of housing development
Provides for a supportive and nurturing environment	Shared space/common areas can help to make the housing more affordable (capital and operating)	Community leadership and support has typically contributed to the success of this type housing
Successful models have been developed both within BC and elsewhere	Supportive municipal policies including contribution of land, zoning, density, as well as the waiver of municipal fees and taxes	Finding a suitable site can be a factor with competition with other forms of residential development including market condo developments which offer a higher return on investment
		Supportive municipal policies are key to ensuring the success of these types of initiatives

PROJECT DATA:		
New Housing Construction		
Housing Option	Success Factor/Condition	Scalable
<p>Ownership or rental</p> <p>Typically includes a mix of units targeted to different income and rent levels</p> <p>Units for individuals with developmental disabilities are included in the overall planning –integrated into a larger development typically through a clustered living model</p> <p>Unit mix can help to provide for a cross-subsidy for lower income households</p> <p>Some models have incorporated other types of shared equity arrangements into the planning - life lease arrangements, lease to own, and/or the purchase of units at below market rates with re-sale controls registered on title.</p> <p>This type of housing has included both partnerships with local builders/developers as well as Society-led developments using existing assets/resources as leverage</p>	<p>Technical, legal and development expertise</p> <p>Family engagement in the planning and decision-making</p> <p>Alignment of financial, development and operating incentives across key partners and stakeholders</p> <p>Interim construction financing, reduction in CMHC mortgage insurance, one-time capital funding</p> <p>Reduction in municipal fees or charges as well as fast-tracking the development approvals process</p> <p>Leveraging additional units/ funding through municipal regulatory powers as well as leveraging the assets/resources of the housing Society</p> <p>Provides for an expanded range of housing choices both in the form of affordable rental housing as well as entry level ownership</p>	<p>Constraints can include access to funding, equity, and technical and legal expertise</p> <p>Community leadership/support has typically contributed to the success of these development</p> <p>Timescale is also important with some of these developments have been in the planning stages for a number of years</p> <p>Supportive municipal policies as well as partnership with the Provincial government</p> <p>Some models have relied on the use of a cross-subsidy model to improve the overall project economics –this might be possible in some communities but the development economics can be different in different parts of the Province.</p> <p>Constraints imposed by the <i>Human Resources and Facilities Act</i> may place some limitations on the ability of housing provider to effectively leverage their resources and assets to create an expanded range of housing choices.</p>



**PROJECT DATA:**

**Municipal Partnerships and Relationships**

Housing Option	Success Factor/Condition	Scalable
<p>Municipal policies or strategies can include:</p> <ul style="list-style-type: none"> <li>-Amending existing bylaws to permit increased density in areas appropriate for affordable ownership or rental housing</li> <li>-Incorporating smaller, more affordable housing design into neighbourhood planning –smaller suites, smaller lots, coach houses, row houses, town houses, lock of suites.</li> <li>-Adopting inclusionary housing policies and the use of density bonus provisions as a means of securing additional affordable rental or ownership stock</li> <li>-Reducing parking requirements in housing located in areas with good access to transit</li> <li>-Waiving or reducing development cost charges for new affordable housing units</li> <li>-Identifying City-owned sites which are appropriate for affordable housing and make them available at below market rates</li> <li>-Consideration of the use of property tax exemptions for a specified period of time to promote improved affordability</li> </ul>	<p>Successful models are in place as well as significant experimentation –provides access to high quality housing and expanded choice</p> <p>Local housing action plans/ policies that promote increased housing diversity</p> <p>Use of inclusionary housing policies provides access to good quality housing in established neighbourhoods at below market rates (Langford is recognized as a good model for smaller communities)</p> <p>Waiving or reducing parking requirements can help to reduce the overall cost of new housing development. Structured parking can cost as much as \$40,000 per space.</p> <p>Waiving and reducing municipal fees can add to the overall affordability of the housing and help to bring down the cost</p> <p>Partnerships with local developers and builders have also been identified as a good model</p>	<p>Constraints can include access to funding, equity, and technical and legal and development expertise</p> <p>Community leadership/ support has typically contributed to the success of these development</p> <p>Contributions of land, zoning, density as well as the waiver of municipal fees and charges are important</p> <p>Some developments will require an on-going operating subsidy from BC Housing and/ or rent supplement assistance for individuals and households falling at the low end of the income distribution</p> <p>Successful models have also included different shared equity arrangements –i.e. life lease, lease to own and purchase of units at below market rates with a housing agreement registered on title</p> <p>Each community will be different in terms of the local market conditions, the development economics and the types of partnerships and relationships that can be established</p>

PROJECT DATA:		
Other Programs and Services		
Housing Option	Success Factor/Condition	Scalable
<p><u>Vancouver Foundation</u></p> <p>The Giving in Action (GIA) Society was established in 2006. It is an initiative of the Vancouver Foundation that supports individuals with disabilities and their families. Through this program, grants are provided to help individuals fully participate in their home and community as well as achieve financial security.</p> <p><u>Home Adaptions for Independence</u></p> <p>Established by the Provincial government to provide financial assistance to eligible seniors and people with disabilities</p> <p>Eligible households are entitled to receive up to \$20,000 in assistance either in the form of a grant or forgivable loan.</p> <p><b>Supportive Housing Network (PosAbilities)</b></p> <p><b>Outreach and support Work to build a supportive network of housing providers and connect people to housing</b></p>	<p>Since its inception, Giving in Action has donated \$40 million dollars across British Columbia</p> <p>Provides families with grants to support accessibility-related home renovations or vehicle purchases.</p> <p>Support allows people to continue to live independently in their home. Assistance is available to households with annual income below the provincial housing income limit for their area and where there home is below established value limits.</p> <p>Outreach and education</p> <p>Access to mix of different types of housing across communities</p>	<p>Originated in 2006 and has donated more than \$40 million dollars to families and individuals province-wide</p> <p>The HAFI program was made possible following the signing of a new Canada-B.C. affordable housing agreement (July 2011)</p> <p>The program provides \$15 million in funding and support over three years.</p> <p>Support for the work of the individuals and organizations</p> <p>Support for supply-side and demand-side solutions</p> <p>Document and share best practices</p>

## Appendix C: Community Level and Project Level Data

The following provides an overview of the different projects/developments that were originated and includes information on the different types of housing arrangements, the specific needs that were being met, the different type of opportunities and outcomes that were identified as well as some of the specific factors that contributed to the project's success.

PROJECT DATA: SHARED EQUITY ARRANGEMENTS	
<b>FAMILY-LED HOME OWNERSHIP</b>	
<b>HOUSING MODEL</b>	Purchase of a Duplex Unit
<b>RESIDENTIAL INFORMATION</b>	
Initiative	Family-led initiative
Location	Vancouver
Ownership	Shared equity purchase across three (3) families
Housing Type	Duplex with an accessory apartment
No. of Units	3 units/3 individuals
<b>OPPORTUNITY/OUTCOME</b>	
Initiated by three families in similar circumstances-decision to pool equity	
Focus was on creating expanded housing choice for their child	
Goal was to allow for new friendships, new relationships, expanded horizons for their children	
The house that was purchased was close to the family home to allow for informal supports	
<b>POTENTIAL LIMITATIONS/CONSTRAINTS</b>	
Need for flexibility to allow for changing interests/needs	
Not all families have the resources/equity needed to pursue this option	
Requirement of support raises regulatory issues -three (3) unrelated individuals living together	
Introduces requirements for compliance with the Community Care and Assisted Living Act	
Additional costs arising from the need for enhanced life safety measures	
Increased technical complexity because of regulatory requirements	
Policy question and taxation question about public funding/assistance creating private equity/benefit	

<b>CRITICAL SUCCESS FACTORS</b>
Potential long-term considerations about compatibility and sustainability of the arrangements
Individual needs or preferences may change
Resolution of taxation issues –investigation of the use of endowments, trusts, planned giving
Requirements for assistance in navigating the technical complexities/retrofit of the housing
Requirements for assistance in securing appropriate supports
Technical and legal advice required on potential tax implications
<b>OTHER CONSIDERATIONS</b>
Mortgage products support shared equity arrangements (Vancity Mixer Mortgage)
The unit is being rented out as families sort through the technical questions
The families purchased the unit before learning of all of the technical challenges
The families are still working through the technical and taxation questions
Other ownership or equity arrangements could also be explored i.e. non-profits, coops, trusts
It is more difficult to exit this arrangement if individuals want a change

<b>PROJECT DATA: SHARED EQUITY ARRANGEMENTS</b>	
<b>SOCIETY-LED/FAMILY-LED PARTNERSHIP</b>	
<b>HOUSING MODEL</b>	Transition from Group Home to Single Detached
<b>RESIDENTIAL INFORMATION</b>	
Initiative	Society-led/Family-led Initiative
Location	Abbotsford
Ownership	Family purchases the home/Society leases it back
Housing Type	Single detached home
No. of Units	1 unit/1 individual
<b>OPPORTUNITY/OUTCOME</b>	
Individual was previously living in a group home setting (very high needs)	
The Society worked with the family to find a suitable property	
The family purchased the home/the Society leased the home back	
Leveraged additional resources to create a better housing situation for the individual	
Used existing resources to create increased housing stability and financial security	
<b>POTENTIAL LIMITATIONS/CONSTRAINTS</b>	
Required a high degree of collaboration across different partners	
Not all families have the resources or equity needed to pursue this option	
Finding a suitable property in a suitable location could be a constraint	
Not all individuals would be in a similar situation in terms of the resources/supports	
<b>CRITICAL SUCCESS FACTORS</b>	
Supportive agency/service provider	
Flexibility from CLBC in restructuring existing service/support arrangements	
Not all families have the resources/ability to purchase a home	
Local housing market conditions can impact the range of choices available	
Requirements for assistance in securing appropriate supports	
Technical/legal expertise required to help structure the housing/support/lease arrangements	
<b>OTHER CONSIDERATIONS</b>	
This model may have the potential to be adapted/used elsewhere	
More expensive support models like groups homes provide the ability to restructure in some cases	
Other housing/service providers have moved individuals from group homes to other arrangements	
Redevelopment of existing group home properties may help provide expanded choices in some cases	
The <i>Human Resources and Facilities Act</i> has created barriers in some cases	

<b>PROJECT DATA: SHARED EQUITY ARRANGEMENTS</b>	
<b>SOCIETY/FAMILY SUPPORTED OWNERSHIP</b>	
<b>HOUSING MODEL</b>	Equity Coop
<b>RESIDENTIAL INFORMATION</b>	
Initiative	Kamloops Society for Community Living
Location	Kamloops
Ownership	Equity co-op
Housing Type	Different types of arrangements
No. of Units	5 units/5 individuals
<b>OPPORTUNITY/OUTCOME</b>	
Family-led initiative with the support of a service provider	
Families and friends formed a coop and contributed an equity share	
Formation of a coop helped to protect the individual's monthly income assistance	
The formation of a coop helped to provide increased housing stability and financial security	
The coop is the owner of record for the residential real estate	
<b>POTENTIAL LIMITATIONS/CONSTRAINTS</b>	
Not all families have the resources or equity needed to purchase a share in the housing	
Requires legal and technical expertise to establish	
The legal mechanism by which the rights and roles are spelled out is fairly complex	
This model relied on the use of pooled resources across different partners	
<b>CRITICAL SUCCESS FACTORS</b>	
Supportive agency/service provider	
Flexibility from CLBC in restructuring existing service/support arrangements	
Not all families have the resources/ability to purchase a home	
Flexibility in the ability to structure services and resources	
Technical and legal documentation	
Technical/legal expertise required to help structure the housing/support/legal arrangements	
<b>OTHER CONSIDERATIONS</b>	
This model was one of the 'early innovations' in the area	
Members build up equity incrementally –part of the monthly payments is applied to the housing	
Under this model, the individual does not hold title but they own shares	
This type of model can help to address issues of stability and financial security	

<b>PROJECT DATA: SHARED EQUITY ARRANGEMENTS</b>	
<b>SOCIETY/FAMILY SUPPORTED OWNERSHIP</b>	
<b>HOUSING MODEL</b>	Shared Ownership Arrangement
<b>RESIDENTIAL INFORMATION</b>	
Initiative	Community Living Society (CLS)
Location	Surrey
Ownership	Shared Equity Ownership
Housing Type	Townhouse Unit
No. of Units	1 unit/2 individuals
<b>OPPORTUNITY/OUTCOME</b>	
CLS helped to put this initiative into place	
The model was designed to help the individual to move from renting to owning	
The Society contributed 50% of the equity and the individuals each contributed 25%	
The Society worked to find a suitable unit (townhouse unit)	
The goal was to provide better housing and increased housing stability + some financial security	
<b>POTENTIAL LIMITATIONS/CONSTRAINTS</b>	
The Society assumed significant risk in this arrangement	
The arrangement did not last -the two individuals decided to end the arrangement	
The success of this model depends on the compatibility of the individuals	
This model relies on the use of pooled resources across different partners	
<b>CRITICAL SUCCESS FACTORS</b>	
Supportive agency/service provider	
Flexibility from CLBC in restructuring existing service/support arrangements	
Not all families have the resources/ability to purchase a home	
Flexibility in the ability to structure services and resources	
Technical and legal documentation	
Technical/legal expertise required to help structure the housing/support/lease arrangements	
<b>OTHER CONSIDERATIONS</b>	
This model was one of the 'early innovations' in the area	
This model shows that these arrangements don't always work as anticipated	

<b>PROJECT DATA: SHARED EQUITY ARRANGEMENTS</b>	
<b>SOCIETY/FAMILY SUPPORTED OWNERSHIP</b>	
<b>HOUSING MODEL</b>	Lease to Own
<b>RESIDENTIAL INFORMATION</b>	
Initiative	Powell River Association for Community Living
Location	Powell River
Ownership	Planning for Lease to Own
Housing Type	Multi-unit residential (six-plex)
No. of Units	6 units – 5 for rental (lease to own) and 1 for purchase
<b>OPPORTUNITY/OUTCOME</b>	
Model has been developed to respond to a need in the community	
Responds to a shortage of accessible housing in the community	
Model has been created to allow for the potential for a cross-subsidy	
The Society is also exploring the potential for a “lease to own” model	
Cross subsidy model provides an expanded range of housing choices + improved affordability	
Lease to own model would allow for increased housing stability and increased financial security	
<b>POTENTIAL LIMITATIONS/CONSTRAINTS</b>	
The Society is still working to sort out the model /project details	
The lease to own model means that they would not be able to access BC Housing financing	
This model requires the Society to be relatively sophisticated in their understanding	
The lease to own arrangements requires technical and legal documentation	
<b>CRITICAL SUCCESS FACTORS</b>	
Access to BC Housing financing helps to ensure that the housing is more affordable	
The Society sold an existing property to help create the equity needed	
The real estate costs in this community are relatively affordable	
Not all communities will have the same market conditions	
Technical/legal expertise required to help structure the housing/support/lease arrangements	
<b>OTHER CONSIDERATIONS</b>	
The Society is still working to resolve some issues around the housing model	
The Society has also indicated that it needs additional assistance on the legal/technical issues	



<b>PROJECT DATA: SHARED EQUITY ARRANGEMENTS</b>	
<b>SOCIETY/FAMILY SUPPORTED OWNERSHIP</b>	
<b>HOUSING MODEL</b>	Strata Tenure Development
<b>RESIDENTIAL INFORMATION</b>	
Initiative	South Okanagan Association for Integrated Community Living (S.O.A.I.C.L)
Location	Kelowna
Ownership	Society Owned
Housing Type	Mixed Strata Tenure Development
No. of Units	12 units
<b>OPPORTUNITY/OUTCOME</b>	
The Society used their experience in Oliver and Osoyoos to build a mixed strata tenure development	
The building included four (4) affordable units, four (4) life lease units, and four (4) market units	
The owner of the life lease units have a covenant registered on title	
The covenant requires that the unit is sold back to the Society if the individual chooses to move	
This type of model has created a real sense of pride of ownership among the residents	
Access to this type of housing also allows the individual to build equity over time	
The rental units rent for between \$400 and \$600 per month	
<b>POTENTIAL LIMITATIONS/CONSTRAINTS</b>	
Requires a significant level of technical, legal and development expertise	
There is significant financial risk to the Society in the developer role	
Access to equity and financing is challenging	
Support services are completely separate from the housing in this case	
<b>CRITICAL SUCCESS FACTORS</b>	
The experience of the Society played a role in the success of this initiative	
The Society had the ability to leverage existing resources and expertise	
This is the 3 <sup>rd</sup> development that has been completed by the Society	
The use of a cross-subsidy model helped to address affordability issues	
<b>OTHER CONSIDERATIONS</b>	

<b>PROJECT DATA: SHARED EQUITY ARRANGEMENTS</b>	
<b>SOCIETY/FAMILY SUPPORTED OWNERSHIP</b>	
<b>HOUSING MODEL</b>	Life Lease Arrangement in Existing Non-Profit Housing
<b>RESIDENTIAL INFORMATION</b>	
Initiative	Proposed
Location	Potential across communities
Ownership	Life Lease
Housing Type	Life Lease within an Existing Non-Profit Development
No. of Units	Requires further discussions/evaluation
<b>OPPORTUNITY/OUTCOME</b>	
Presents potential opportunities for synergies	
Non-profit societies have existing housing assets across communities	
Would help to support the goals of complete integration and inclusion	
Would help to create a supportive environment for the individual	
Would help to contribute to long term housing stability and financial security	
Life lease arrangement allows the individual to share in the appreciation in value	
<b>POTENTIAL LIMITATIONS/CONSTRAINTS</b>	
Supportive agency/service provider	
Flexibility from CLBC in restructuring existing service/support arrangements	
Not all families have the resources/ability to enter into this type of arrangement	
Flexibility in the ability to structure services and resources	
Technical and legal documentation	
Technical/legal expertise required to help structure the housing/support/lease arrangements	
<b>CRITICAL SUCCESS FACTORS</b>	
Requires the development of successful partnerships with the non-profit sector	
Requires equity contribution from families	
Requires flexibility in terms of the structure of the support arrangements	
If the life lease is for a period of 30 years less a day the property transfer tax can be avoided	
Technical/legal expertise required to help structure the housing/support/lease arrangements	
<b>OTHER CONSIDERATIONS</b>	
If the arrangement is done through a life lease the unit would not have to be stratified	
This type of model helps to leverage existing resources and assets	
This model could be tested on a pilot basis	
This model is currently being tested in the context of seniors' housing in Maple Ridge, Abbotsford	
Contributes to improved financial security	

<b>PROJECT DATA: CLUSTERED APARTMENTS</b>	
<b>SOCIETY/FAMILY SUPPORTED OWNERSHIP</b>	
<b>HOUSING MODEL</b>	Family Ownership/Shared Services
<b>RESIDENTIAL INFORMATION</b>	
Initiative	Victoria Association for Community Living
Location	Victoria
Ownership	Shared Ownership (3) families + 4th unit for a caregiver
Housing Type	Fourplex
No. of Units	3 independent living units + 1 unit for overnight support
<b>OPPORTUNITY/OUTCOME</b>	
Family-led initiative with the support of a service provider	
Creates the potential for better quality housing	
Housing is well integrated into existing neighbourhoods /natural supports	
Can contribute to better housing outcomes	
<b>POTENTIAL LIMITATIONS/CONSTRAINTS</b>	
Supportive agency/service provider	
Flexibility from CLBC in restructuring existing service/support arrangements	
Not all families would have the resources/ability to purchase a home	
Flexibility in the ability to structure services and resources	
The family would need to have the resources for the down payment and monthly carrying costs	
The housing society/service providers needs the resources to purchase a suite	
<b>CRITICAL SUCCESS FACTORS</b>	
Supportive municipal policies to enable a diversity of housing types/arrangement	
Increased housing density/allows for more affordable housing	
Families need the access to the financing and equity	
The housing/service provider played an important role in bringing the families together	
The housing/service provider required flexibility in the ways that they structured the supports	
Allowed individuals to move from a group home setting to a better arrangement in community	
<b>OTHER CONSIDERATIONS</b>	
Progressive municipal policies to enable increased housing diversity	
Strong partnership/relationship between the service provider/families	
Flexibility in structuring the support arrangements	

<b>PROJECT DATA: CLUSTERED HOUSING ARRANGEMENTS</b>	
<b>SOCIETY/FAMILY /DEVELOPER SUPPORTED OWNERSHIP</b>	
<b>HOUSING MODEL</b>	Purchase of Units in a Strata Tenure Development
<b>RESIDENTIAL INFORMATION</b>	
Initiative	Langley Association for Community Living (LACL)
Location	Langley
Ownership	Society Ownership
Housing Type	Scattered Units in a Strata Tenure Development
No. of Units	4 units: 3-1 bedroom units/ 1-2 bedroom unit
<b>OPPORTUNITY/OUTCOME</b>	
The Society established a housing task group to explore the range of potential housing options	
The Society helped to facilitate the meetings	
The family approached a local developer (Quadra) who worked with them	
The housing that was developed was designed to meet the specific needs/interests of the family	
The smaller units were also more affordable in terms of operating costs	
The Society helped to ensure that the appropriate services and supports were in place	
<b>POTENTIAL LIMITATIONS/CONSTRAINTS</b>	
Supportive agency/service provider	
Not all families would have the resources/ability to purchase a home	
Flexibility in the ability to structure supports on site	
Resources are needed for the down payment and monthly carrying costs	
<b>CRITICAL SUCCESS FACTORS</b>	
Supportive municipal policies (density + reduction in development cost charges)	
Ability to put appropriate support arrangements in place	
The Society played an important leadership/catalyzing role	
The Society/Developer were successful in building municipal support	
<b>OTHER CONSIDERATIONS</b>	
Project economics in the area enabled modest resources to leverage the opportunity	
The developer secured the waiver of the development costs charges (\$15,000/unit)	
The small unit size contributed to low monthly operating costs	

<b>PROJECT DATA: CLUSTERED HOUSING ARRANGEMENTS</b>	
<b>SOCIETY/FAMILY /DEVELOPER SUPPORTED OWNERSHIP</b>	
<b>HOUSING MODEL</b>	Purchase of Units in a Strata Tenure Development
<b>RESIDENTIAL INFORMATION</b>	
Initiative	Mennonite Central Communitas Supportive Care Services (MCCSCS)
Location	Kelowna
Ownership	Individual/Family Ownership
Housing Type	Scattered Units in a Strata Tenure Development
No. of Units	5 units: 4 for individual purchase/1 for live in support
<b>OPPORTUNITY/OUTCOME</b>	
Provided the opportunity for the individual to secure equity	
The Society purchased a suite in the building to provide for a life-in staff person	
The units were purchased on different floors and in different parts of the building	
The housing was designed to provide better quality housing and increased community inclusion	
<b>POTENTIAL LIMITATIONS/CONSTRAINTS</b>	
Supportive agency/service provider	
Not all families have the resources/ability to purchase a home	
Flexibility in the ability to structure services and resources	
Resources needed for the down payment and monthly carrying costs	
<b>CRITICAL SUCCESS FACTORS</b>	
Requires significant technical expertise from the Society	
Important to build positive relationships with other owners in the building	
The Society secured a seat on the strata council to protect the interests of families	
Potential for some individuals to feel isolated or excluded- need to find ways to address this	
<b>OTHER CONSIDERATIONS</b>	
This model was one of the early innovations	
Project economics in the area enabled modest resources to leverage the opportunity	
This model has been used and adapted by others	
Clustered living arrangements are a popular model	

<b>PROJECT DATA: CLUSTERED HOUSING ARRANGEMENTS</b>	
<b>SOCIETY MANAGEMENT OF RENTAL UNITS IN A STRATA TENURE DEVELOPMENT</b>	
<b>HOUSING MODEL</b>	Management of Units in a Strata Tenure Development
<b>RESIDENTIAL INFORMATION</b>	
Initiative	Community Living Society (CLS)
Location	Burnaby (City Club)
Ownership	Society Owned
Housing Type	Rental in a Strata Tenure Development
No. of Units	10 units – 1 bedroom/1 bedroom + den
<b>OPPORTUNITY/OUTCOME</b>	
Provides for increased inclusion/housing stability	
The initial tenants were group home tenants who wanted an apartment on their own	
There were ten suites on ten different floors in the building	
The units were rented at market but some tenants were able to get rent assistance	
<b>POTENTIAL LIMITATIONS/CONSTRAINTS</b>	
Supportive agency/service provider	
This project was the result of a partnership between CLS, CLBC and MCFD	
Flexibility in the ability to structure services and resources	
Living on their own can also create the situation where an individual can become socially-isolated	
<b>CRITICAL SUCCESS FACTORS</b>	
Requires significant technical expertise from the Society	
Important to build positive relationships with others in the building	
People have to be supported and encouraged to make the shift to this type of housing	
There needs to be flexibility in the funding model	
Access to rent supplement assistance can help to address some of the affordability issues	
<b>OTHER CONSIDERATIONS</b>	
This model was one of the early innovations	
This model was put into place more than 15 years ago and helps to show what is possible	
This model has been used and adapted by others	
The Society has done significant experimentation with this model and has had a number of successes	
Both the City of Burnaby and VanCity were partners in the project	

<b>PROJECT DATA: CLUSTERED APARTMENTS</b>	
<b>SOCIETY MANAGEMENT OF RENTAL UNITS IN A STRATA TENURE DEVELOPMENT</b>	
<b>HOUSING MODEL</b>	Management of Units in a Strata Tenure Development
<b>RESIDENTIAL INFORMATION</b>	
Initiative	Community Living Society (CLS)
Location	Burnaby (Burnaby Heights)
Ownership	Society Owned
Housing Type	Rental in a Strata Tenure Development
No. of Units	7-1-bedroom units
<b>OPPORTUNITY/OUTCOME</b>	
Provides for an expanded range of housing choices	
Provides for increased inclusion/housing stability	
Provides high quality housing in a mixed residential development in a high amenity area	
Facilitates the transition of individuals from group home arrangements to independent living	
Creates the potential for experimentation with different types of support arrangements	
Builds on the success and experience of the Society with this type of model	
<b>POTENTIAL LIMITATIONS/CONSTRAINTS</b>	
Supportive agency/service provider	
This project was the result of a partnership between CLS and Vancity	
The housing provider has significant experience in structuring these types of arrangement	
There is some nervousness among some families about moving to independent living	
Not all families can afford the rent and the Society has not been able to secure rent supplements	
<b>CRITICAL SUCCESS FACTORS</b>	
Requires significant technical expertise from the Society	
Important to build positive relationships with others in the building	
People have to be supported and encouraged to make the shift to this type of housing	
There needs to be flexibility in the funding model	
Access to rent supplement assistance can help to address some of the affordability issues	
<b>OTHER CONSIDERATIONS</b>	
This model builds on the Society's experience creating different housing/support arrangement	
It is an innovative project design in a highly desirable area	
The experience of the Society in managing "scattered unit" is a valuable asset	
The Society has done significant experimentation and has a number of successes	

PROJECT DATA: NEW HOUSING CONSTRUCTION	
<b>SOCIETY-LED DEVELOPMENT</b>	
<b>HOUSING MODEL</b>	Mixed Commercial/Residential Development
<b>RESIDENTIAL INFORMATION</b>	
Initiative	South Okanagan Association for Integrated Community Living (S.O.A.I.C.L)
Location	Oliver
Ownership	Society Owned
Housing Type	Mixed Commercial/Residential Development
No. of Units	2-2 bedroom units/1-3 bedroom unit
<b>OPPORTUNITY/OUTCOME</b>	
Provides for an expanded range of housing choices	
Provides for increased inclusion/housing stability	
Provides high quality housing in a mixed residential development	
The development was created in response to a shortage of affordable housing in the community	
The building included a combination of apartments and commercial spaces	
Leveraged the Society's expertise in real estate to create opportunities	
<b>POTENTIAL LIMITATIONS/CONSTRAINTS</b>	
Technical, legal, and development expertise	
High level of financial risk to the Society in assuming the developer role	
Not all Societies have the development expertise needed	
Constraints in terms of finding a suitable site	
Securing the necessary equity and financing	
<b>CRITICAL SUCCESS FACTORS</b>	
Requires significant technical expertise from the Society	
Flexibility in terms of the structuring of services and supports	
High level of family engagement	
Track record of success on the part of the Society	
Equity and assets that can be re-invested	
<b>OTHER CONSIDERATIONS</b>	
The development was able to provide affordable housing through the use of a cross-subsidy model	
The commercial unit creates the potential for a social enterprise	
The Society has done a significant amount of experimentation and has significant development expertise	



<b>PROJECT DATA: NEW HOUSING CONSTRUCTION</b>	
<b>SOCIETY-LED DEVELOPMENT</b>	
<b>HOUSING MODEL</b>	Mixed Commercial/Residential Development
<b>RESIDENTIAL INFORMATION</b>	
Initiative	South Okanagan Association for Integrated Community Living (S.O.A.I.C.L)
Location	Osoyoos
Ownership	Society Owned
Housing Type	Rental development
No. of Units	2-2 bedroom units
<b>OPPORTUNITY/OUTCOME</b>	
The Society used their experience in Oliver and developed a 2nd building in Osoyoos	
Provides for an expanded range of housing choices	
Provides for increased inclusion/housing stability	
Provides high quality housing in a mixed residential development	
The layout and configuration was more challenging so only one unit could be rented to a client	
The market unit plus the commercial unit helped to create a cross-subsidy for the rent	
The market rent was between \$500 and \$700 per month/The subsidized tenant pays \$400	
<b>POTENTIAL LIMITATIONS/CONSTRAINTS</b>	
There are no supports on site so the Society is more limited in terms of who can rent the unit	
The physical design of the building is more challenging so it was not possible to make the units accessible	
Access to equity and financing is challenging	
Development economics are different in different parts of the province	
This project may not be transferrable	
<b>CRITICAL SUCCESS FACTORS</b>	
Requires significant technical expertise from the Society	
Flexibility in terms of the structuring of services and supports	
The experience of the Society and the ability to leverage assets played a critical role in the success	
<b>OTHER CONSIDERATIONS</b>	

<b>PROJECT DATA: NEW HOUSING CONSTRUCTION</b>	
<b>SOCIETY-LED DEVELOPMENT</b>	
<b>HOUSING MODEL</b>	New Rental Housing Construction
<b>RESIDENTIAL INFORMATION</b>	
Initiative	Powell River Community Living Association
Location	Powell River
Ownership	Society Owned
Housing Type	Rental
No. of Units	30 accessible units (6 to 8 affordable units)
<b>OPPORTUNITY/OUTCOME</b>	
Responds to a shortage of affordable housing	
All units that are developed will be accessible	
The affordable units will be targeted to individuals receiving PWD assistance	
Purpose is to improve the quality of the housing and provide increased housing stability	
A number of individuals in the community are currently precariously housed	
<b>POTENTIAL LIMITATIONS/CONSTRAINTS</b>	
Project formulation –site, partners, funding, financing, equity	
Model development- pro-forma development, feasibility testing	
Closing the economic viability gap –finding adequate funding/sources to close the gap	
Access to appropriate supports	
<b>CRITICAL SUCCESS FACTORS</b>	
Supportive municipal regulations/incentives	
Access to equity and financing	
The ability to ensure that appropriate supports are in place	
<b>OTHER CONSIDERATIONS</b>	
Working to build effective partnerships –the provider, the province and the City	
Need to find a way to respond to a critical shortage of affordable and accessible housing	

<b>PROJECT DATA: NEW HOUSING CONSTRUCTION</b>	
<b>SOCIETY-LED DEVELOPMENT</b>	
<b>HOUSING MODEL</b>	New Rental Housing Construction
<b>RESIDENTIAL INFORMATION</b>	
Initiative	Semiamhoo House Society
Location	Surrey
Ownership	Society Owned
Housing Type	Rental
No. of Units	60 units: 1 and 2 bedroom units (20 for people with disabilities)
<b>OPPORTUNITY/OUTCOME</b>	
An extensive list of individuals have declared their interest to live in this housing	
Some families will purchase a life lease /others will need a subsidized unit	
The Society has invested time in developing an appropriate support plan for the individual and families	
The Society used an RFP process to find a potential builder/contractor (Marcon)	
The City of Surrey is willing to relax the development cost charges on the units if they are rental	
There is a high level of family engagement and access to good supports (co-location to supports)	
<b>POTENTIAL LIMITATIONS/CONSTRAINTS</b>	
Project formulation –site, partners, funding, financing, equity	
Model development- pro-forma development, feasibility testing	
Closing the economic viability gap –finding adequate funding/sources to close the gap	
Access to appropriate supports	
<b>CRITICAL SUCCESS FACTORS</b>	
Supportive municipal regulations/incentives –waiver of development cost charges	
Access to equity and financing including low cost construction financing from BC Housing	
Technical and development expertise (the Society owns the land but does not necessarily have expertise)	
The ability to ensure that appropriate supports are in place	
<b>OTHER CONSIDERATIONS</b>	
The Society has been working on a long term plan (secured nine parcels of land – 1 per year)	
The Society has a high level of family engagement and a clear sense of purpose	
Goals of the Society -Ensure that people with disabilities can live a self-directed life in the community	
Belief that people should have the ability to direct their own lives and make informed choices	
Commitment to ensure that people live in an integrated environment	
Belief that people should have the ability to choose where and with whom they live	

<b>PROJECT DATA: COHOUSING DEVELOPMENT</b>	
<b>COHOUSING DEVELOPMENT- QUAYSIDE VILLAGE</b>	
<b>HOUSING MODEL</b>	Cohousing
<b>RESIDENTIAL INFORMATION</b>	
Initiative	Quayside Village Cohousing Development
Location	North Vancouver
Ownership	Cohousing
Housing Type	Cohousing
No. of Units	5 units -4 below market /1 subsidized rental 19 units in total
<b>OPPORTUNITY/OUTCOME</b>	
Quayside Village represents a vibrant cohousing development	
Four units have been made available at below market rates (20% below)	
Also includes provisions for one (1) subsidized rental unit	
Integrated into an existing neighbourhood with natural supports	
Use of density bonus provisions and parking relaxation to help reduce the cost of the units	
<b>POTENTIAL LIMITATIONS/CONSTRAINTS</b>	
Supportive and experienced municipality	
City incentives/contributions helped to improve the cost profile	
BC Housing also contributed assistance	
Access to supports	
<b>CRITICAL SUCCESS FACTORS</b>	
Supportive municipal regulations/incentives –use of density bonus provisions/relaxation of parking	
Access to equity and financing including rent assistance (BC Housing)	
Technical and development expertise	
The ability to ensure that appropriate supports are in place	
<b>OTHER CONSIDERATIONS</b>	
The City of North Vancouver has a solid track record in working to create affordable housing	
Support for the cohousing model helps to demonstrate some of the potential/power of this model	

<b>PROJECT DATA: COHOUSING DEVELOPMENT</b>	
<b>COHOUSING DEVELOPMENT- QUAYSIDE VILLAGE</b>	
<b>HOUSING MODEL</b>	Cohousing Model
<b>RESIDENTIAL INFORMATION</b>	
Initiative	Cohousing
Location	Scattered Locations
Ownership	Cohousing
Housing Type	Cohousing
No. of Units	Varies
<b>OPPORTUNITY/OUTCOME</b>	
There are a number of different cohousing developments across BC	
Cohousing provides a supportive environment and frequently has a lower operating cost profile	
There have been more than 15 different cohousing developments created	
Cohousing provides many different social opportunities and activities as well as support	
Provides the ability to take advantage of the natural supports	
<b>POTENTIAL LIMITATIONS/CONSTRAINTS</b>	
Cohousing might not be for everyone	
Cohousing relies on collaborative planning and decision-making	
Not everyone will have access to the financing and equity that is needed	
Access to supports	
<b>CRITICAL SUCCESS FACTORS</b>	
Supportive municipal regulations	
Access to equity and financing	
Technical and development expertise	
The ability to ensure that appropriate supports are in place	
<b>OTHER CONSIDERATIONS</b>	
There are currently fifteen different cohousing developments across BC including Bowen Island, Burnaby, Courtenay, Victoria, Sooke, Lumby, Nanaimo, North Vancouver, the Sunshine Coast, Qualicum Beach, Vancouver, Langley, and Abbotsford	
Windsong and Quayside Village have both demonstrated that this model works well for helping to respond to the needs of people with developmental disabilities	
Cohousing has also been used successfully in Denmark and other jurisdictions	

<b>PROJECT DATA: NON-PROFIT HOUSING DEVELOPMENT</b>	
<b>SOCIETY-LED DEVELOPMENT</b>	
<b>HOUSING MODEL</b>	Non-Profit Housing Development
<b>RESIDENTIAL INFORMATION</b>	
Initiative	Quay View Housing
Location	North Vancouver
Ownership	Non-Profit Housing Society
Housing Type	Social Housing
No. of Units	Mix of 1 and 2 bedroom units
<b>OPPORTUNITY/OUTCOME</b>	
Joint project between North Shore ConneXions Society and the City of North Vancouver	
Supports are provided through the North Shore ConneXions Society	
Half of the units are subsidized and half are rented at market rates	
All of the units in the building are fully accessible	
The building is well located –close to services and amenities	
The subsidized units are based on income while the market units rent for \$800 to \$1000 per month	
<b>POTENTIAL LIMITATIONS/CONSTRAINTS</b>	
The City of North Vancouver provided the land for the project	
BC Housing provides the operating subsidy for the units as well as funding for on-going maintenance	
There is a long waiting list for the units	
Some individuals have found it difficult to make the transition to this type of housing	
<b>CRITICAL SUCCESS FACTORS</b>	
Supportive municipal regulations/incentives –contribution of the land	
Access to equity and financing and on-going operating subsidy (BC Housing)	
Technical and development expertise	
The ability to ensure that appropriate supports are in place	
<b>OTHER CONSIDERATIONS</b>	
Supports the goal of genuine inclusion	
Cross-subsidy model helps to promote income and social mix plus social integration	
The cross subsidy model helps to improve the overall economic viability of the project	
The cross subsidy model helps to reduce the amount of operating subsidy needed	

PROJECT DATA: NON-PROFIT HOUSING DEVELOPMENT	
<b>SOCIETY-LED DEVELOPMENT</b>	
<b>HOUSING MODEL</b>	Non-Profit Housing Development
<b>RESIDENTIAL INFORMATION</b>	
Initiative	Hyad Place
Location	North Vancouver
Ownership	Non-Profit Housing Society
Housing Type	Affordable Rental
No. of Units	16 units: 14 units for young adults/2 for on-site staff
<b>OPPORTUNITY/OUTCOME</b>	
The title of the land was transferred from the School District for \$1	
The development was designed to respond to a broad range of incomes and needs	
Families each contributed approximately \$40,000 in equity (\$166,000 in total)	
All of the units are fully accessible and will provide access to stable and affordable housing	
The families came together to try to make it happen with nine units having deep subsidy	
<b>POTENTIAL LIMITATIONS/CONSTRAINTS</b>	
The City of North Vancouver contributed zoning, community amenity contributions and dcc waiver	
BC Housing provides an on-going operating subsidy	
Some families would prefer more integration –concern that this model might isolate individuals	
<b>CRITICAL SUCCESS FACTORS</b>	
Supportive municipal regulations/incentives –contribution of density, dcc waiver	
Access to equity and financing and on-going operating subsidy (BC Housing)	
Technical and development expertise	
High level of family engagement	
<b>OTHER CONSIDERATIONS</b>	
Contribution of land from the school district	
It took the families almost nine (9) years to leverage the equity and resources	
The Province through BC Housing contributed approximately \$5.3 million	

<b>PROJECT DATA: NON-PROFIT HOUSING DEVELOPMENT</b>	
<b>SOCIETY-LED DEVELOPMENT</b>	
<b>HOUSING MODEL</b>	Non-Profit Housing Development
<b>RESIDENTIAL INFORMATION</b>	
Initiative	McBride Seniors' Housing Development
Location	McBride
Ownership	Non-Profit Housing Society
Housing Type	Non-Profit Housing Development
No. of Units	1 unit
<b>OPPORTUNITY/OUTCOME</b>	
McBride received funding through BC Housing to develop a seniors' housing complex	
The Society made the decision to include one unit for someone with a developmental disability	
The unit was created so it would be near the common area to create a real sense of inclusion	
There was the sense that the design allowed the model to work	
There was also the sense that this might be a good model for smaller communities	
<b>POTENTIAL LIMITATIONS/CONSTRAINTS</b>	
The needs of individuals with developmental disabilities and seniors can be quite different	
There is the need to ensure that there is true integration and inclusion	
Some expressed concerns about ensuring that the individual does not feel socially isolated	
<b>CRITICAL SUCCESS FACTORS</b>	
Commitment to good design and clarity around the different needs	
Access to equity and financing and on-going operating subsidy (BC Housing)	
Technical and development expertise	
High level of community engagement	
<b>OTHER CONSIDERATIONS</b>	
This model might represent a good model for smaller communities	



<b>PROJECT DATA: MUNICIPAL ZONING AND REGULATORY DECISIONS</b>	
<b>INCLUSIONARY HOUSING POLICIES</b>	
<b>HOUSING MODEL</b>	Entry-level ownership units
<b>RESIDENTIAL INFORMATION</b>	
Initiative	City of Langford
Location	Langford
Ownership	Entry-level Ownership (Below Market Rates)
Housing Type	Row House Unit
No. of Units	1
<b>OPPORTUNITY/OUTCOME</b>	
The Langford Housing Program (introduced in 2004) requires 1 affordable unit/ 10 units developed	
The units are priced at below market rates (60% of market)	
The policy was revised in 2007 to include the requirement that the unit be suite-ready	
The revised policy also included that requirement that the unit include “visitable design features”	
The family was able to buy into the development for \$150,000	
The development had a ‘re-sale control agreement’ registered on title	
Provided an expanded range of housing choices	
<b>POTENTIAL LIMITATIONS/CONSTRAINTS</b>	
Not all families have the resources/equity to pursue this option	
There is the need for flexibility in structuring support arrangements	
There was price appreciation –the units as of 2008 were equal to approximately \$165,000	
The program has income limits that determine eligibility for the program (annual income \$50,000)	
The household must have a pre-approved mortgage (and provide information on their income)	
<b>CRITICAL SUCCESS FACTORS</b>	
Supportive municipal regulations (inclusionary housing policy)	
Access to financing includes having a pre-approved mortgage and proof of employment	
Ability to put appropriate supports in place	
Flexibility in structuring services and resources	
<b>OTHER CONSIDERATIONS</b>	
Legal agreements and documentation (families will have to understand re-sale control provisions)	
The development economics are different in different parts of the province	
The same model might not work in other part of the province	
The re-sale agreement allows the individual/family to build equity	

<b>PROJECT DATA: MUNICIPAL ZONING AND REGULATORY DECISIONS</b>	
<b>PROVINCIAL/MUNICIPAL MOU AGREEMENTS</b>	
<b>HOUSING MODEL</b>	Provincial/Municipal MOU Agreement
<b>RESIDENTIAL INFORMATION</b>	
Initiative	Partnership Between Province/Local Governments
Location	Different locations
Ownership	Provincial ownership
Housing Type	Supportive housing
No. of Units	More than 1,900 units created across eight communities
<b>OPPORTUNITY/OUTCOME</b>	
Create supportive housing units in partnership with the municipality	
City identifies the sites and contributes the land (long term lease)	
Agreement to waive all municipal fees and charges	
Site exempted from the payment of property taxes	
Provinces covers all technical/pre-development costs –architectural, geotechnical, environmental	
Sites typically leased back to a non-profit provider for a nominal fee	
<b>POTENTIAL LIMITATIONS/CONSTRAINTS</b>	
Competition with other needs (i.e. the MOU agreements were focused on addressing homelessness)	
Initial pilot initiatives (2007) was over-subscribed	
Each municipality will be different in terms of the assets that they can bring to the table	
Requires significant understanding of the development process/technical expertise	
<b>CRITICAL SUCCESS FACTORS</b>	
Supportive municipal regulations/policies	
Ability to find suitable partnerships and relationships	
Ability to put appropriate supports in place	
Flexibility and support in the ability to structure services and resources	
<b>OTHER CONSIDERATIONS</b>	

## ***Appendix D: Supportive Recovery Homes Assessment Information and Criteria Check List***

There were some families who experienced some challenges in understanding the specific requirements under the *Community Care and Assisted Living Act* and the provisions that apply to them.

In particular, some families found that there are specific health and safety measures that apply when three or more unrelated individuals are living together.

A conversation with Ministry staff responsible for the administration of the Act noted that the Ministry of Social Development had created some tools and resources to help provide guidance around the specific requirements as it related to provisions around establishing supportive recovery homes. It was suggested that perhaps these tools and resources could be adapted to support families in the community living sector.

A sample of the tools and resources that were provided are included in this section as a sample of the type of information that is available and the types of steps or actions that may be needed to ensure compliance with the Act.

## Supportive Recovery Homes Assessment Information and Criteria Check List

### Overview

The Ministry of Housing and Social Development (MHSD) requires a proposal from unlicensed Supportive Recovery Homes (SRH) under the Community Care and Assisted Living Act when per diem funding is requested from the ministry. In order to be considered for per diem funding, the SRH operator must provide a written request outlining how his/her facility meets the assessment guidelines. SRH operators should also provide the necessary documentation to verify or support their statements. The approval process will follow the principles of administrative fairness with a priority on safety and benefit to the clients. The following criteria will be used as a guideline by the MHSD to assess the SRH's eligibility for ministry authorized per diems.

### Assessment Process:

- MHSD Regional Office coordinates the SRH review process; SRH submits a proposal and information to meet the assessment criteria;
- Regional Manager coordinates the assessment process which includes a review of the SRH's proposal, arranging the Health and Safety assessment and facility/property inspection, and forwarding the recommendation for funding;
- An assessment of each SRH proposal is completed and recorded on the Assessment Template. The final decision to fund per diems will be made by the Assistants Deputy Minister of the Regional Services Division and Management Services Division respectively;
- The outcome of the decision will be mailed to the Regional Manager to forward to the SRH applicant. Each region will include instructions on billing processes and contact protocols;
- If the SRH disagrees with the recommendation, the applicant may approach the regional office for a feedback or a review of his/her case;
- Once the SRH application is approved, a letter of agreement will be signed between the MHSD and the SRH provider;
- Approved SRH providers will be required to submit biannual reports on the number of clients served and whether the client has followed their personal plan while continuing to reside in the facility; and
- MHSD Executive Directors will work with providers to resolve complaints at the regional level and terminate per diems, if justified, on a case by case basis.

## Assessment Criteria:

### FACILITY

- Description of facility, including address and contact person, number of residents, number of beds and number of staff;
- Number of per diems requested (available only for income assistance clients);
- Evidence of quality and safety of the service (i.e., license/registration number, inspection report, letters of reference, client outcome information and reputation);
- Set of "house policies" (e.g., curfews, overnight guests, capacity, critical incidence, fire inspection, etc.);
- General quality/standard of the physical environment (i.e., no known safety issues and house plans indicate enough space for the number of residents);
- Safe, secure and sanitary environment (e.g., residents are safely accommodated given the facility's design and hospitality services and personal assistance services do not jeopardize health and safety of client);
- Facility and property is inspected by BC Housing and meets standards; and
- Facility meets all/any municipal licensing and/or zoning requirements of municipality in which it operates.

### PROGRAM

- General description of the proposed recovery program (personal service plan, duration and outcomes, group meetings, other activities, staff qualifications, etc.);
- Sufficient number of staff with knowledge and ability to perform assigned tasks and activities;
- Sources of funding (i.e., Health Authority, BC Housing, Federal Government and charities);
- Facility provides meals (Canada Food Guide)
- Complaints resolution process; and
- Evidence of positive reputation within the community (e.g., letters of support).

### Note:

- SRHs are required to submit information to meet the assessment criteria;
- Determination of funding need will be assessed by the MHSD; and
- Preference will be given to non-profit organizations with plans to expand bed capacity.
- The cost of a BC Housing facility and property inspection is \$575 per dwelling. Owner/operator will be responsible for the cost of this inspection.
- In the future, registration with the Office of the Assisted Living Registrar (OALR) will be part of the criteria. The OALR is developing relevant health and safety standards and once these standards are in place, adopting registration will assure consistency across the province.

## ***Appendix E: Models and Approaches Adopted In Other Jurisdictions***

In addition to looking at some of the models that have been developed in the BC context, this section provides a brief overview of strategies and approaches that have been adopted in other jurisdictions. This includes research from Australia, the UK, and the U.S. including specific policies addressing individualized and self-directed funding, and those involving payment of family members as caregivers.

### **Self-Directed Support (Australia)**

The Australian government conducted an extensive review of their system of disability care and support with the report from the *Australian Government's Productivity Commission*, released in July 2011, examining a range of potential policy choices for enhancing the quality of life for people with disabilities including strategies which, if adopted, could help lead to improvements in the opportunities for the economic and social inclusion of people with disabilities and their caregivers.

The Australian review focused on different ways to deliver existing services and supports to people with disabilities in a way that allowed individuals with disabilities to have a greater sense of control and choice over how their services were delivered. The study included a review of different approaches that have been adopted within the Australian context as well as strategies and approaches adopted in other jurisdictions. As part of the review, the Australian government also looked at the literature around potential impacts/outcomes associated with self-directed arrangements.

In looking at the different approaches that were adopted within the Australian context, it was noted that there can be a significant degree of variation in the approaches and definitions associated with the concept of self-directed care. These range from a broad definition which included the ability to choose between service providers to different types of arrangements that allowed for greater choice in service levels and priorities within a specific budget allocation.

Within the Australian context, it was noted that Western Australia has one of the most well-developed and long-standing systems of individualized care whereby most funding allocated to a person with disabilities is portable, thereby allowing the individual and their family to work toward a reasonable degree of customization in the services that are provided.

In managing the different support arrangements, it was noted that a legal entity or intermediary is typically established to help the individual and that in all but very rare cases family members would not be allowed to play this role.

Micro-agencies or micro-boards were one of the models that were used to help coordinate services and care and to ensure that the lines of accountability and fiduciary responsibility are clear. While the individualized approach appears to be gaining popularity within Australia, the research also suggests that there is still a significant degree of experimentation across different jurisdictions with some states like South Australia and New South Wales only starting to embark upon this path.

In addition to exploring the use of individualized funding, the Australian Productivity Commission examined different ways to strengthen and enhance the types of services that are available, and to understand more fully the potential gaps in the delivery of services and supports. Through their survey of services users and care givers, the Australian Productivity Commission noted that:

- 24% of all services users and 25% of all care givers who were surveyed reported that they would like to have more choice and more services;
- 19% of all services users and 20% of all care givers who were surveyed reported that they would like to have more funding;
- 8% of all services users and 23% of all care givers who were surveyed reported that they would like to have more communication or information sharing.

### **Lower Operating Cost Profile**

The Australian report also looked at some of the cost implications related to the different self-directed funding models and noted that, in many cases, the self-directed models had a lower operating cost profile when compared to other models with the research suggesting that this approach also resulted in improved client outcomes.

### **Client Related Outcomes (UK)**

The Australian Productivity Commission also included an examination of some of the individual impacts and outcomes associated with self-directed funding. This included a review of research undertaken in other jurisdictions. Based on the findings reported in the Australian Productivity Commission, there has been a significant level of research conducted in the UK around potential impacts of *choice-based or individualized funding models*.

## U.K. Based Research

While there are some limitations around the sample size in some of these studies, the results are largely encouraging. In one of the studies, it was noted that the shift toward self-directed funding resulted in significant improvements in the overall sense of satisfaction expressed by the individual consumer. In particular, a UK study (2006) reported that among the sample of individuals surveyed “no one was really happy with the level of control over their life before the self-directed funding was introduced”. At the same time, more than 50% of the study participants reported a higher degree of happiness with the level of control over their life after they moved to more individualized or self-directed funding.

The same study also found that only a small percentage of study participants were “really happy” with their overall support services before having the option to move toward more self-directed funding. At the same time, 60% reported a very high level of satisfaction with their overall support services after they had moved to more individualized or self-directed funding arrangements.

Researchers in the UK also found that there was a significant shift in the number of individuals reporting higher levels of satisfaction with their situation after they had moved out of residential care into other types of housing arrangements. As well, the study found that the number of “co-tenants” fell by approximately 50% with a larger number of individuals reporting they were “really happy” with their relationships following their move. This is an important outcome with only 25% of residents reporting that they were “really happy” with their relationships prior to their move compared to 67% who reported a high degree of happiness following their move.

In looking at some of the general operating principles underpinning the move toward self-directed funding, the Australian Commission also reported the following types of individual outcomes typically arising out of a change in the structure of the family model to include more individualized or self-directed funding:

- General health and well-being (51% reported an improvement)
- Ability to spend time with people you like (58% reported an improvement)
- Overall quality of life (69% reported an improvement)
- Ability to be part of the community (58% reported an improvement)
- Sense of choice and control (67% reported an improvement)
- Sense of safety and security (40% reported an improvement)



### **Current Reforms Being Considered in the UK**

On March 19, 2013, the UK government launched a Joint Committee Review on social care reform within the UK. The review has been structured to focus on ways to achieve better, more cost effective solutions within the existing system of services and supports including consideration of ways to structure existing services and supports to better fit peoples' lives. The DRAFT Care and Support Bill was released on March 19, 2013 and is currently before the Joint Committee for consideration.

## Appendix F

### *Monthly Housing Costs in BC Communities*

The following table includes information on monthly housing costs for British Columbians across BC communities based on information from the 2011 National Household Survey as well as rental market information based on communities that are included in CMHC's *Rental Market Report*.

The information in Table 1 includes median monthly payments (taxes, utilities, and mortgage and interest payments) across owners as well as information on monthly housing costs for renters. Where possible, this report also includes updated rental market information for bachelor and 1-bedroom units reported in CMHC's most recent *Rental Market Report* (December 2013).

In looking at the information reported in this section, it is important to note that the information reflected in the Rental Market Report published by CMHC includes only the purpose-built rental housing stock where there are 3 or more rental units (apartment buildings). This stock accounts for less than 50 per cent of all rental housing units in Vancouver and Victoria with secondary suites, rented houses, and rented condo units representing a larger percentage of the stock. There are also rooming houses as well as single room occupancy hotel units which are rented monthly and which are not reflected in these totals.

The non-conventional rental stock includes those that are part of the secondary rental market and include rented singled detached homeless, garden and basement suites as well as rented condo stock. This housing is more likely to be more affordable when compared to the conventional rental housing stock. This housing is reflected in the more comprehensive survey of housing costs reported by Statistics Canada through the Census and, for 2011, through the National Household Survey. The information reported by Statistics Canada includes average and median rental housing costs (including utilities) and are typically lower than the average market rents reported by CMHC based on household size and type.

### Monthly Housing Costs –Ownership and Rental

Municipality	2011 Median Monthly Payments Owners	2011 Median Monthly Payments Renters	CMHC Average Market Rent Bachelor (\$)	CMHC Average Market Rent 1 BDR (\$)	CMHC Average Market Rent (\$) (all categories)
<b>Province</b>	<b>\$1,023</b>	<b>\$903</b>	<b>\$810</b>	<b>\$926</b>	<b>\$972</b>
<b>East Kootenay</b>	\$ 844	\$750			
Elkford	\$793	\$872			
Sparwood	\$ 499	\$743			
Fernie	\$1,179	\$735	\$454	\$616	\$690
Cranbrook	\$940	\$744			
Kimberly	\$792	\$751			
<b>Central Kootenay</b>	\$548	\$741			
Creston	\$493	\$756			
Nelson	\$717	\$801	\$527	\$657	\$708
Kaslo	\$348	\$484			
New Denver	\$1,000	\$574			
Castlegar	\$866	\$632			
Nakusp	\$521	\$631			
<b>Kootenay Boundary</b>	\$524	\$661			
Fruitvale	\$558	\$528			
Montrose	\$452	0			
Trail	\$576	\$608			
Warfield	\$652	\$654			
Rosland	\$754	\$701			
Grand Forks	\$570	\$720			
Midway	\$456	\$683			
<b>Okanagan-Similkameen</b>	<b>\$583</b>	<b>\$825</b>			
Osoyoos	\$484	\$776			
Princeton	\$418	\$552			
Summerland	\$541	\$907			
Penticton	\$738	\$826	\$539	\$676	\$719
<b>Fraser Valley</b>	\$1156	\$796			
Hope	\$485	\$701			
Chilliwack	\$1,064	\$800	\$505	\$628	\$690
Harrison Hot Springs	\$966	\$832			
Kent	\$838	\$650			
Abbotsford	\$1,204	\$801	\$575	\$676	\$746
Mission	\$1,453	\$751	\$575	\$676	\$746
<b>Greater Vancouver</b>	\$1,246	\$968	\$876	\$1,005	\$1,067
Langley District	\$1,381	\$1,001	\$638	\$792	\$868
Langley City	\$1,162	\$853	\$638	\$792	\$868
Surrey	\$1,391	\$794	\$632	\$751	\$846

Municipality	2011 Median Monthly Payments Owners	2011 Median Monthly Payments Renters	CMHC Average Market Rent Bachelor (\$)	CMHC Average Market Rent 1 BDR (\$)	CMHC Average Market Rent (\$) (all categories)
White Rock	\$850	\$891	\$735	\$837	\$884
Delta	\$1,196	\$864	\$641	\$797	\$892
Richmond	\$1,047	\$1,101	\$796	\$953	\$1,060
UBC/UEL	\$1,293	\$1,226	\$944	\$1,347	\$1,633
Vancouver	\$1,119	\$1,004	\$917	\$1,090	\$1,144
Burnaby	\$1,030	\$966	\$768	\$900	\$971
New Westminster	\$1,338	\$830	\$684	\$818	\$884
Coquitlam	\$1,310	\$949	\$702	\$807	\$887
Belcarra	\$1,306	\$687	--	--	--
Anmore	\$1,949	\$1,604	--	--	--
Port Coquitlam	\$1,426	\$913	\$702	\$807	\$887
Port Moody	\$1,529	\$1,281	\$702	\$807	\$887
North Vancouver DM	\$1,195	\$1,203	\$908	\$1,068	\$1,190
North Vancouver City	\$1,209	\$1,017	\$848	\$1,005	\$1,067
West Vancouver	\$988	\$1,284	\$977	\$1,281	\$1,511
Lions Bay	\$1,446	\$773	--	--	--
Pitt Meadows	\$1,411	\$922	\$636	\$708	\$787
Maple Ridge	\$1,500	\$868	\$636	\$708	\$787
Capital	\$1,017	\$901	\$695	\$828	\$891
North Saanich	\$709	\$848	no data	no data	no data
Sidney	\$750	\$1,081	no data	\$799	\$1,011
Central Saanich	\$956	\$921	\$677	\$833	\$928
Saanich	\$935	\$948	\$677	\$833	\$928
Oak Bay	\$771	\$906	\$713	\$827	\$960
Victoria	\$1,025	\$865	\$700	\$839	\$888
Esquimalt	\$1,132	\$874	\$643	\$755	\$820
View Royal	\$1,215	\$1,003	\$642	\$789	\$931
Colwood	\$1,343	\$1,002	\$642	\$789	\$931
Langford	\$1,516	\$1,097	\$642	\$789	\$931
View Royal	\$1,215	\$1,003	no data	no data	no data
Highlands	\$1,508	\$1,057	\$642	\$789	\$931
Sooke	\$1,393	\$950	no data	no data	no data
Metchosin	\$980	\$949			
Nanaimo	\$751	\$850	\$565	\$686	\$741
Nanaimo City	\$948	\$849			
Lantzville	\$826	\$1,003			
Parksville	\$684	\$804	\$540	\$708	\$736
Qualicum Beach	\$467	\$1,012			
Alberni-Clayquot	\$519	\$701			
Port Alberni	\$539	\$660			

Municipality	2011 Median Monthly Payments Owners	2011 Median Monthly Payments Renters	CMHC Average Market Rent Bachelor (\$)	CMHC Average Market Rent 1 BDR (\$)	CMHC Average Market Rent (\$) (all categories)
Strathcona	\$731	\$791			
Zeballos	\$865	\$0			
Campbell River	\$841	\$790			
Sayward	\$333	\$1,001			

Comox Valley	\$690	\$831			
Comox	\$707	\$864			
Courtney	\$736	\$810			
Cumberland	\$1,189	\$982			

Cowichan Valley	\$833	\$778			
North Cowichan	\$791	\$730			
Duncan	\$460	\$794	\$524	\$637	\$736
Lake Cowichan	\$682	\$672			
Ladysmith	\$835	\$853			
Sayward VL	\$0	\$1,040			

Powell River	\$893	\$1,017	no data	\$589	\$634
Powell River	\$573	\$662			

Sunshine Coast	\$650	\$949			
Gibsons T	\$869	\$916			
Sechelt DM	\$604	\$1,032			

Squamish-Lillooet	\$1,492	\$1,097			
Squamish	\$1,584	\$974	\$591	\$717	\$775
Whistler	\$1,492	\$1,298			
Lillooet	\$471	\$609			

Thompson-Nicola	\$882	\$801			
Merritt	\$913	\$701			
Ashcroft	\$361	\$615			
Cache Creek	\$379	\$544			
Logan Lake	\$409	\$610			
Kamloops	\$1,052	\$833	\$641	\$721	\$775
Sun Peaks Mountain	\$1,342	\$1,053			
Chase	\$521	\$501			
Clearwater	\$784	\$694			

Central Okanagan	\$1,070	\$1,002			
Kelowna	\$1,064	\$1,001	\$606	\$778	\$885
Lake Country	\$1,238	\$1,038			
Peachland	\$858	\$767			

Municipality	2011 Median Monthly Payments Owners	2011 Median Monthly Payments Renters	CMHC Average Market Rent Bachelor (\$)	CMHC Average Market Rent 1 BDR (\$)	CMHC Average Market Rent (\$) (all categories)
North Okanagan	\$796	\$830			
Coldstream	\$936	\$1,005			
Vernon	\$831	\$828	\$531	\$645	\$715
Armstrong	\$803	\$870			
Enderby	\$679	\$709			
Columbia-Shuswap	\$649	\$748			
Revelstoke	\$898	\$751			
Salmon Arm	\$653	\$765			
Cariboo	\$565	\$666			
Williams Lake	\$630	\$693	\$-	\$594	\$670
Quesnel	\$556	\$637	\$442	\$534	\$590
Wells	\$380	\$669			
Mount Waddington	\$759	\$625			
Alert Bay	\$571	\$539			
Port McNeill	\$1,067	\$667			
Port Hardy	\$859	\$626			
Skeena-Queen Charlotte	\$829	\$662			
Prince Rupert	\$953	\$662	\$471	\$591	\$653
Kitimat-Stikine	\$792	\$1,009			
Kitimat	\$608	\$600			
Terrace	\$683	\$700	\$521	\$595	\$666
Hazelton	\$1,162	\$748			
New Hazelton	\$865	\$656			
Bulkley-Nechako	\$676	\$627			
Vanderhoof	\$759	\$649			
Fraser Lake	\$389	\$682			
Fort St. James	\$803	\$689			
Burns Lake	\$884	\$603			
Granisle	\$395	0			
Houston	\$880	\$621			
Telkwa	\$1,079	\$982			
Smithers	\$848	\$623			
Fraser-Fort George	\$933	\$745			
Valemount VL	\$673	\$673			
McBride VL	\$505	\$605			
Prince George CY	\$986	\$749	\$553	\$634	\$711
Mackenzie DM	\$765	\$701			

Municipality	2011 Median Monthly Payments Owners	2011 Median Monthly Payments Renters	CMHC Average Market Rent Bachelor (\$)	CMHC Average Market Rent 1 BDR (\$)	CMHC Average Market Rent (\$) (all categories)
Peace River	\$1,145	\$903			
Tumbler Ridge	\$1,069	\$1,002			
Chetwynd	\$1,009	\$785			
Dawson Creek	\$1,015	\$849	\$697	\$799	\$926
Hudson's Hope	\$342	\$801			
Taylor	\$1,136	\$887			
Fort St. John	\$1,344	\$936	\$655	\$796	\$940

Stikine	\$389	\$684			
Stikine	\$389	\$684			

Northern Rockies	\$1,153	\$851			
Northern Rockies	\$1,153	\$851			

Source: Statistics Canada, 2011 National Household Survey and CMHC Rental Market Report (December 2013)

## Appendix G

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