RESEARCH REPORT

External Research Program

Neighbourhood Group Homes for the Elderly: The Planning, Design and Development Process

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NEIGHBOURHOOD GROUP HOMES FOR THE ELDERLY: THE PLANNING, DESIGN AND DEVELOPMENT PROCESS

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PREFACE

This research project was undertaken at a time when the number of Abbeyfield houses in Canada had reached a significant enough number to warrant a first review and comparison. The interest in the model was growing rapidly, and it was felt by the author that the time was right to consolidate the experience gained by those who had put the earlier projects together, and to pass this information along to all those embarking on new projects. Since this project was begun in 1995, activity has escalated, and much interest has been expressed in the information contained herein.

The research was conducted during 1995 and early 1996, involving case studies of a sample of projects across Canada. For the purposes of comparison and general interest, several projects were included in the study which were not Abbeyfield Houses, but, in the opinion of the author, fell within the definition of the general housing model, and therefore promised valuable lessons.

ACKNOWLEDGMENTS

The author would like to thank, first and foremost, the numerous people who contributed their time and valuable experience in interviews, completed surveys and hosted tours of projects, including sponsor members, project owners, municipal and provincial staff, professional consultants, and other volunteers. Without their warm, generous and open communication, this study would not have been possible. A special thanks goes to the administration of the Abbeyfield Houses of Canada Society head office and regional chapters. It was my objective at the outset to pool this large group's body of knowledge and experience for the benefit of those involved in future small-group supportive housing projects for the elderly. This objective was immediately recognized and embraced by those who contributed their expertise to the content of this report.

Thanks as well to members of the Advisory Committee who generously contributed their expertise and unique perspectives to the research methodology, critique the research instruments, and offer their comments on the final analysis and report. These individuals were: John Jessop, Charlotte Murray, MAIBC, Charles Cooper, Keith Benjamin, MAIBC and Richard Balfour, MAIBC.

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Finally, sincere thanks go to Canada Mortgage and Housing Corporation for their financial support of this project, and to Luis Rodriguez from the Research Division, who managed the project.

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EXECUTIVE SUMMARY

Summary of the Research Project

Population aging, and the increasing number of older persons, requires the identification of alternatives to traditional institutional care of frail elderly and disabled persons. The housing needs of a significant segment of the elderly population fall between the extremes of private, independent housing and nursing homes. As the old elderly, frail but healthy, independent but alone, make up larger proportions of the local population there will be a growing demand for supportive living options.

> *"Supportive housing units are defined by their small scale (7-10 persons); homelike social context; shared spaces for dining, entertaining and group activities. Private quarters may range from a bed-sitting room, toilet, basin and small kitchenette to an entire self-contained suite. There is a resident 'house person' to oversee meal preparation and general operations. Ordinarily, community organizations such as societies, service clubs or churches provide continuity, legal responsibility, administrative support or volunteer help to ensure that operations are self-sustaining and non-profit."(Murray, 1988)*

This study focuses on sheltered housing projects, to the extent that they are limited to small numbers of units. The goal of this project was to produce a guidebook appropriate to the Canadian context which analyses and documents the planning, financing, site selection, design, development, start-up and marketing process of a sample of Canadian Abbeyfield Houses, and other small-group housing for the elderly. Case histories were collected with respect to the context and circumstances of their development, the key players in this process and their roles. Comparison and critical analysis of these projects' development experience provides insight into the process of implementing this residential option. The specific problems experienced and their respective solutions are highlighted. The potential contribution of this report to the housing industry is in *facilitating easier and faster development* of supportive group homes in existing neighbourhoods.

Growing acceptance of this model in Canada is reflected in the recent growth of Abbeyfield houses, particularly in B.C. where thirteen have been developed between 1987 and 1995, and several more are under construction or in the planning stage. It is important to note that much of the initiative to date has been on the part of volunteers and non-profit societies with only limited funding from government in the late 1980's. This report may facilitate acceptance by all levels of government by drawing attention to the effectiveness, flexibility and popularity of this housing model. Familiarity with the experience of the small group model on the part of various officials may lead to changes in policies, rules and regulations, codes and by-laws. Group home developers must also deal with neighbourhood opposition and the negative attitudes, misinformation and prejudices of local residents, often called the NIMBY (Not In My Back Yard) syndrome. The results of the study will also assist

seniors' groups in lobbying for changes to municipal land-use policies and procedures.

The project selection criteria included: geographical location, type of sponsor, new versus retrofitted buildings, size of community, funding sources, age of house (i.e. historically), form of tenure, sponsor maturity, stage of development completion and socio-economic status of target residents. Eighteen out of the total of 22 case study projects were visited in person, toured and photographed. In addition, architectural drawings describing the projects were obtained in most, but not all cases. Using semi-structured interviews with key informants, data was elicited that enabled the construction of a timeline of events, a list of critical decisions made, problems encountered and their solutions. Self-administered questionnaires were completed in the cases where travel by the researcher to the project location was not possible. The data collected were placed into a matrix which enabled identification of similarities and differences between participating projects. Additional tables were created to summarize, compare and analyze financial data for both development costs and operations. The patterns, or lack thereof, revealed by the matrix analysis allowed the development of a typology based on commonalities across a range of interconnected variables. See **Outline of Methodology**, page 9, and Appendix B for a full discussion.

Description of the Case Studies

The sponsors of all but two of the 22 case studies included in the study are non-profit, fifteen of which are affiliated with the Abbeyfield Houses Society of Canada. Other types included: a resident-organized equity cooperative, a private sector development and a provincially sponsored, private owner-operated licensed sheltered care facility. For non-profit groups, significant sources of skilled and committed human resources from which to draw and replenish volunteers include religious organizations, service clubs, and municipal housing departments. In addition, each project seems to depend upon one or two key individuals who have either initiated interest in the project, or recognized its value and carried it forward.

Nine case studies were developed under structured provincial government funding programs. By contrast to many earlier projects and the Quebec case studies, the majority of the projects surveyed had or have some kind of private financing. Fundraising strategies varied, the success of which depended to a large degree on the support of the local community, and on timing.

Summary of Case Study Experience

- The difference between the main or development committee and the house operating committee was quite marked. The skills and experience they brought were again quite different, the latter focusing on household management, interior decorating, care-giving and "people skills." The former, on the other hand, required specific development skills, including financing, marketing, real estate, design and construction. There is a fundamentally different commitment of time and energy required by the house committee as opposed to the development committee. Quite often, the volunteers who have the skills and interest to carry out the development process, are not able or interested in staying with the project after it opens. Residents themselves rarely played a significant role in decision-making, though this may have more to do with management philosophy than with residents' ability.

- Needs assessment surveys were conducted in eleven cases. In all of these, more than adequate need was demonstrated in terms of the large proportions of the local populations that were elderly and in need of supportive housing options. Size of community did not have any apparent influence on the feasibility of case study projects. Development consultants were formally retained in only 2 of the 22 case studies. In two additional case studies, development advice and assistance was formally provided through federal and provincial funding programs. Most non-profit sponsors, however, managed with the skills of board members, and some assistance from their architects.

- There were four general sets of circumstances surrounding the selection and/or the acquisition of property for the development of the case study projects: sites were either purchased, leased , already owned or donated to the sponsor. A number of important site criteria included: proximity to shops and amenities; access to transportation; a flat, accessible site, in a good, stable, identifiable residential neighbourhood or community. The dilemma between finding good locations and finding affordable, vacant property has, in part, led to the important role that churches, and to a lesser extent municipalities, have played in making sites available to non-profit housing societies. As well, the study has yielded some interesting perspectives on the re-utilization of existing building stock and rehabilitation of older neighbourhoods.

- Architectural consultants were retained in all but two case study projects. While provincial architectural associations provide literature to assist groups in making this decision, most appear to be more comfortable making this choice based on personal knowledge or trusted referrals. Architectural consultants, however, rarely had specific knowledge of the Abbeyfield or supportive group home housing model. Despite visiting and reviewing built precedents, the tendency was for both owners and architects to attribute very little, beyond a basic understanding of the concept, to these examples. To a large extent, each design solution was a response to the individual circumstances, whether site and context, budget or local architectural style.

- The range of types of attitudes and planning mechanisms at the municipal level, allowing these small group homes for seniors to be developed, varied greatly between one locality and another. In six case studies, staff at the municipalities took a pro-active approach to supporting the projects. While half of the case studies required no rezoning or development approval, the other half did have to or chose to rezone land in order to develop their group home projects. Only five case studies had any real difficulty, however, with the rezoning or development approvals process. With regard to acceptance by the neighbourhood, relatively little community opposition was faced overall. Clearly, most problems occur when neighbours receive inadequate or inaccurate information about the proposed project, and disappear after their questions and concerns are addressed.

- The complexity of building code requirements do not easily lend themselves to accommodate new or unfamiliar building types. When faced with difficult questions for interpretation, users of the code -- architects, plan-checkers and municipal building inspectors -- tend toward conservative solutions. The issue of supporting frail residents as their health declines and mobility decreases is a growing concern. It is important that sponsors and operators have a clear understanding of their goals and mandate with regard to their clients. Many groups avoid the more stringent and costly building code requirements for licensed care homes, and later find themselves unable to adapt to the changing needs of their residents. Although there is always room for interpretation in matters of building code, the range of interpretations was relatively narrow.

- Aside from unexpected and unavoidable delays, few projects had any difficulties with their chosen contractors. It is suggested that sponsors should obtain competitive bids, but to be realistic about the costs of construction. In general, the level of satisfaction with the construction process was highest among those groups who hired a project manager, or had the expertise to manage the project themselves. The level of satisfaction was consistently high, as well, among those who had invited a selected few contractors to bid on the project. For non-profit societies with little or no construction or development experience, recruiting a board member with the necessary skills and knowledge early in the process is perhaps the best insurance that informed decisions will be made at every step.

- In terms of staffing and operations, the earliest projects helped to develop guidelines for Canadian Abbeyfield houses which have been widely used, and helped to take the uncertainty out of this stage for subsequent projects. Some of the criteria mentioned most often for the housekeeper's role included: familiarity or sensitivity in working with the elderly, domestic skills, the "right" personality and to a much lesser degree, experience with long term care or nursing. The descriptions give some indication of the complexity and responsibility that this position entails. The housekeeper's character often establishes the personality of the house itself.

- It was observed that waiting lists were of very little use with this resident population. The frail elderly that have expressed or acknowledged a need for a more supportive living environment, need such support immediately. The elderly that are "not ready yet" often see no reason to compromise their privacy and independence, or to leave their familiar private home. Selection criteria expressed by the sponsors responsible for selecting residents include: independent mobility or ambulation (ability to walk), continence (bladder and bowel control), and often, whether it is stated or not, compatibility with others in the group. There is a tendency for residents to be admitted older and frailer than was historically the case in UK Abbeyfield houses. Seniors now are less likely to accept support in a shared setting unless they are unable to live alone. Many groups have turned to recruiting potential residents through referrals from a variety of agencies in the community. Abbeyfield houses, and other supportive group homes for seniors should be seen in the context of the housing and care continuum, and those responsible for them should be clear about what services they provide within this larger framework. Establishing a philosophy or mission can help organizing sponsors focus and establish clear operating policies.

- Most project sponsors determined a project budget based on a monthly rental rate (or unit price) that they felt their particular market would bear, determining the amount of capital required to meet the development costs. The room and board rates vary from a low of $690 to a high of $1350, with many projects setting their rates in the $1100-1200 range, for similar accommodation and almost identical supportive services. With a few exceptions, the figures for staff salaries and benefits are very comparable, ranging from $2263 to $2941 per month.

Summary of Recommended Development Process Steps

- Form society or company with intent to develop small group home project for seniors; articulate clear goals and common mission statement
- Recruit members and hire staff and consultants with specific expertise in several areas, including both development and operations
- Conduct both needs assessment and feasibility analysis; establish referral network amongst local service and seniors organizations, physicians, places of worship and hospitals
- Initiate contact with municipal planners and elected officials, provide information about your intent, local need and project feasibility, and request support and assistance
- Simultaneously strategize and operationalize financing; conduct land/site/building search using clearly articulated locational criteria; research and if possible visit project precedents/examples
- Select and acquire site; initiate project design; inform and consult with neighbours and with municipal authorities
- Apply for rezoning of land (if required) or development approval (if required)
- Do detailed cost check and confirm project is on budget; complete design and construction drawings and specifications
- Apply for building permit (if required)
- Build the project (try to time everything so the weather is good); meanwhile, design operations and maintenance procedures and print manual, including staff requirements; advertise, interview and hire staff, and, when occupancy date is quite firm, advertise and select residents

- Acquire furnishings and decorate completed building, having planned during construction
- Stage staff orientation, household set-up and resident move-in to allow time for acclimatization
- Host official opening tea party, remembering to invite all the neighbours who supported the project, and even those who didn't (it's never too late to make trouble!)

Summary of Advantages and Obstacles

From among the multitude of variables that affected the planning, design and development processes of the 22 small-group case studies researched for this study, eight issues stand out as the most critical for success (refer to **Advantages and Obstacles**, page 62 for a full discussion.) These include:

1. Manpower - skilled, focused, energetic
2. Development know-how - have it or get it
3. Neighbourhood - involvement & support
4. Financing - connections
5. Real Estate- available and appropriate
6. Marketing - know your clients
7. Clear mission - articulate goals and philosophy
8. Research precedents - know your product

The following experiences were extraordinarily challenging, or represented the catalyst or strategy for the project's particular solution to this process. The following points summarize these findings:

- Seven projects noted difficulties with the development *process* itself, although the majority of these involved government bureaucracy, at either the provincial or municipal level. On the other hand, several case studies developed under a provincial housing program were greatly facilitated by the network of supporters, coordinators and resources made available through these programs. The differences between programs available in different provinces was marked. For some projects, the rezoning application process, and additional permit requirements at the municipal level were the greatest obstacles to overcome. Several project sponsors, however, noted that representatives of the municipal government or staff had been particularly supportive, helpful or even instrumental in their development process.

- Sponsors of six of the case study projects had some difficulties convincing residents of the neighbourhood to support their group home projects. In the majority of these cases, the groups developing the project were, to some extent, "outsiders"; in other words, they lacked a local, grass-roots connection to the particular neighbourhood where they were proposing project development. It was universally the case that neighbours' opposition was due to a lack of information, understanding and/or involvement on the part of the local community.

- Eight projects experienced some difficulty with relationships between individuals involved in the project. For example, a lack of coherence within the group, leading to internal criticism, can demoralize members and lead to unnecessary turn-over of group members. As well, many difficulties with consultants resulted from a lack of appropriate experience with the process leading to unrealistic expectations.

- A few of the sponsors had considerable difficulty raising the necessary capital to develop the project. Moreover, there were some problems associated with poor management of financial resources. The final variable which was experienced as significant, was that of locating and acquiring suitable land for development. Eight case study projects had some difficulty with land. In contrast, land was made available for projects through donation or non-market lease in seven case studies. In two others, large cash donations facilitated the acquisition of suitable land with relative ease. Finding an available, appropriate and affordable piece of property, or a building suitable for conversion, is one of the biggest challenges facing groups wishing to develop a supportive group-home project. Since it must happen early on in the process, and other development decisions hinge on its particulars, it can be, and has proved a significant stumbling block for many groups.

- Two projects experienced significant difficulty with the type of tenure which they attempted to implement. A lack of precedent for condominium, cooperative or life-lease "group homes" left sponsoring groups exposed to uncertainty and the possibility of errors in judgment, as well as the burden of solving previously un-met problems, far more than those groups that developed simple rental projects.

A comparison between the positive and negative experiences of the case studies reveals a blueprint for success which can be used as a set of guidelines for groups undertaking similar projects. The case studies have been organized according to their key similarities and differences into a typology (see page 69, **Patterns and Anomalies: A Typology**) which may assist readers in applying the experiences of others to their own situation. Recommendations and guidelines for developing supportive small group homes for the elderly were developed based on both the unique circumstances and generalizable experiences of the case studies, across a variety of key variables. The report concludes with these recommendations, highlights of which are:

Summary of Recommendations

- A full discussion of **Conclusions and Recommendations** can be found on page 73.
- Sponsoring groups attempting to re-utilize heritage buildings should be aware that additional requirements may exist which could delay the process or constrain design options.
- Strong neighbourhood opposition can exist even where no rezoning is required and the project conforms to an approved use. Clearly, most problems occur when

neighbours receive inadequate or inaccurate information about the proposed project, and disappear after their questions and concerns are addressed.

- Level of satisfaction with the construction process is higher when a project manager is hired, or when sponsors have the expertise to manage the project themselves.
- Waiting lists are of very little use with this resident population, and should be kept only as a courtesy to prospective members wishing to reserve a place, though they may not be available when the house is completed.
- Sponsors should be aware of the start-up lag, during which operating costs must be covered out of other sources of revenue than rent payments or sale of shares or units. Ability to fill up a house is likely to vary tremendously depending on the local population and need and demand for this type of housing option, and other available options.
- The importance of an emergency fund or buffer cannot be overemphasized since non-profit organizations run by groups of volunteers must have mechanisms in place to deal with eventualities.
- A clear philosophy can significantly influence the operation of the house, and this is an important factor in establishing the suitability of potential staff members, who must subscribe to this philosophy in order to effectively practice it.
- It is important that sponsors and operators have a clear understanding of their goals and mandate with regard to their clients. Many groups avoid the more stringent and costly building code requirements for licensed care homes, and later find themselves unable to adapt to the changing needs of their residents. It is important to have clearly articulated policies and procedures for decision-making when the needs of a resident can no longer be met.
- The short and long term requirements of the building codes for given occupancy definitions can not be determined in isolation from the Zoning By-laws and associated permitted land uses. Even if the building itself is adaptable, proprietors must be confident that their land use zone would also permit a higher use, or the necessary rezoning could later occur.
- The potential exists for many provincial governments to play an important supportive role in assisting non-profit groups to manage the development process with advice and expertise, even if funding is no longer available to finance such projects, or to provide rental subsidies.
- Municipal governments play an important role in ensuring a timely approval process for vulnerable non-profit sponsoring groups. There is the potential for municipalities to play a much greater role, if they are aware of the housing model and can support it.
- Problems can occur due to a lacsk of skill and experience with development process on the part of sponsors. Successful projects exemplify outstanding quality, skill-level, organization and effectiveness of the group of volunteers responsible for the project. Each group needs strong leadership by one or two energetic individuals with a very clear view of the project's objectives. These individuals should seek input from others who are likewise energetic and clearly focused. Additionally, the group of individuals should be carefully selected for their specific skills and knowledge.

- A few key roles stand out as essential to the overall success of the project, and these include: the coordinator or organizer, the publicity, public-relations and fundraising person, the financier, the developer or contracting expert, and the health-care or long term care specialist, who also attends to household management and staffing issues. Additional expertise includes both legal and real estate advice, although these can be obtained externally, as can design and planning assistance.
- One additional important ingredient is the coherence and clarity of purpose of the sponsoring individuals. This is achieved through effective communication and mutual respect.
- The most important and overriding recommendation that has emerged from this study, and to which many of the other critical variables relate, has been aptly phrased: "to ensure affiliation with a supportive constituency."
- Success comes more quickly when a group's affiliation and efforts are focused on a tightly-knit local community, and that community perceives their work as contributing to the well-being of its members.
- The Abbeyfield model, and the other variations on the small, supportive living group that have emerged around the world, all aim to provide a housing alternative to the frail elderly within the context of a local neighbourhood, or community. By virtue of the small number of residents accommodated, the projects need not draw on a "market area" that is larger than this, though people from outside the area are not excluded. It is conceivable that every neighbourhood with any significant number of older people could accommodate or might require such a project. Also, because of the small size and domestic character of the projects, they are typically and most appropriately located in low-density, often single-family, neighbourhoods. These characteristics combined mean that such a project is uniquely invested in, and an integral part of this local community.

Organization of the Report

The following report begins with a general introductory chapter, including background, context and definition of the housing model. This is followed by a brief review of the literature on the topic, highlights of the policy relevance of this research, and a summary of the aims of the study. A brief outline of the methodology is included next, with a full discussion in Appendix B. The main body of the report constitutes presentation of findings organized by key analytical variables, including tables comparing the 22 case studies. These variables are divided between those important before and during development, and those afterward. The three final chapters include a discussion of advantages and obstacles encountered by the project sponsors, a typology of projects highlighting patterns and anomalies, and finally, conclusions and recommendations. This is followed immediately by a list of references and an annotated bibliography, organized by major topic headings, which provides a rich source of information for those wishing to do further research. Project profile sheets, with key facts and illustrations, can be found in Appendix A; Appendix C contains a detailed discussion of case study project selection criteria.

Résumé

Résumé du projet de recherche

Le vieillissement de la population ainsi que le nombre croissant de personnes âgées oblige à trouver des solutions de rechange à l'institutionnalisation traditionnelle des personnes âgées en perte d'autonomie et des personnes handicapées. Les besoins de logement d'un segment important de la population âgée se situent quelque part entre un logement autonome privé et un centre d'accueil. À mesure que les personnes très âgées, frêles mais en santé, autonomes mais seules, constitueront une proportion de plus en plus grande de la population locale, il y aura une demande croissante de logements supervisés.

[*Traduction*] « Les logements supervisés se définissent par leur petite échelle (de 7 à 10 personnes), un contexte de type familial, des locaux communs pour les repas, les visites et les activités de groupe. Les locaux privés couvrent toute la gamme entre une chambre-salon avec toilette, lavabo et petite cuisinette et un appartement autonome. Un responsable en résidence surveille la préparation des repas et le fonctionnement général de la maison. D'ordinaire, ce sont des organisations communautaires comme des associations, des sociétés, des clubs sociaux ou des églises qui assurent la continuité, la responsabilité juridique, le soutien administratif ou des bénévoles pour veiller à ce que le foyer soit autonome et sans but lucratif » (Mura, 1988)

L'étude porte sur des ensembles de logements supervisés, dans la mesure où ils sont limités à un petit nombre de places. Le but du projet était de produire un guide adapté au contexte canadien analysant et exposant la planification, le financement, le choix de l'emplacement, la conception, l'aménagement, le démarrage et la mise en marché d'un échantillon de maisons de type Abbeyfield et d'autres foyers collectifs pour les aînés. Nous avons préparé des études de cas portant sur le contexte et les circonstances de l'aménagement ainsi que sur les principaux acteurs de ce processus et leur rôle. La comparaison et l'analyse critique de l'expérience de l'aménagement de ces foyers permettent de mieux comprendre la mise en oeuvre de cette option d'hébergement. Nous soulignons les principaux problèmes rencontrés et les solutions apportées. Ce rapport pourrait aider le secteur de l'habitation à faciliter et à accélérer l'aménagement de foyers supervisés collectifs dans les quartiers établis.

L'acceptation croissante de ce modèle au Canada se reflète par la croissance récente des maisons de type Abbeyfield, particulièrement en Colombie-Britannique où 13 de ces maisons ont été fondées entre 1987 et 1995, tandis que plusieurs autres sont au stade de la construction ou de la planification. Il importe de souligner que l'initiative vient à ce jour surtout de bénévoles et de sociétés sans but lucratif et qu'il n'y avait que peu d'argent des gouvernements à la fin des années 80. Ce rapport pourrait faciliter l'acceptation par tous les paliers de gouvernement en attirant l'attention sur l'efficacité, la souplesse et la popularité de ce modèle de logement. Si les fonctionnaires et les élus connaissent l'expérience du modèle de petit groupe, il en résultera peut-être des modifications des lignes de conduite, de la réglementation, des codes et des règlements municipaux. Les promoteurs de foyers collectifs doivent aussi faire face à l'opposition du quartier et aux attitudes négatives, aux idées fausses et aux préjugés des résidants locaux. Les

associations d'aînés pourront aussi se servir de l'étude pour tenter de faire modifier les lignes de conduite et les méthodes des municipalités en matière d'aménagement du territoire.

Les foyers ont été choisi en fonction des critères suivants : emplacement géographique, sorte d'organisme de parrainage, immeubles neufs ou modernisés, taille de la collectivité, sources de financement, âge de la maison (historiquement), mode d'occupation, maturité de l'organisme de parrainage, stade d'aménagement et situation socio-économique des résidants ciblés. Sur les 22 foyers, 18 ont été visités et photographiés. En outre, nous avons obtenu des dessins architecturaux décrivant les lieux dans la plupart des cas, mais non dans tous. Des entrevues semi-structurées auprès d'informateurs clés ont permis de reconstituer le film des événements, la liste des décisions critiques prises, les problèmes rencontrés et les solutions adoptées. Des questionnaires auto-administrés ont été utilisés dans le cas où le chercheur ne pouvait pas se rendre sur les lieux. Les données recueillies ont été inscrites dans une grille qui a permis de repérer les ressemblances et les différences entre les foyers. D'autres tableaux ont permis de résumer, comparer et analyser des données financières relatives à la fois aux coûts d'aménagement et au fonctionnement. Les tendances, ou l'absence de tendances, décelées par l'analyse de la grille ont permis d'établir une typologie fondée sur les éléments communs d'un éventail de variables interreliées. Pour de plus amples renseignements, voir l'exposé de la méthodologie à la page 9 et l'annexe B.

Description des études de cas

Sur les 22 études de cas, 20 des organismes de parrainage sont des organismes sans but lucratif, dont 15 sont affiliés à l'*Abbeyfield Houses Society of Canada*. Les autres comprennent une coopérative avec mise de fonds organisée par les résidants, un foyer du secteur privé et un établissement privé de soins protégés détenant une licence provinciale. Les organismes sans but lucratif peuvent se tourner vers des organisations religieuses, des clubs sociaux et des services municipaux de logement afin de trouver des ressources humaines compétentes et dévouées où recruter des bénévoles. En outre, chaque foyer semble dépendre d'une ou deux personnes clés qui ont lancé le projet ou qui en ont reconnu la valeur et sont intervenues par la suite pour le piloter.

Neuf des foyers visés par les études de cas ont été aménagés dans le cadre de programmes provinciaux structurés de financement. À la différence de beaucoup de projets antérieurs et des études de cas du Québec, la majorité des foyers bénéficient ou ont bénéficié d'un certain financement privé. Les stratégies de collecte de fonds ne sont pas uniformes et le succès dépend dans une large mesure de l'appui de la collectivité locale ainsi que du moment choisi.

Résumé des constatations des études de cas

° Il y a une différence marquée entre le comité principal ou comité d'aménagement et le comité de gestion du foyer. Leurs membres ont aussi des compétences et une expérience bien différentes -- gestion du ménage, décoration d'intérieur, soins personnels et relations humaines dans le second cas, compétences particulières en promotion immobilière (financement, commercialisation, immobilier, conception et construction) dans le second cas. Le comité de gestion exige un engagement bien différent, en termes de temps et d'énergie, de ce que requiert le comité d'aménagement. Souvent, les bénévoles qui possèdent les compétences et l'intérêt qu'exige le processus d'aménagement, ne peuvent pas ou ne veulent pas continuer de s'occuper du foyer après

l'ouverture. Quant aux résidants, ils jouent rarement un rôle important dans la prise de décisions, fait qui s'explique peut-être plus par la philosophie de gestion que par les capacités des résidants.

° Dans 11 cas, on a procédé à une enquête sur les besoins. Dans chaque cas, on a fait la preuve d'un besoin plus que suffisant, une grande proportion de la population locale étant âgée et ayant besoin de logements supervisés. La taille de la collectivité ne semble pas influencer la faisabilité des projets étudiés. On n'a retenu les services de consultants en aménagement que dans 2 cas sur 22. Deux autres cas ont bénéficié des conseils de l'aide accordés officiellement par des programmes fédéraux et provinciaux de financement. La plupart des organismes de parrainage sans but lucratif ont pu se contenter des compétences des membres du conseil et d'une certaine aide de leurs architectes.

° Il y a quatre possibilités pour le choix ou l'acquisition de la propriété où sont aménagés les foyers visés par les études de cas : elle peut être achetée, louée, donnée ou appartenir déjà à l'organisme de parrainage. Plusieurs critères régissent le choix de l'emplacement : proximité des commerces et des installations, accès au transport, un terrain plat et accessible dans un quartier ou une collectivité stable, identifiable et à caractère résidentiel. La difficulté de trouver à prix abordable une propriété inoccupée et bien située explique le rôle important joué par les églises, et dans une mesure moindre les municipalités, qui offrent des terrains aux sociétés de logement sans but lucratif. De plus, l'étude jette un éclairage intéressant sur la réutilisation d'immeubles existants et la réhabilitation des vieux quartiers.

° On a retenu les services de consultants en architecture dans tous les cas sauf deux. Même si les associations provinciales d'architecture fournissent de la documentation aux groupes pour leur aider à prendre cette décision, la plupart d'entre eux préfèrent s'adresser à quelqu'un qu'ils connaissent ou qui leur est recommandé par une personne de confiance. Il était toutefois rare que le consultant en architecture ait des connaissances précises sur les maisons Abbeyfield ou les foyers supervisés. Même s'ils avaient visité et étudié des exemples construits, les propriétaires et les architectes ne semblent guère s'en être inspirés, sauf en ce qui concerne le principe général. Dans une large mesure, chaque solution s'adapte aux circonstances: emplacement et contexte, budget ou style architectural local.

° Au palier municipal, les attitudes et les mécanismes de planification permettant l'aménagement de ces petits foyers collectifs pour les aînés varient beaucoup d'un endroit à l'autre. Dans six cas, les fonctionnaires municipaux ont proactivement appuyé les projets. Dans la moitié des cas, il n'a pas été nécessaire de modifier le zonage ou d'approuver l'aménagement; dans l'autre moitié il fallait modifier le zonage ou on a choisi de le faire. On note cependant seulement cinq cas où le zonage ou l'approbation de l'aménagement ont suscité de vraies difficultés. Au chapitre de l'acceptation par le quartier, il n'y a pas eu beaucoup d'opposition dans l'ensemble. Manifestement, la plupart des problèmes surgissent si les voisins sont insuffisamment ou incorrectement renseignés sur le projet et ils disparaissent dès que les questions et les préoccupations reçoivent réponse.

° Les exigences complexes du code du bâtiment s'accommodent mal de modèles de bâtiments nouveaux ou mal connus. En cas de difficulté d'interprétation, les utilisateurs du code -- architectes, vérificateurs de plans et inspecteurs municipaux -- optent plutôt pour la solution conservatrice. On se préoccupe de plus en plus du soutien à donner aux résidants en perte

d'autonomie. Il est important que les parrains et les exploitants aient une idée nette de leurs buts et de leur mandat à l'égard de leurs clients. Ayant choisi d'éviter les exigences rigoureuses et coûteuses du code du bâtiment applicables aux foyers accrédités, beaucoup de groupes se trouvent plus tard incapables de s'adapter à l'évolution des besoins de leurs résidants. Bien que le code du bâtiment laisse toujours une certaine place à l'interprétation, la gamme des interprétations est relativement étroite.

° Outre des retards imprévus et inévitables, on constate peu de cas de difficultés relatives aux entrepreneurs choisis. Il est recommandé que les organismes de parrainage fassent un appel d'offres, mais soient réalistes en ce qui concerne les coûts de construction. En général, la satisfaction à l'égard du processus de construction est plus élevée chez ceux qui ont engagé un directeur des travaux ou avaient la compétence pour diriger eux-mêmes les travaux. La satisfaction est aussi uniformément élevée chez ceux qui ont invité quelques entrepreneurs choisis à soumissionner. Dans le cas des sociétés sans but lucratif peu expérimentées en matière de construction ou d'aménagement, le meilleur gage que des décisions éclairées seront prises à chaque étape du processus consiste à recruter dès les premiers stades un administrateur possédant les compétences et les connaissances nécessaires.

° Sur le plan du personnel et du fonctionnement, les premiers projets ont aidé à mettre au point pour les maisons Abbeyfield canadiennes des lignes directrices qui ont été largement utilisées et ont aidé à réduire l'incertitude à ce stade pour les projets subséquents. Parmi les critères mentionnés le plus souvent pour l'aide ménagère, on retrouve : l'habitude de travailler avec des aînés ou une aptitude à le faire, les compétences domestiques, la « bonne » personnalité et, dans une mesure beaucoup moindre, l'expérience des soins prolongés ou des soins infirmiers. Ces descriptions donnent une idée de la complexité de ce poste et de la responsabilité qu'il comporte. C'est souvent le caractère de l'aide ménagère qui détermine la personnalité de la maison elle-même.

° On a pu constater que les listes d'attente ne sont guère utiles pour cette population de résidants. Les personnes âgées en perte d'autonomie qui reconnaissent ou acceptent qu'elles ont besoin d'un milieu de vie plus structuré ont besoin de ce soutien sans délai. Les personnes âgées qui « ne sont pas encore prêtes » voient rarement une raison de renoncer à leur intimité et à leur autonomie ou de quitter leur maison. Parmi les critères de sélection mentionnés par les organismes de parrainage, on note : l'autonomie de mobilité ou d'ambulation (capacité de marcher), la continence (contrôle de la vessie et des intestins) et souvent, qu'on le dise ou non, la compatibilité avec les autres membres du groupe. On tend de plus en plus à admettre des résidants plus vieux et moins autonomes que ceux qui entraient autrefois dans les maisons Abbeyfield du Royaume-Uni. Les aînés acceptent moins souvent de vivre en commun s'ils ne sont pas incapables de vivre seuls. Beaucoup de groupes en sont venus à recruter des résidants par l'entremise de diverses agences de la collectivité. Les maisons Abbeyfield, de même que les autres foyers collectifs pour les aînés, doivent être considérées dans le contexte du continu de l'hébergement et des soins et les responsables devraient préciser clairement les services qu'ils offrent par rapport à ce cadre. Le fait de définir leur philosophie ou leur mission peut aider les organisateurs à orienter et à élaborer des lignes de conduite claires.

° La plupart des organismes de parrainage fixent leur budget en fonction du loyer (ou du prix d'achat) que le marché leur semble permettre, ce qui détermine le capital nécessaire pour les coûts d'aménagement. Les taux pour la chambre et la pension s'échelonnent entre 690 $ et 1 350 $, un grand nombre de foyers se situant dans la fourchette de 1 100 $ à 1 200 $, pour un logement semblable et des services de soutien presque identiques. À quelques exceptions près, les chiffres du salaire et des avantages du personnel sont très comparables, allant de 2 263 $ à 2 941 $ par mois.

Résumé des étapes recommandées pour le processus d'aménagement

° Constituer une association ou une société dans l'intention d'aménager un petit foyer collectif pour les aînés; formuler des objectifs clairs et un énoncé de mission commun.
° Recruter des membres et engager des employés et des consultants possédant des compétences particulières dans plusieurs domaines, dont l'aménagement et les opérations.
° Procéder à la fois à l'évaluation des besoins et à une analyse de faisabilité; créer un réseau de référence parmi les organisations locales de services et les associations d'aînés, les médecins, les églises et les hôpitaux.
° Communiquer avec les fonctionnaires et les élus municipaux, donner des renseignements sur votre intention, les besoins locaux et la faisabilité du projet et demander leur aide et leur appui.
° En même temps, formuler et enclencher la stratégie de financement; procéder à la recherche d'un terrain, d'un emplacement ou d'un bâtiment, au moyen de critères bien définis concernant l'emplacement; étudier et si possible visiter des précédents ou des exemples.
° Choisir et acquérir le terrain; commencer la conception; informer et consulter les voisins et les autorités municipales.
° Demander la modification du zonage (s'il y a lieu) ou l'approbation de l'aménagement (s'il y a lieu).
° Faire une étude détaillée des coûts et confirmer que le projet respectera le budget; terminer la conception et les plans et devis.
° Demander le permis de construction (s'il y a lieu).
° Procéder aux travaux de construction (tâcher de choisir un moment où la température est bonne); entre-temps, élaborer les méthodes de fonctionnement et d'entretien et imprimer le manuel, sans oublier le personnel nécessaire; annoncer les postes, faire des entrevues et engager les employés; une fois la date d'occupation connue avec certitude, faire de la publicité et choisir les résidants.
° Acheter les mobiliers et décorer le bâtiment, la planification ayant été faite pendant les travaux de construction.
° Organiser l'orientation du personnel, la mise en place et l'emménagement des résidants, en laissant du temps pour l'acclimatation.
° Organiser un thé pour l'ouverture officielle, sans oublier d'inviter tous les voisins qui ont appuyé le projet, et même les autres (il n'est jamais trop tard pour mal faire!)

Résumé des avantages et des obstacles

Parmi le grand nombre de variables influençant la planification, la conception et l'aménagement des 22 foyers étudiés ici, il se dégage huit facteurs essentiels à la réussite (on trouvera à la page 62 un exposé détaillé des avantages et des obstacles). Ce sont les suivants :

1. La main d'oeuvre - compétente, dévouée, énergique
2. Les compétences en aménagement - si on ne les a pas, il faut aller les chercher
3. Le quartier - participation et appui
4. Le financement - contacts
5. La propriété immobilière - disponible et adaptée
6. La commercialisation - connaître vos clients
7. Une mission claire - énoncer les buts et la philosophie
8. Étudier les précédents - connaître votre produit

Les expériences suivantes représentent des défis remarquables, ou bien le catalyseur ou la stratégie dont découle la solution adoptée en l'espèce. Voici les principales constatations à cet égard :

° Dans sept cas il y a eu des difficultés liées au processus d'aménagement proprement dit, bien que le plus souvent les difficultés soient dues à la bureaucratie provinciale ou municipale. Par ailleurs, dans plusieurs cas le programme provincial de logement a grandement facilité l'aménagement en raison du réseau d'appuis, de coordonnateurs et de ressources offert par ces programmes. Les différences entre les programmes offerts par les diverses provinces sont marquées. Dans certains cas, les principaux obstacles à surmonter étaient la demande de modification du zonage et les autres permis requis. Plusieurs organismes de parrainage déclarent toutefois que les élus ou les fonctionnaires municipaux ont été particulièrement serviables ou utiles, voire indispensables.

° Six des organismes de parrainage ont éprouvé une certaine difficulté à convaincre les résidants du quartier d'appuyer leur projet de foyer collectif. Dans la majorité des cas, ils étaient dans une certaine mesure des « étrangers », c'est-à-dire qu'ils n'avaient pas de racines dans le quartier où ils se proposaient d'aménager leur foyer. Dans tous les cas, l'opposition des voisins s'explique par un manque d'information, de compréhension ou de participation de la part de la collectivité locale.

° On constate huit cas de difficultés relatives aux rapports entre les personnes travaillant au projet. Par exemple, le manque de cohésion au sein du groupe, menant à des critiques internes, peut démoraliser les membres et entraîner un roulement inutile des membres du groupe. En outre, beaucoup de difficultés relatives aux consultants découlaient des attentes irréalistes provenant d'un manque d'expérience.

° Quelques parrains ont eu beaucoup de difficulté à trouver les capitaux nécessaires. On note aussi certains problèmes relatifs à la mauvaise gestion des ressources financières. La dernière variable importante est la difficulté de trouver et d'acquérir un terrain approprié, éprouvée dans huit cas. Par ailleurs, dans sept cas le terrain a été donné ou loué à un prix inférieur au loyer du marché. Dans deux autres cas, d'importants dons en argent ont rendu relativement facile l'achat d'un terrain approprié. Trouver une propriété disponible, appropriée et abordable ou un bâtiment susceptible de conversion est un des plus grands défis que doivent relever les groupes désireux d'aménager un foyer collectif. Puisque cela doit se produire dans les premiers stades du processus et que cela conditionne d'autres décisions, beaucoup de groupes y ont vu une pierre d'achoppement.

° Deux foyers ont éprouvé des difficultés importantes relatives au mode d'occupation envisagé. L'absence de précédents concernant les foyers collectifs en copropriété, en coopérative ou en bail viager exposait les organismes de parrainage à l'incertitude et à la possibilité d'erreurs de jugement,

en plus de leur imposer de résoudre des problèmes inédits, ce qui se produisait beaucoup moins pour les organismes qui se contentaient de la simple location.

La comparaison des expériences négatives et positives relevées permet d'établir une recette de succès qui peut servir de lignes directrices pour les groupes qui entreprennent des projets semblables. Nous avons dressé une typologie des cas étudiés selon les principales ressemblances et différences (voir la page 69); le lecteur pourra s'en servir pour appliquer l'expérience d'autrui à sa propre situation. Nous avons formulé des recommandations et des lignes directrices pour l'aménagement de petits foyers supervisés collectifs pour les personnes âgées d'après les circonstances particulières et les expériences généralisables des cas étudiés selon un éventail de variables clés. Le rapport se termine par ces recommandations, dont voici les principales :

Résumé des recommandations

° Le texte complet des conclusions et recommandations se trouve à la page 73.
° Les organismes de parrainage qui veulent réutiliser des bâtiments historiques doivent savoir qu'ils pourraient être assujettis à des exigences supplémentaires susceptibles de retarder le processus ou de restreindre les options d'aménagement.
° Il peut y avoir une forte opposition du quartier même s'il n'est pas nécessaire de modifier le zonage et que le projet correspond à une utilisation approuvée. Manifestement, la plupart des problèmes surgissent lorsque les voisins reçoivent une information insuffisante ou erronée et disparaissent lorsque leurs questions et leurs préoccupations trouvent réponse.
° La satisfaction relative au processus de construction est plus forte si l'on engage un directeur des travaux ou si les parrains ont eux-mêmes les compétences nécessaires.
° Les listes d'attente ne sont guère utiles pour cette population de résidants et devraient être tenues seulement à titre de courtoisie pour les membres éventuels qui désirent réserver une place, même s'ils ne seront pas prêts à emménager à l'achèvement des travaux.
° Les parrains doivent être au courant du décalage de démarrage, au cours duquel il faut couvrir les coûts de fonctionnement à même d'autres sources de revenu que les loyers ou la vente de logements ou de parts. La possibilité de remplir toutes les places varie énormément selon la population locale ainsi que le besoin et la demande de ce choix de logement et des autres choix offerts.
° On ne saurait trop insister sur l'importance d'un fonds d'urgence ou d'un coussin, puisque les organismes sans but lucratif dirigés par des groupes de bénévoles doivent disposer de mécanismes pour faire face aux éventualités.
° Une philosophie claire peut grandement influencer le fonctionnement de la maison; ce facteur est important pour déterminer si les candidats à des postes d'employés ont les qualités nécessaires, car ils doivent adhérer à cette philosophie pour la pratiquer efficacement.
° Il est important que les organismes de parrainage et les responsables aient une idée claire de leurs buts et de leur mandat à l'égard de leurs clients. Ayant choisi d'éviter les exigences rigoureuses et coûteuses du code du bâtiment applicables aux foyers accrédités, beaucoup de groupes se trouvent plus tard incapables de s'adapter à l'évolution des besoins de leurs résidants. Il importe de disposer de directives et méthodes clairement définies lorsqu'on ne peut plus répondre aux besoins d'un résidant.
° On ne peut déterminer les exigences du code du bâtiment à court et à long terme pour chaque sorte d'occupation sans tenir compte du règlement de zonage et des utilisations permises qui y sont

associées. Même si le bâtiment lui-même est adaptable, les propriétaires doivent être convaincus que le zonage permet aussi une utilisation plus élevée, ou que la modification nécessaire du zonage sera approuvée plus tard.

° Les gouvernements provinciaux peuvent souvent jouer un rôle important pour aider les organismes sans but lucratif à gérer le processus d'aménagement par leurs conseils et leur savoir-faire, même s'il n'y a plus d'argent pour financer ces projets ou subventionner les loyers.

° Les gouvernements municipaux jouent un rôle important en veillant à la célérité du processus d'approbation pour organismes de parrainage sans but lucratif, qui sont vulnérables. Les municipalités peuvent jouer un rôle beaucoup plus important, si elles sont au courant de ce modèle de logement et peuvent l'appuyer.

° Les organismes de parrainage qui manquent de compétences et d'expérience en matière d'aménagement s'exposent à des problèmes. Les réussites sont dues à la grande qualité, aux compétences, à l'organisation et à l'efficacité du groupe de bénévoles responsable du projet. Le groupe doit bénéficier du leadership d'une ou deux personnes énergiques ayant une idée très nette des objectifs du projet. Ces personnes devraient en consulter d'autres, tout aussi énergiques et dévouées. En outre, les membres du groupe devraient être choisis avec soin en fonction de leurs compétences et de leurs connaissances.

° Quelques rôles clés sont essentiels à la réussite globale du projet, soit le coordonnateur ou organisateur, la personne chargée de la publicité, des relations publiques et de la collecte de fonds, le financier, le promoteur ou expert en construction, ainsi que le spécialiste des soins de santé ou des soins à long terme, qui s'occupe aussi des questions de gestion et de dotation en personnel du foyer. On aura aussi besoin de conseils sur l'immobilier et les questions juridiques, mais on pourra les obtenir de l'extérieur, tout comme l'aide pour la conception et la planification.

° Un autre ingrédient important est la cohérence et la clarté d'intention des parrains. On y arrive par une bonne communication et un respect réciproque.

° La recommandation générale la plus importante découlant de l'étude, et qui est liée à plusieurs autres variables critiques, est de s'affilier à un réseau de soutien.

° La réussite est plus rapide si l'affiliation et les efforts du groupe sont axés sur une collectivité locale à forte cohésion et si cette collectivité estime que son travail contribue au bien-être de ses membres.

° Le modèle Abbeyfield, ainsi que les autres variantes du petit foyer collectif qui ont vu le jour partout au monde, visent toujours à offrir une option de logement aux personnes âgées en perte d'autonomie dans le contexte du voisinage ou de la collectivité locale. Parce qu'ils ne logent qu'un petit nombre de résidants, les foyers n'ont pas besoin de viser un « marché » de plus grande envergure, même si les personnes de l'extérieur ne sont pas exclues. On pourrait concevoir que chaque quartier comptant un nombre important de personnes âgées puisse recevoir un tel foyer ou en avoir besoin. En outre, en raison de leur petite taille et de leur caractère familial, ils sont d'ordinaire situés dans des secteurs où ils sont particulièrement adaptés, soit des quartiers à faible densité, souvent de maisons individuelles. Globalement, ces caractéristiques signifient que ces foyers sont enracinés dans la collectivité locale dont ils font partie intégrante.

Plan du rapport

Le rapport qui suit s'ouvre par une introduction générale traitant de l'historique, du contexte et de la définition de ce modèle de logement. Suivent une brève revue des études antérieures sur le sujet, l'exposé des principales incidences de l'étude pour les politiques de l'État et le résumé des buts de

l'étude. Viennent ensuite les grandes lignes de la méthodologie, qui est présentée en détails à l'annexe B. Le corps du rapport présente les conclusions, selon les variables clés, avec des tableaux comparant les 22 études de cas. Nous distinguons les variables qui entrent en jeu avant et pendant l'aménagement de celles qui sont importantes par la suite. Les trois derniers chapitres traitent des avantages dont bénéficient les organismes de parrainage et des obstacles auxquels ils se heurtent, de la typologie des foyers, avec les tendances et les anomalies, et enfin des conclusions et recommandations. Viennent ensuite la liste des renvois et une bibliographie annotée, classée selon les sujets principaux, qui donne une riche source de renseignements à ceux qui désirent poursuivre la recherche. L'annexe A contient des profils des foyers, avec les principaux faits et des illustrations; on trouvera à l'annexe C une étude détaillée des critères de sélection des foyers pour les études de cas.

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The Expanding Housing Continuum

Housing for the elderly was at one time polarized between the two extremes of the housing continuum: that is - private, houses or apartments without support services, and nursing homes and chronic care institutions. This failed to accommodate the housing needs of those amongst the elderly population whose needs fall between the two extremes.

The problem is amplified by demographic shifts that have resulted in an accelerated rate of growth of the oldest segment of the older population, those over 75 years. These people tend to be more frail, have more chronic illness, to be single, and be female. More and more are living alone. It is this older segment of the population which most often falls victim to early or unnecessary institutionalization because of the lack of appropriate housing alternatives which meet their needs.

A range of supportive housing options have emerged in recent years to meet the needs of those who require some support but not institutionalization. The architectural, organizational structure and level of support are varied, but can be reduced to a few generic models. These general types include:

1. independent units within cooperatives or condominiums.
2. grouped security housing for seniors, such as the British "sheltered housing" which provides only a resident "warden" for security and management.
3. grouped service flats or bed-sitting rooms with on-site collective services and facilities.
4. semi-independent shared homes, with or without support staff.

This study focuses on the fourth, and to a certain extent the third of these four broad categories of supportive housing, to the extent that they are limited to small numbers of units. Abbeyfield Houses and other small group homes have tended to serve the needs of oldest-old, who are frail and often alone.

A Changing Population Profile

Demographers and others distinguish the young-old (64-74), from the middle old (75-84), and the old-old (85+), with increasing frailty associated with increasing age. The population aged 75+ is growing at a very rapid rate (Priest, 1994). The majority of these oldest seniors are women who are widowed, and living alone (Gutman & Wister 1994, Brink 1994, Golant 1992). Although Doyle (1994) has shown that a significant proportion of these older women live alone by choice, and prefer to maintain their independence as long as possible with support delivered to their own homes, the number of those who cannot maintain their independence is significant.

Support for Aging in Place

Population aging, and the increasing number of older persons, requires the identification of alternatives to traditional institutional care of frail elderly and disabled persons. Many countries are looking to the small neighbourhood-based supportive or sheltered group home as a cost-effective alternative to licensed care facilities (Lidmar Reinius, 1986, CMHC 1988, pp. 36-40).

As the old elderly, frail but healthy, independent but alone, make up larger proportions of the local population there will be a growing demand for options that can enable people to remain independent for as long as possible. When adequate, flexible support is provided in the community, and distributed to the elderly in their own homes, they can remain in neighbourhoods and communities where social networks and familiar community services can accommodate the process of aging. Independent lifestyles can facilitate extended physical and psychological health, and avoid or postpone the need for institutionalization.

The widespread attention in the health care sector focused on deinstitutionalization and decentralization of health care and long term care support services, generates further interest in small-scale, community-based, non-institutional long term residential and care options (Baker 1994, p.87; B.C. Royal Commission of Health Care and Costs, 1991; Ontario Ministries of Health, Community & Social Services and Citizenship, 1993 a,b; Alberta Health 1991, 1992).

Definition of the housing model

Murray (1988) offers the following definition of such accommodation: "Supportive housing units are defined by their small scale (7-10 persons); homelike social context; shared spaces for dining, entertaining and group activities. Private quarters may range from a bed-sitting room, toilet, basin and small kitchenette to an entire self-contained suite. There is a resident 'house person' to oversee meal preparation and general operations. Ordinarily, community organizations such as societies, service clubs or churches provide continuity, legal responsibility, administrative support or volunteer help to ensure that operations are self-sustaining and non-profit." (p.1 Exec. Summary.) As we will see, this definition is not quite broad enough to encompass all of the existing manifestations of this housing model in Canada today, although the basic outline generally applies to them all.

Objectives of the model

It has been pointed out that the small group living alternative serves those seniors who fall into what has been termed an "affordability gap" between government subsidized housing and privately funded/ownership options (Lusk, 1994, p.67; Murray, et. al. 1988, p.3 Executive Summary). Not only does the small group home option provide a board and care alternative that is purportedly more cost-effective than larger institutions, but also this option potentially delays or reduces the need for institutionalization (Hollo 1988; Heumann & Boldy 1992).

It has been shown in Sweden, the UK and the US that even dementia sufferers can potentially benefit from the group home model (Gallagher 1994). It has been speculated that the rate of institutionalization in the U.K. might be lower than in Canada because of the high number of seniors living in sheltered and Abbeyfield housing. The value of sheltered and supportive housing models may lie in their limited support services. Zeisel argues that "...superfluous services effectively take away independence rather than support it" (CMHC, 1988 p.84).

LITERATURE REVIEW

A literature search of CMHC sponsored research project reports, conference proceedings and other documents yields a fairly substantial number of references to small, supportive shared housing models, including the Abbeyfield model. However, examples of some of the alternatives described are still relatively few in number and some are untested in Canada. More needs to be learned about the characteristics, appropriateness and effectiveness of small group homes for seniors in the Canadian context.

Canadian publications concerned with small, supportive, shared housing completed to date include those by Murray (1988), Shimizu (1988) and CMHC (1991). Murray's report provides a strong argument in favour of the general model of semi-independent living, and demonstrates that many countries around the world are paying serious attention to this solution to aging-in-place. Data from Murray's study showed respondents preferred most of the essential characteristics which define supportive group homes. The supportive small group home model also receives favourable reviews from American researchers (Strieb, et. al. 1984; Golant, 1992).

Murray (1988) speculates that some potential obstacles exist in Canada to the successful development of these types of homes. These include zoning and building restrictions and local market conditions. While the Murray report has been the most significant contribution to the Canadian understanding of the Abbeyfield-type supportive housing concept to date, it does not identify *specific* obstacles to development of this model and how they were overcome. Golant (1992) notes that, "We in fact know very little about the successes and failures of this form of shared group housing arrangement because it usually operates outside the auspices of any organization"(p.242).

Objectives of the Research

The goal of this project was to produce a guidebook appropriate to the Canadian context. It is based on an analysis of the planning, financing, site selection, design, development, start-up and resident recruitment process of a sample of Canadian Abbeyfield Houses, and other small group homes for the elderly across Canada. Case histories were collected with respect to the context and circumstances of their development, the key players in this process and their roles. Comparison and critical analysis of these projects' development experience provides insight into the process of implementing this residential option. The specific problems experienced and their respective solutions are highlighted.

Existing Guidelines

While a development guide published by the UK Abbeyfield Society (1987) provides some valuable advice for Canadians embarking on the development of their first group home project, the language, content and organization of the book are very specific to time, place, product and accepted procedure in the UK The development process outlined in the guidebook is dependent on a clearly established administrative hierarchy within the UK national Abbeyfield organization. Further, the guidebook is neither analytic nor explanatory, and assumes that sufficient experience has been gained by Abbeyfield UK that the steps laid out in the guidebook should be universally followed. As well, the design guidelines and sample floor plans are not directly transferable to the Canadian context. For example, specific references are made to British Building Regulations, and to specific classifications for this type of residential facility that have limited applicability here in Canada. Furthermore, the accepted and recommended space standards in this guidebook are substantially lower than those generally expected and provided to date in Canadian examples of Abbeyfield houses.

In contrast, the current report details the progress of in-process and completed supportive group home projects in Canada and identifies the most successful and appropriate strategies for the Canadian context. These recommendations vary from situation to situation, and from those derived from the UK or elsewhere.

POLICY RELEVANCE

A Response to a Changing Society

The impact of population aging and health care reform on the built environment will be significant. The current costs of institutional long term care are prohibitive for both governments and individuals. The potential contribution of this report to the housing market is in *facilitating easier and faster development* of supportive group homes in existing neighbourhoods and new developments.

Resource Conservation & Responsible Planning

The study has yielded some interesting perspectives on the re-utilization of existing building stock and rehabilitation of older neighbourhoods. Group home development permits re-use of existing and sometimes heritage housing stock as well as urban infrastructure, incrementally increasing density in underpopulated inner city areas *without* negative impact to character or property values. It has been argued that the "Canadian housing stock is numerically adequate, [and that] any additions should strategically be used to improve the quality and flexibility of the current stock" (Brink 1994, p.103). Many countries, such as Denmark, the Netherlands and Sweden are currently focusing efforts on the adaptation and rehabilitation of existing, older housing stock to meet the needs of large numbers of the elderly who are already living in these neighbourhoods (CMHC, 1991-2: Darke, p.34). The importance of neighbourhood redevelopment and intensification are underlined by Peddie: "By placing seniors in established communities, housing providers are enhancing the comfort and security of the elderly through neighbourhood familiarity and proximity to an existing range of appropriate support services" (CMHC 1988: Peddie, p.115).

Government Support

The first Abbeyfield house was established in England in 1956. Acceptance of the Abbeyfield concept was initially very slow, but there are now over 1000 Abbeyfield houses in the UK (Wilson, 1990). Acceptance in Canada is reflected in the rapid growth of Abbeyfield houses, particularly in B.C. where thirteen have been developed since 1987 and several more are under construction or in the planning stage. It is important to note that much of the initiative to date has been on the part of volunteers and non-profit societies with only limited funding from government in the late 1980's. However, in the UK expansion of the model was greatly facilitated by government support and financing. Wilson (1990) argues that "the key to *widespread* adoption of the Abbeyfield model in B.C. [and Canada] will be, as elsewhere, acceptance by government" (p.5). This report may facilitate acceptance by all levels of government by drawing attention to the effectiveness, flexibility and popularity of this housing model.

AIMS OF THE STUDY

Specific Objectives

The overall goal of the project is to produce a number of key recommendations, guidelines, and development strategies that will shorten the learning curve for the volunteers (i.e. non-professionals) who usually develop small group homes for seniors. By clarifying the development process for these volunteers it should be possible for them to short-circuit many of the problems that are commonly encountered. In addition, professionals and bureaucrats can benefit from understanding what others like themselves have done in similar situations. Specific objectives of the research were:

1) To document, compare and contrast the development of a sample of small supportive group homes for the elderly in Canada. This includes a detailed description of each sponsor/group's organizational structure; fund-raising and financing strategies; process followed in site location and land acquisition, selection of architect and design of building, rezoning and development approvals, building code conformance and building permit approvals, construction timing and process, staff hiring, resident selection, occupancy and start-up, and costs.

2) To identify areas where sponsoring groups had particular difficulties or obstacles to overcome, and record how these problems were resolved. As well, to identify the source or cause of the difficulties from the perspective of the different players, and how they might have been avoided or minimized.

3) To highlight aspects of each project where particular circumstances, knowledge or creative use of systems supported the smooth execution of the project or gave it some advantage.

Who Can Benefit from This Report?

The results of this study provide a valuable educational tool. For example, familiarity with the small group model on the part of various officials might lead to changes in policies, rules and regulations, codes and by-laws. Group homes are typically located in low density, usually single-family neighbourhoods. Many zoning by-laws and building codes do not embrace the small group home and it is often extraordinarily difficult to get approvals from municipal officials. Organizers must deal with ignorance, biases and bureaucratic regulatory restrictions (CMHC, 1991-2: Gray, p.140; CMHC, 1988: Snowie, p. 16, Peddie, p.115, Hawley, p.116, Geller, p. 127). An informed and supportive approach by municipal officials can make a great difference in the overall process.

Because of their location in single-family residential areas, group home developers must also deal with neighbourhood opposition and the negative attitudes, misinformation and prejudices of local residents, often called the NIMBY (Not In My

Back Yard) syndrome. This problem has been cited by participants in CMHC conferences on seniors housing as one of the most important obstacles to be overcome in the acceptance of innovative or non-standard forms of sheltered housing for seniors (CMHC, 1991-2: Hart, p. 142; CMHC, 1988: Dobkin, p. 10).

Municipal elected representatives who have the power to streamline approvals but are accountable to their voting public, (the most outspoken of whom are often members of conservative ratepayers' associations) will also benefit from exposure to the study findings. The results of the study will also assist seniors' groups in lobbying for changes to municipal land-use policies and procedures. Those in favour of community integrated residential options for the elderly have not up to now been able to compete with property owners concerned with protecting their property value or maintaining the character of their neighbourhood.

OUTLINE OF METHODOLOGY

Potential case study projects were identified through consultation with an Advisory Committee of housing experts, and other housing experts and agencies across the country. Projects were selected with an attempt to include projects representative of the following selection criteria:

- geographical location or region,
- funding source,
- age of house or maturity of sponsor,
- form of tenure,
- stage of development, and
- socio-economic status of target population.

A qualitative and content analysis of the data was conducted, including creation of timelines for each project to synthesize the information provided by different informants. Then variables were compared between projects and categories of projects using an analytical matrix. This matrix was then used to identify the typology of projects. For a detailed review of research methodology and project selection criteria, refer to Appendices B and C.

SUMMARY OF FINDINGS & DISCUSSION OF VARIABLES

Before Development

1.) *Organizational Structure*

As can be seen in Table 1, the organizing sponsors of all but two of the 22 case studies included in the study are non-profit. Of these twenty-two, fifteen are affiliated with the Abbeyfield Houses Society of Canada, five are independent, non-profit seniors' housing societies, three are sponsored directly by a church, and one by a non-profit continuing care society. Of those Abbeyfield societies included in the study, two are affiliated with a local church and five projects received significant sponsorship or support from a local service club, such as the Lions, Kiwanis, IOOF or Kinsman societies. Two Abbeyfield houses were the product of partnerships or had major support from both a church and a service club. Two Abbeyfield houses are the result of significant partnerships or arrangements with municipal governments.

One group began as a resident-organized equity cooperative, but due to difficulty retaining sufficient committed members, reverted to a typical, non-profit rental Abbeyfield house society. Another group represents a private sector development that evolved out of a small-group condominium project independently developed by a group of seniors. A third constitutes a provincially sponsored, private owner-operated license care facility.

See **Table 1: Organizational Structure and Form of Tenure**, following page.

It is interesting to explore the question of whether partnerships with existing community groups are significant determinants of project success. A little over half of the 22 case studies attempted or are attempting to carry out the development of a small-group, community-based, supportive residence for seniors without the assistance of a major community-based partner, such as a church, service club, or municipality. Nine of these were developed under structured provincial government funding programs. A case could be made that most of these groups had the advantage of exceptional organizational abilities, networks and/or resources. On the other hand, it could be argued that the existence of strong organizational abilities and broad networks are the primary determining factors in the success of projects, and that the significant community partnerships evident in the remaining projects are an outgrowth of networks combined with abilities. If this is the case "independent" projects are at no particular disadvantage, since their success depends largely on the abilities of the core group. Religious organizations, service clubs, and municipal housing departments can, however, be seen as a significant source of skilled and committed human resources from which to draw and replenish volunteers.

TABLE 1: ORGANIZATIONAL STRUCTURE & FORM OF TENURE

	PROJECT A	PROJECT B	PROJECT C	PROJECT D	PROJECT E	PROJECT F	PROJECT G	PROJECT H	PROJECT I	PROJECT J	PROJECT K	PROJECT L	PROJECT M	PROJECT N	PROJECT O	PROJECT P	PROJECT Q	PROJECT R	PROJECT S	PROJECT T	PROJECT U	PROJECT V	TOTAL #
Organizational Structure																							
Non-Profit Society	√	√	√	√		√	√	√	√		√	√	√	√	√	√	√	√	√	√	√	√	20
Registered Charitable Status	√	√	√	√		√	√	√	√		√		√	√	√	√	√	√	√	√	√		18
Church Affiliation	√							√			√	√	√			√				√			7
Service Club Affiliation						√								√	√	√			√				5
Municipal Dept. Affiliation									√								√						2
For-Profit Strata										√													1
Non-profit licenced care																					√		1
Form of Tenure																							
Private owner-operator					√																		1
Subsidized Rental	√		√	√	√	√	√		√		√												8
Rental	√	√	√			√	√	√	√				√	√	√	√	√	√	√	√	√	√	17
Life-Lease Tenancy												√											1
Strata Title										√												?	1

GENERAL NOTE: Projects have been labeled A, B, C, ... etc. in the tables to maintain the confidentiality of project particulars, and the privacy of key informants and other participants. Case studies, however, have been organized chronologically by completion date (when available) to facilitate comparison and tracking of influences. For a differentiation between new purpose built and renovated buildings, refer to Table 5: Selection of Architect & Design of Building.

It is also possible that all such projects take on a life of their own, and should the original organizing group lack sufficient skills, contacts or resources to complete the development process, it does not logically follow that the process dies. Rather, it takes longer, and in fact may flounder in relative non-productivity until such time as circumstances change or different players become involved in the process to provide the necessary impetus to carry the project through to completion. Therefore, all such efforts are eventually "successful"; but the question remains: "at what cost?" An extreme example of this situation is one project where the lead individual was a member of a service club who was forced to withdraw due to personal matters, and found that no other member was willing to pick up the cause. It sat, therefore, literally on a shelf, its future indeterminate for a year or more before a new member took it over.

The various non-profit societies and other groups included in this study have generally similar histories in terms of the group of individuals involved. Typically, one or two persons have initial exposure to a concept or program, whether Abbeyfield or otherwise, and decide that they personally support the concept and want to do something to create this opportunity in their community, either for themselves, or more often for the elderly in their community. The seed of the idea, or initial exposure to a built example, is quite often a chance encounter. Occasionally, individuals who work in the volunteer or service sectors for many years have had prolonged exposure to this and other housing options.

It is not uncommon with church groups, service clubs, and often with local municipal planning or housing departments, that there exists a general policy to facilitate supportive housing options for the elderly, or at least a general though vague desire to do so. Churches and many service clubs have traditionally been involved in the provision of non-profit seniors' housing or care facilities. Most municipalities have, on the other hand, generally tended to take a more reactionary and less pro-active approach, despite the acknowledgment of need and value. It remains for a concept or an interested individual to emerge with a proposal to set the wheels turning.

Despite the many people who's involvement is necessary to bring a housing concept to fruition, each project seems to have depended upon one or two key individuals who either initiated interest in the project, or recognized its value and carried it forward. These individuals were uniformly enthusiastic and committed, and were usually the ones determining the recruitment and selection of the others necessary to make up the sponsoring group or board responsible for the project's development. Without these individuals' initiative, no organization would begin.

This selection process, and the resultant make-up of the groups, was extremely varied. In some instances, organizers issued advertisements to interested parties, and presented the concept at public meetings, or made announcements to church congregations or other gatherings. Those interested individuals remaining after a couple meetings essentially made up the sponsoring board or committee chairs. Sometimes this kind of group would then seek out involvement of one or two others with specific skills or affiliations. By contrast, other organizers took a deliberate and strategic approach to recruiting board members. In several cases, the lead individual carefully selected members of the community with specific skills or connections, such as architects, lawyers, realtors, contractors, politicians or bankers. These individuals would then be briefed and issued personal invitations, along with a very clear outline of what contribution they were expected to make to the sponsor and the project.

It was observed that groups who took the latter approach provided for a clearer understanding of defined roles and responsibilities specifically matched to the demands of project development, as well as the likelihood of more established and tested relationships between individuals. The open, more random process, though it may have other advantages, was at risk of inadvertently inviting one or more individuals who became obstructive to the process for personal or political reasons. This kind of obstacle can have a devastating effect on a small-group, grass-roots, volunteer organization's ability to function effectively and work together to overcome the many challenges that face them from outside the group.

2.) *Financing Strategies*

A variety of financing strategies, including fund-raising, were undertaken by the organizers of the case study projects. Most of the earliest projects, those developed prior to 1992 (1994 in Quebec), were developed under the auspices of a provincial housing ministry funding program. These provincial housing ministry funding programs required a specific and detailed application process which regulated the steps the sponsor was required to follow. The requirements of this process were typically so complex that many of these sponsors had little choice but to retain a development consultant familiar with the stipulations of the housing ministries to manage and advise them through the process.

See **Table 2: Financing Strategies & Fundraising Sources**, following page.

Neither the province of Ontario, nor of BC any longer provides funding for this category of housing. Quebec is in a similar situation. It is therefore of particular interest to examine the approaches used by those projects which were successfully developed without government funding.

By contrast to these earlier projects and the Quebec projects, the vast majority of the projects (15 projects) surveyed had or have some kind of private financing. Mortgages were divided nearly half and half between bank or credit union mortgages that were insured by CMHC, and those that were not. Four of the projects surveyed made arrangements for private loans or mortgages other than with lending institutions. These included loans from pension funds, churches, and private individuals.

TABLE 2: FINANCING STRATEGIES AND FUND-RAISING SOURCES

	PROJECT A	PROJECT B	PROJECT C	PROJECT D	PROJECT E	PROJECT F	PROJECT G	PROJECT H	PROJECT I	PROJECT J	PROJECT K	PROJECT L	PROJECT M	PROJECT N	PROJECT O	PROJECT P	PROJECT Q	PROJECT R	PROJECT S	PROJECT T	PROJECT U	PROJECT V	**TOTAL #**
Fund-Raising Sources																							
Government Grants	√	√					√	√	√							√	√	√	√		?		9
Provincial Funding	√		√	√		√	√	√	√		√						√						9
Private Fund-raising	√					√		√	√					√	√			√	√		?		8
Large Endowments/Donations	√	√				√							√	√	√	√	√		√	√	√		11
Small Donations	√	√				√	√	√	√			√	√	√	√			√	√				12
Societies/Foundations etc.	√	√				√	√	√	√				√	√	√	√		√		√			11
Individuals	√	√				√	√	√	√		√	√	√	√	√		√	√	√	√	√		16
Donations in kind		√											√						√				3
Financing Strategies																							
CMHC Insured Mortgage/Loan	√	√		√		√	√				√?				√		√		√				9
Bank Mortgage			?		?			√		√				√	√	√		√	√				7
Private Mortgage		√										√								√			3
Proceeds from sale of land																				√			1
Proceeds from sale of units										√													1
No Mortgage									√				√										2

Fundraising strategies varied, ranging from bake-sales to soliciting corporations and congregations, from bingos and casinos to applying to foundations, from selling bricks to inviting donations of labour and materials. These methods also vary tremendously in terms of the amount of revenue they were able to generate. Generally speaking, some significant amounts of money were collected from foundations, although as many groups were unsuccessful as successful. The success of various fund-raising strategies depends to a large degree on the support of the local community, and on timing. When the economy is slow, private individuals give less, and there is greater competition for public funds, such as those provided by lottery and other foundations and philanthropic groups.

It is notable that the group attempting to organize an equity cooperative was not eligible for any public donations, but was the recipient of a significant private donation from a former member and organizer, which allowed them to maintain two units for subsidized rental within the equity situation. Significant donations of money or property were received from private individuals in three or four situations, and from charitable organizations to varying degrees in five or six others. Another form of charitable support came in the form of low or no-interest loans with little or no collateral.

3.) *Site Selection and Property Acquisition*

There were four general sets of circumstances surrounding the selection and/or the acquisition of property for the development of the case study projects. These were, in brief, situations where an organization (1) *purchased* land or an existing building, (2) *leased* the land from either a church, church diocese, municipality or province, (3) already *owned* the land, or (4) where land and/or buildings were *donated* to the sponsor for the project.

See **Table 3: Site Location & Land Acquisition**, following page.

Where land or a building were *purchased*, the process of searching for and selecting the final site varied between organizations. All sponsor respondents were asked if there were explicit or implicit site selection criteria guiding this process, or which may have been applied to a site evaluation if the property were already owned. Almost all repeated a number of important site criteria, which included: proximity to shops and amenities; access to transportation; a flat, accessible site, in a good, stable, identifiable residential neighbourhood or community. Less often, an area with a significant proportion of the population elderly was preferred. A small number of groups, on the advice of a development consultant or a municipal planner, added that a site already be appropriately zoned to accommodate the group-home project. This was strategically designed to avoid the costly, time-consuming and often troublesome re-zoning application procedure. The predilection toward this approach, however, is dependent on the local land-use and zoning by-laws. Some groups might have done better to search for a pre-zoned site rather than rezone a property that was already available, difficult though this may seem at the outset.

TABLE 3: SITE LOCATION & LAND ACQUISITION

	PROJECT A	PROJECT B	PROJECT C	PROJECT D	PROJECT E	PROJECT F	PROJECT G	PROJECT H	PROJECT I	PROJECT J	PROJECT K	PROJECT L	PROJECT M	PROJECT N	PROJECT O	PROJECT P	PROJECT Q	PROJECT R	PROJECT S	PROJECT T	PROJECT U	PROJECT V	TOTAL #
Site Location																							
Centrally Located	√			√						√	√	√	√	√	√		√	√	√				11
Accessible Transportation	√		√	√		√							√	√	√				√	√			9
Shops & Amenities Nearby				√							√	√	√	√	√			√	√				8
Isolated from Services				√			√																2
Land Acquisition																							
Land/Building Donated															√						√		2
Lease Arrangement						√		√	√			√	√			√	√						7
Purchased - Located by Realtor	√		√				√												√				4
Purchased - Located by Society	√	√	√	√					√	√	√			√				√	√				10
Purchased - Located by Municipality						√			√								√			√			4
Purchased/Market lease from church			√								√					√							3
Provided/Owned by Church								√				√	√						√				4
Considered Other Sites		√					√			√				√			√	√	√	√			8

Methods also varied, as individual board members of some sponsors conducted the search and review of potential sites themselves, while others retained real estate agents to provide this service. Others were fortunate to have a realtor on the board who led this exercise and offered their expertise as well. Some sponsors took the innovative approach of advertising their need, and their criteria for a suitable site, in a local newspaper. This created the possibility that potential donors or vendors of appropriate land or buildings in the community are made aware of the existence of the sponsor's intentions, and come forward. Although some potential sites did emerge by this method, none of the final building sites were selected from these. Some sites were presented, however, based on a written appeal sent out to various agencies and governments in search of land.

Several (12-14) of the sponsors searched for a suitable site for three to six years; a few (approximately 8-10) were able to locate a suitable site in a year or less. In some instances, a suitable site was located though it was not affordable, or funding that was expected to be in place did not come through in time to secure it. In more than one instance, options on specific sites were placed, though difficulties caused the group to surrender the properties. These difficulties sometimes involved finances, and other times difficulties with zoning or re-zoning. Thus it was not the location of property that caused these groups difficulty, *per se*, but the timing of their various preparations. These delays added to the difficulty of identifying an appropriate site, as potential sites had to be passed up for other reasons.

There was also some mention of a preference for a heritage house or building among a few groups considering a renovation or addition approach. This criterion, however, was only rarely met when all the other factors, including affordability and availability, were considered. There was a greater preference to build new, because of the combination of constraints imposed by an existing, older building, and the greater cost of renovation over new construction. Several of those projects which did purchase a building and renovate and/or add-on, did so only because there were no *vacant* lots available in what were considered attractive locations.

This is an understandable dilemma in most developed older urban areas, where many seniors live, and shops and amenities are within walking distance. The more suburban locations in larger municipalities often compromised proximity to shops and services in order to build new buildings on affordable, vacant sites. Most new construction in well-placed, high amenity areas are located in smaller towns where affordable, vacant land was still generally available. Alternatively, they were built on land that was owned by a church or municipality, and had remained vacant despite the pressures of urban growth. Most sponsors' were generally satisfied with the project property and location that they ended up with, and some were very satisfied. No projects were poorly located, but proximity to services and safe secure neighbourhoods had to be compromised to various degrees. Projects ultimately developed on land that was previously *owned, donated* or *leased* to the sponsor were naturally less able to apply the various site selection criteria outlined above. Though some of these sponsors were critical and selective even under these circumstances, they were often not in a position to reject the site(s) that were made available to them, and were therefore less likely to articulate locational shortcomings or unattractive features.

It is this dilemma between finding good locations and finding affordable, vacant property that has, in part, led to the important role that churches have played in making sites available to non-profit housing societies, and particularly Abbeyfield societies. Of the 22 case study projects, seven were developed on property owned, or previously owned by a church. Two were sold to the sponsor, two were leased to the sponsor for a nominal amount, and three projects were developed by church groups on their own land, with independent housing societies set up after-the-fact for the purposes of on-going management. Two churches which owned property traded their original properties for ones in preferred locations. Two of these seven sites are exceptionally well-located in service and amenity rich older inner-city neighbourhoods. The remaining five are in suburban or rural locations, three of which are well-served by public transit and reasonably proximate to service areas. The added, hidden advantage of church-owned properties, which are usually adjacent to churches, is that they are often zoned "Institutional", which in addition to assembly uses, generally permits many kinds of housing and care facilities for the elderly. There are exceptions even to this rule, however.

Despite all the advantages associated with using church land, one negative did emerge. It was observed that because many Canadian Abbeyfield houses were developed by, or in affiliation with, churches - mainly Anglican churches, this led to a perception that Abbeyfield houses in particular were intended for members of these religious groups. This phenomenon is better explained by the above discussion about available and affordable land, as well as perhaps by the fact that the Abbeyfield concept originated in the United Kingdom and disseminated through British, often Anglican, émigrés in Canada.

The Abbeyfield Houses Society of Canada, and its local affiliates, are explicitly non-denominational. For some organizations serving other communities, however, this perception may have created a deterrent to their affiliation with the Abbeyfield society, despite support-in-principle for the concept. Efforts have been made to clarify this issue through information dissemination. This perception may also disperse when people become aware of projects that are similar to, but are not Abbeyfield houses, developed under other programs across Canada. Except for one case study developed by a church organization for the elderly members of its own congregation, which was not an Abbeyfield-affiliated sponsor, all the projects included in this study are non-denominational and non-ethno-cultural specific. Some similar projects were identified which serve specific religious or ethnic groups of elderly (e.g. Jewish-Canadian, Japanese-Canadian and aboriginal elders), but these were not included in the study due to time constraints.

The projects that are very well-located include two that were developed on municipally owned inner-city land in larger metropolitan areas, and leased to the housing sponsors. Other sites that were quite well situated were located and purchased, with perseverance, by sponsors in medium to small communities. It is important to note that of all case study projects developed in larger centres, whether in inner-city or older, central-suburban neighbourhoods, only one purchased land outright. It was an explicit observation by these groups that without land leased from either a church or a municipality at a non-market rate, their projects would not have been financially viable. Some projects in metropolitan areas were also required to develop double houses (i.e. twice as many residents) in order to make their projects viable. The one sponsor that purchased a site in a metropolitan centre did so from a church, who was supportive of the concept, and gave the ample time to organize their financing.

In only one case study was a house and property donated to the sponsor for use as supportive seniors housing, although this situation is known to have occurred in other instances. This sponsor, though considering converting the older, single-family home to an Abbeyfield house, was also considering other options, such as respite care. At the conclusion of this study, a decision had not yet been reached. Because there is no choice whatsoever in terms of the location of a donated site, it is important to critically evaluate the suitability of that property for the intended use.

4.) Feasibility Analysis & Needs Assessment

Development consultants were formally retained in 2 of the 22 case studies. In two additional case studies, development advice and assistance was formally provided through federal and provincial funding programs. These professionals also determined feasibility and conducted needs assessments. In several other instances, expert development advice was acquired informally through acquaintances of board members. The decision to obtain this assistance was generally brought about by circumstances that were perceived to be more complex than a typical project. Often this had to do with the requirements of a provincial Housing Ministry funding program, which required demonstration of both need and feasibility. In addition, the application process and protocol was best handled by someone who was familiar with these government programs and procedures. Knowing how to best approach this funding application and approval process was critical to successfully compete for and ensure funding approval. Generally, the government ministry also required a detailed report.

Development consultants that offered informal advice and guidance to committees were generally individuals working in government agencies, experts in the non-profit housing sectors, or ex-employees of government housing agencies. Often, these advisors and consultants were also involved in assisting or advising the board in the selection and rezoning of suitable property, and especially assisting with financing and feasibility for the project. Formal needs assessment surveys were conducted in eleven cases. In all of these, more than adequate need was demonstrated in terms of the large proportions of the local populations that were elderly and in need of supportive housing options. In most other cases, the sponsors were familiar with the local population, their needs, and the inadequacy of sheltered housing options in their area. In the few instances where there was in fact an Abbeyfield or other small-group home precedent already in their locality, demand could be inferred from waiting lists.

See **Table 4: Size of Community, Feasibility Analysis & Needs Assessment**, following page.

Size of community did not have any apparent influence on the feasibility of case study projects. Both privately and publicly funded projects were located in both urban and rural areas with equal success. The small size of the project, by definition, seems to render it both affordable and manageable for groups developing the project in very small communities as there was always more than adequate demand to fill 5 to 10 units. In this sense it is a very versatile project type, addressing the needs of both small towns or villages and urban neighbourhoods.

5.) Selection of Architect and Design of Building

Architectural consultants were retained in all but two case study projects. One exception was the adaptation of an older building that required very few modifications to accommodate the group home. This group did however retain a development consultant which had designers on staff to assist with those changes that were necessary. Another similar project was an older house adapted to accommodate the group, but added to incrementally over a period of several years as funds for additions became available. Architectural consultants were retained to assist with these changes in the latter case, however, were not involved consistently throughout. In one case, a private sector developer provided in-house design services, rather than retain an architectural consultant. Because of this developer's expertise with the development process, the ongoing advice and guidance of an architect was not deemed necessary.

The architects retained were selected in a variety of ways, ranging from careful interviews and reviews of related experience to completely random events such as charitable "lotteries". More commonly, however, sponsors retained architects who were known to them (n=7) or who came highly recommended by someone knowledgeable (n=8). Two architects came forward as volunteers. Only two sponsors went through the traditional process for selecting an architectural consultant, involving referrals from developers or related project owners, requests for proposals and interviews with at least three candidates, before selecting the consultant considered the most suitable in both experience and ability, and compatible with the sponsoring board. While provincial architectural associations provide literature to assist groups in making this decision, most appear to be more comfortable making this choice based on personal knowledge or trusted referrals.

TABLE 4: SIZE OF COMMUNITY, FEASIBILITY ANALYSIS & NEEDS ASSESSMENT

	PROJECT A	PROJECT B	PROJECT C	PROJECT D	PROJECT E	PROJECT F	PROJECT G	PROJECT H	PROJECT I	PROJECT J	PROJECT K	PROJECT L	PROJECT M	PROJECT N	PROJECT O	PROJECT P	PROJECT Q	PROJECT R	PROJECT S	PROJECT T	PROJECT U	PROJECT V	TOTAL #
Size of Community																							
Central Metropolitan							√		√			√				√			√				5
Suburban Metropolitan						√		√					√				√					√	5
Medium-sized City		√			√									√							√		4
Small Town	√		√							√								√		√			5
Rural Community				√							√				√								3
Feasibility/Needs Assessment																							
Development Consultant Retained			√				√									√	√	√		√			6
Development Consultant/Resource Coordinator Assigned				√	√						√												3
Needs Assessment Survey	√		√	√			√	√			√	√			√				√	√	√		11

Consultants rarely had specific knowledge of the Abbeyfield or supportive group home housing model. Four of these consultants were familiar with the models in question. Several other Architects, however, had had some experience with seniors' housing, care facilities, or social housing. Six additional consultants brought some related experience, over and above standard, single-family house design, though it was argued by some that no special design knowledge was necessary because of the small size and simplicity of these projects. A further seven architects had no experience designing housing for the elderly of any type. Some architects had arguably an excess of experience with another, less relevant building type, which influenced their design approach and detailing in an inappropriate way.

See **Table 5: Selection of Architect & Design of Building**, following page.

The groups that selected an architect formally did not necessarily choose one who was familiar with the concept, or had related experience. After going through this detailed selection process, the architects' general abilities, personal manner and methods of working with the group were more important criteria. A more relevant query might be whether a given architectural consultant has experience working with small groups of volunteers and non-profit societies rather than, or as well as, familiarity with group home design for elderly residents. This does not reveal, however, whether those architects with relevant experience or familiarity with the concept designed better buildings, since this study does not endeavour to critique them on this basis.

In virtually every case study, the architect or members of the board, or both, visited and toured at least one existing Abbeyfield house or group home precedent, or at least reviewed photographs and drawings of relevant projects. The earliest projects had few or no Canadian precedents, but sponsor members seemed to be familiar with and had visited Abbeyfield houses in the UK. Where the Abbeyfield model was not the precedent, other relevant sheltered housing schemes were reviewed as models. The later the project was built, the more examples of this project type there were available locally or regionally, and the less likely they were to refer to British examples. Despite visiting and reviewing built precedents, the tendency was for both owners and architects to attribute very little, beyond a basic understanding of the concept, to these examples.

This tendency to innovate relates to the fact that the design of these small, supportive group homes has evolved in space standards and amenities such that older examples, and particularly foreign examples, have had less relevance over time. Many of the specific design decisions were made on the basis of common sense, personal experience or preference. Often a client and designer would be reacting to some specific feature that they did not like, or that was reputed to be problematic. Occasionally specific design decisions were made because of a desired outcome in terms of how the residents would use the space, or feel about the home. In any case, the responses of the residents to spaces did not always conform to expectations. Generally, however, the assessment of precedents, and the design decisions made, were highly subjective. To a large extent, each design solution was a response to the individual circumstances, whether site and context, budget or local architectural style, etc. It is possible that the degree of innovation, and the

TABLE 5: SELECTION OF ARCHITECT & DESIGN OF BUILDING

	PROJECT A	PROJECT L	PROJECT Q	PROJECT U	PROJECT V	PROJECT B	PROJECT P	PROJECT I	PROJECT H	PROJECT F	PROJECT T	PROJECT C	PROJECT J	PROJECT M	PROJECT N	PROJECT K	PROJECT E	PROJECT O	PROJECT R	PROJECT D	PROJECT G	PROJECT S	TOTAL #
Architectural Consultant																							
By Referral	√	√		√	√	√	√	√			√		√	√	√	√	√						13
Invited Proposal																			√	√			2
Experienced in Senior's Housing	√					√			√				√		√	√	√		√				8
Prior Knowledge of Abbeyfield									√						√								2
Full Scope of Services	√			√		√	√	√	√		√	√	√		√				√	√			12
Building Design																							
Purpose Built	√				√	√	√	√	√	√	√	√	√		√	√				√			13
Renovation		√	√	√					√					√			√	√	√		√		9
Addition														√			√	√	√				4
Two (or more) Houses on Site								√	√	√						√							3
Influenced by other projects		√			√			√		√	√						√		√	√			8
Number of Units	9	7	5	8	6	12	10	9x2	9x2	8x8	10	7	10	9	9	10x2	10	8-10	10	10	?		

subjective approach to design solutions have to do with the small-scale, familiar residential nature of the housing type, with which each individual would have more personal experience. Undoubtedly a critical design analysis and a user satisfaction survey would reveal more about the relative effectiveness of the various designs, however, this is not the context for such an inquiry.

See **Table 6: Client Satisfaction with Architectural Consultants**, following page.
Cross-tabulation of client satisfaction with selection method for architectural consultants

The actual or intended project residents were generally not involved or consulted in the design process. Only in the instance of the owner-occupied Abbeyfield co-op did the residents participate in the design process, because they were also board members. While this general lack of user consultation may be a shortcoming of the design process, boards and designers appeared to be reasonably sensitive to the importance of maintaining a familiar, residential image, and both practical and social issues affecting the operation of the house.

As mentioned above, a fair degree of variation appeared between one project and another, even where one project served as an example for another. Where existing buildings were converted to accommodate the group home project, this is understandable. There are of course local site conditions which influence the layout and orientation of the floor plans. As well, a gradual increase in space standards and design features is also discernible, from the earlier projects that provide minimal private space similar to the UK projects, to the later projects that provide somewhat more space.

The tendency to provide ensuite powder rooms was an almost immediate Canadian innovation, except where this was precluded by existing conditions. Later projects aimed at including ensuite showers as well, although not every project budget could accommodate this feature. Greater variety in space and design features were attributable to the project or sponsor's financial resources.

Projects not directly influenced by the Abbeyfield housing model were different again, in that they were often clusters of self-contained units, either studios or one-bedrooms, which included not only a full bath but also a small kitchen. High-end Abbeyfield inspired projects, too, however, included small kitchenettes even in their bed-sitting room/studios.

TABLE 6: CLIENT SATISFACTION WITH ARCHITECTURAL CONSULTANTS

	Degree of Satisfaction with Performance			
	Not Satisfied	Somewhat Satisfied	Mostly Satisfied	Very Satisfied
Method of Selecting Architect				
Chance			1	
Volunteered		1		
Known personally	1	1	2	
Previously worked with			1	1
Referred by reliable source			3	3
Proposals solicited			2	
Architect's Experience				
No previous familiarity with building typ	1		1	
Limited familiarity with building type			2	
Experience with related building types		2	5	3
Familiarity with specific building type			1	
Expertise on specific building type				1

Further constraints were placed on design by funding agency guidelines, codes and bylaws and cost. Both provincial housing programs and CMHC mortgage insurance have attendant space standards, which while they are expressed as minimums, also determine spending limits. It was not common for building codes to significantly affect building costs. The requirements for these projects conform either to multi-family housing standards or to group home standards for the smaller projects. Local zoning, land use and parking by-laws, however, because of their greater variability, sometimes did affect costs. In one instance, a project was required by the local building by-law to be of non-combustible construction, though the provincial funding approval agency required only wood-frame. This additional cost placed constraints on the size and quality of the project within the fixed budget.

Often additional costs were born by project owners as part of municipal approvals, sometimes stemming from zoning or parking by-law requirements, sometimes required by city engineering. These development cost charges vary tremendously from one municipality to another (from nothing to several thousand dollars), and where they were significant, often took project owners by surprise, causing a great deal of frustration. An experienced and knowledgeable design or development consultant, in principle, helps project owners anticipate and plan for these additional costs and delays prior to the construction phase, or negotiates more favourable terms with the municipal authorities where possible. Familiarity with both local and provincial regulations and procedures are, and should be, important criteria for sponsors engaging a consultant.

6.) Rezoning and Development Approvals

While some project sponsors or owners were careful to select appropriately zoned land at the site selection stage in order to avoid a complex and time-consuming re-zoning process, others benefited from land that was appropriately zoned for other reasons. This includes, as discussed above, the common fact that church land, zoned institutional, usually includes some seniors' or congregate care facility approved use. In addition, projects in rural areas rarely have zoning restrictions. In one instance, a sponsor owned a parcel of land prior to the incorporation of a rural community, and this area was subsequently set aside for seniors' housing and services in the new land use plan.

See **Table 7: Rezoning and Development Approvals**, following page.

Finally, five of the case studies developed group homes with small enough numbers of units to be allowed within their municipalities' zoning by-law definition of "group home" permitted within any residential zone. Along with restricted numbers, typically under 5 or 6, these "group home" designations generally prevent two group homes, for any type of residents, to be located within a specified distance of each other (e.g. a five block radius, or 1000m.) The objective here is to minimize the impact a concentration of group homes might have on the character or property values of any given neighbourhood.

TABLE 7: REZONING AND DEVELOPMENT APPROVALS

	PROJECT A	PROJECT B	PROJECT C	PROJECT D	PROJECT E	PROJECT F	PROJECT G	PROJECT H	PROJECT I	PROJECT J	PROJECT K	PROJECT L	PROJECT M	PROJECT N	PROJECT O	PROJECT P	PROJECT Q	PROJECT R	PROJECT S	PROJECT T	PROJECT U	PROJECT V	TOTAL #
Land Use & Zoning																							
Public Hearings Required	√	√				√						√	√	√		√				√		?	8
Rezoning Required	√	√				√		√	√	√		√		√		√	√			√	√	?	12
Group Home Permitted in Residential Zone			√		√		√											√					4
Congregate Facility Permitted in Church/Institutional Zone													√						√				2
Zoning Prior to Project	R1	R1	R2-1	rural	R-1	R1	S	ch	RT2	C3	rural	P	P	R1	R5	P	R2	R4	R5	Pnc	R1		
Zoning After Project	P	R9a	R2-1	rural	R-1	P3	S	CD	CD	CD8	rural	P2	P	R2	R5	P5	CD2	R4	R5	PA1	?		
Bylaws Ammended		√							√			√		√	√	√							6
Site Subdivided										√			√			√	√		√				5
Difficulties in Approvals Process		√			√									√		√							4
Represented by Architect or Development Consultant	√	√					√	√	√			√	√				√	√	√	√	√		12
Community Involvement																							
Public Meetings/Presentations		√		√		√	√		√			√			√			√	√	√			10
Community Supportive			√	√		√	√	√		√	√	√	√				√	√	√	√	?	?	13
Neighbourhood Opposition	√	√			√		√		√	√		√		√							?	?	8

NOTE: Each municipal zoning by-law uses its own zone designations, but generally, these are logical: ie. zones with an R designation are Residential zones, the higher the number, the higher the permitted density; zones with a P designation are Institutional; zones with a C designation are Commercial zones, and CD represents Comprehensive Development, in which the specific proposed use or combination of uses are all that is permitted without further development approvals.

Municipal support and development approvals

A great range of types of attitudes and planning mechanisms at the municipal level, which allow these small group homes for seniors to be developed, exists between one locality and another. In some municipalities, there was a protective, almost aggressive attitude about this type of housing and the impact it may have had on neighbourhoods. In others, the planning department or council took a pro-active role in supporting and facilitating the project, up to and including making land and/or buildings available, and becoming managing partners with the sponsor. In the middle ground, some municipal planners took an active, supportive role in providing information, guidance and advice as well as support for projects, including site selection issues and rezoning problems. More typical is the planner, administrator or councilor who was supportive of this type of housing project in principle, offset by an active protection of neighbour rights, neighbourhood character, property values and a host of other municipal concerns such as density, sewage, parking and traffic.

While half of the case studies required no rezoning or development approval, the other half did have to or chose to rezone land in order to develop their group home projects. Of the twelve projects which rezoned their property, nine were in central or suburban areas of larger cities. It is probably fair to say that the larger the municipality, the more complex and bureaucratic the land use planning and zoning process. Of these case studies, however, only five had any real difficulty with the rezoning or development approvals process. While most of these also experienced some neighbourhood opposition, four also had to deal with some specific issue with the municipal authorities.

In one instance, the difficulty centred on the fact that a significant addition was being proposed to a heritage building, and the planner in charge required specific design changes to respect this, with which the client and architect were not in agreement. While this caused some frustration and delays, there was no opposition to the development proposal or proposed land use. Client groups attempting to re-utilize heritage buildings should be aware that additional requirements may exist which could delay the process or constrain design options.

Other examples involved complications, delays and costs associated with the provision of adequate parking on the site to meet parking by-law requirements. In one case, these matters were finally resolved, though not without difficulty and added expense on the part of the client group. Required off-site services and engineering costs added to the burden. Another group had to forfeit their deposit on a property because of inadequate parking space. A successful resolution was not possible due to significant neighbourhood opposition to the project. The project was finally developed on a different site, by a wiser and more experienced group.

The issue of parking is an important one, and has surfaced on other occasions, not only with respect to group homes for frail elderly, but regarding larger assisted living or sheltered housing projects for a similar resident group. Very few municipalities have been willing to relax parking requirements for multi-unit housing, despite strong and convincing arguments about the much lower probability that this population drives or owns private automobiles. While there are always exceptions, the ratio of required parking to units is arguably less than for young professionals or families. While they do not deny this fact, the difficulty for planners is the long term impact and responsibility of the municipalities with regard to the building. It is important for sponsors and developers of group homes for frail seniors to appreciate this dilemma, and the ultimate responsibility that municipal planners face. Conversely, planners must acknowledge the cost burden high parking ratios have on small, non-profit organizations attempting to provide affordable housing to the frail elderly, and the real needs of those residents.

The final example of difficulty with the rezoning process occurred in an older, metropolitan neighbourhood which was home to expensive, heritage homes and wealthy residents. No existing zone accommodated the proposed group home, and while a case was made for allowing group homes for seniors on institutionally (i.e. church) zoned property, the planning department was cautious about introducing a precedent that could then be followed throughout the municipality. Neighbourhood opposition had been extreme around a previous development scheme for the same site, and so an extensive public consultation process was undertaken. After reviewing the applicability of the new zoning category to other institutionally zoned properties throughout the municipality, and evaluating the potential impact this might have, a new zone was created with carefully defined restricted uses as endorsed by the public. This was an unusually thorough and involved review process created by the vocal and protective citizenry of this particular municipality.

Community support or opposition

It was anticipated that the case study development teams would have encountered significant opposition from neighbours, particularly where rezoning of the land was required. Group homes in general have had a rocky history, and have tended to be thrown together into one large, undesirable category. The survey and interview results were somewhat surprising, in that relatively little community opposition was faced overall.

Aside from the three projects referred to above, there were an additional five projects which experienced some degree of neighbourhood opposition. Four of these were relatively minor and short-lived incidents caused by a lack of public information, and consequent misunderstandings by neighbours about the nature and form of the project. This opposition dissolved at or after public hearings or information meetings at which neighbours had the opportunity to hear about the objectives of the project, and see design drawings.

One case, however, attempting to develop a group home within the allowances of the local residential zoning by-law was set back by a hostile special interest group who sued the owners and the municipality. This issue had, the year before, been resolved through a previous, successful lawsuit over discriminatory wording in the by-law, and resulted in a modification of the by-law. The unfortunate project in question had received development approvals prior to this incident, but when applying for occupancy permit encountered the same opponents. The municipality deemed only the prior definition offensive, and not the land use itself, and issued the permit. This decision resulted in further litigation, but was overturned by the provincial court.

Another project, while the neighbourhood opposition was not significant, had difficulty with a board and church congregation member who was opposed to the proposed location for the project, arguing that it was inappropriate for seniors' housing. This party was an aggressive opponent who also took the sponsor to court over the issue. However, it was not a successful suit.

Strong neighbourhood opposition can exist even where no rezoning is required and the project conforms to an approved use. Clearly, most problems occur when neighbours receive inadequate or inaccurate information about the proposed project, and disappear after their questions and concerns are addressed. Those client groups who thought they could slip past the attention of neighbours, or did not perceive a need to inform neighbours were often unpleasantly surprised. The "NIMBY" (Not In My Back Yard) literature supports this generalization, suggesting that the best way to avoid trouble is to get the local neighbours' support at the outset. Recent projects have benefited from the experiences of earlier projects, and most groups now understand the importance of public information. Common strategies include door-to-door visits, mailings within a three-block radius, open houses and teas, advertising through newspaper articles and television videos and public meetings. The results have been overwhelming, and often generate avid supporters and volunteers for the sponsor.

Despite this generalization, it is impossible to anticipate where and when an unpredictable opponent will appear. Obsolete wording in old zoning by-laws, and manipulative or opinionated citizens can exist anywhere, and through no fault of the developing sponsor, wreak havoc on the process. Perhaps as North Americans learn to accept a greater variety of housing options in integrated, mixed-use neighbourhoods, as Europeans have, this kind of opposition may disappear.

7.) Building Code Conformance & Building Permit Approvals

Very few municipalities have their own Building By-laws or Codes, and generally those that do are larger metropolitan centres. Most municipalities fall under the jurisdiction of either a provincial Building Code, such as the B.C. or Ontario Building Code, or where these do not exist, under the National Building Code of Canada. These various building codes are, in principle very similar, but the smaller the district to which a building code applies, generally the more detailed and demanding the requirements.

In some ways, the model under investigation: -- the small-group supportive living house -- is not new or exceptional in a physical sense. In many ways it is organized and operated like a large single- or extended-family home. The Abbeyfield Societies literature, in fact, likens the model and its ambiance to this familiar setting. In the UK, where large, older single family homes were the traditional setting for the establishment of Abbeyfield homes, this was the logical interpretation.

In Canada, however, has not been familiar with this housing option in the past, and does not generally have many existing, large houses which lend themselves to larger, family-like groups living together, the bias in interpretation is quite different. While the building codes are restrictive, the reason for this is that these documents are highly evolved, complex systems of regulations intended to protect both people and property.

The difficulty arises when a new or unknown entity emerges in the built environment. The complexity of the documents do not easily lend themselves to accommodate unfamiliar building types. When faced with difficult questions for interpretation, users of the code -- architects and municipal building inspectors -- tend toward conservative solutions. A large volume of change in the field, and usually a large span of time, are required before new needs are formally accommodated through changes in these building codes. Furthermore, while certain arguments can be made, and equivalencies proposed, the path of least resistance and cost usually remains conformance to an existing interpretation of the current building code. As a consequence, except for certain, smaller-scale examples which chose the "group home" or "boarding house" route, and those that are licensed Care Facilities, the tendency has been for the case study projects, while they are ostensibly "group homes," to be interpreted and built as multi-unit housing projects. This is an evolution that has negative consequences for both the cost of construction, and the ability to maintain a small, familiar, residential atmosphere.

See **Table 8: Building Code Conformance & Building Permit Approvals**, following page.

A Building Code Example

One occupancy definition in the British Columbia Building Code (BCBC) (Feb. 1994) is the boarding house or rooming house. These are not specifically defined in the BCBC, however they are included in the definition of a *suite*, and so are treated similarly to separate *dwelling units* in most respects.

A *dwelling unit* in the BCBC is defined as: "a *suite* operated as a housekeeping unit, used or intended to be used as a domicile by one or more persons and usually containing cooking, eating, living , sleeping and sanitary facilities." A *suite* is defined as: "a single room or series of rooms of complementary use, operated under a single tenancy, and includes *dwelling units*, individual guest rooms in motels, hotels, boarding houses, rooming houses and dormitories as well as individual stores and individual or complementary rooms for *business and personal services* occupancies."

TABLE 8: BUILDING CODE CONFORMANCE & BUILDING PERMIT APPROVALS

	PROJECT A	PROJECT B	PROJECT C	PROJECT D	PROJECT E	PROJECT F	PROJECT G	PROJECT H	PROJECT I	PROJECT J	PROJECT K	PROJECT L	PROJECT M	PROJECT N	PROJECT O	PROJECT P	PROJECT Q	PROJECT R	PROJECT S	PROJECT T	PROJECT U	PROJECT V	TOTAL #
Variance/Easement required			√								√	√											3
Design changes required	√		√			√				√	√					?							5
Fire safety concerns - sprinklers			√		√		√	√					√			√							6
Date DP/DVP acquired		12/89			09/95	05/92			8/91		11/95		1/95		11/95								
Date BP acquired	1/87	11/90	5/94		10/95	9/92		1/23	8/91	1/91	12/95	11/87	6/95	7/95		2/91	8/89	11/95					

The main consequences of using the multi-unit occupancy interpretation include: required fire-rated separations between resident rooms, which are viewed as *suites* or separate *dwelling units*, and to common circulation areas, and fire exiting requirements conforming to multi-unit standards. With regard to the separation of residential suites, Sentence 9.10.9.14.(2) of the BCBC reads: "Sleeping rooms in boarding and lodging houses where sleeping accommodation is provided for not more than 8 boarders or lodgers need not be separated from the remainder of the floor area as required in Sentence (1) where the sleeping rooms form part of the proprietor's residence and do not contain cooking facilities. This definition, therefore, can not be applied in group home projects with greater than eight resident rooms, or where cooking facilities are provided in resident rooms. The alternative is to develop multi-family projects and include the required fire separations. While individual cooking facilities can affect the occupancy definition, the provision of private ensuite powder rooms or baths is strictly a cost and marketing decision. The exceptions to this rule include projects that chose, because of cost, time or space constraints, to limit the number of residents to fit within the allowances of a "group home" definition in a local zoning by-law, such that the design and construction were permitted to conform to typical single-family home standards. The number of residents permitted under this type of regulation varies, but tends to be in the range of 4 to 6 instead of the typical range of from 8 to 12. This allowance is by no means universal, but did exist in a number of the case study municipalities, though was used in only a few cases. For the majority of the case studies, the projects were not economically viable with so few residents because of the costs of staffing and overhead. On the contrary, for some groups, as many as twenty residents were necessary to be viable, generating the double-house schemes.

One provincially funded house was permitted by the province to be built of combustible construction, but the city required non-combustible construction. The house was thus disadvantaged by a combination of the most stringent requirements from both jurisdictions.

Group Homes versus Licensed Care Facilities

The BCBC Section 9.10.2 discusses other Occupancy Classifications. Two special uses are classified as residential occupancies in addition to more typical single and multiple unit residential buildings, such as apartments, condominiums, duplexes and single family homes. These include: Custodial and Convalescent Homes (9.10.2.2.) which permits "Children's custodial homes and convalescent homes for ambulatory occupants living as a single housekeeping unit in a *dwelling unit* with sleeping accommodation for not more than 10 persons..." and Community Care Facilities (9.10.2.5.(1) which permits "A Community Care Facility licensed for residential use under the Community Care Facility Act [of B.C.] ... provided:

(a) occupants live as a single housekeeping unit* in a dwelling unit with sleeping accommodation for not more than 10 persons,
(b) not more than 6 of these persons are in care, and
(c) the facility is equipped with
   (i) interconnected *smoke alarms* conforming to CAN/ULC-S531 "Standard for Smoke Alarms, " installed in each bedroom,
   (ii) a sprinkler system installed in conformance with NFPA 13D, "Standard for the Installation of Sprinkler Systems in One and Two-Family Dwellings and Mobile Homes," with additional sprinklers in all washrooms and a testing program in place that has been approved by the local fire authority,
   (iii) a 3/4 hr *fire separation* between an attached garage and the dwelling, and
   (iv) an emergency lighting system conforming to Article 9.9.11.2,..."

• this is usually interpreted to mean that the residents share a single cooking and eating facility.

While the majority of the case studies are not defined as community care facilities, those implemented under the Residential Care Facility Program in the Winnipeg region are licensed, and do provide more care, for which operators must be trained. The residents themselves, however, are not a fundamentally different group of seniors than those living in the Abbeyfield or other group home projects across the country. They too are generally required to be mobile and continent. This fact is very important because, during the course of many group home interviews and tours, the issue of maintaining frail residents as their health declined and mobility decreased was a growing concern.

The Abbeyfield Society of the UK also faced this dilemma after operating the standard houses for several years. This type of supportive environment did indeed seem to maintain independence, but though serious illness and decline were avoided, frailty did increase as residents aged in place. Eventually, the UK Abbeyfield organization developed what they call Abbeyfield Extra Care, which is essentially a Care Home or Nursing Facility. Several purpose-built facilities now exist in the UK.

Here in Canada, the typical Abbeyfield or other supportive group home resident has gotten older and frailer upon admission, as changing attitudes and the increased availability of home support services has kept people in their private homes longer before moving into supportive housing settings. As a consequence, the operators of these houses face the difficult dilemma of denying admission to residents that are already beyond the acceptable admission criteria, or discharging those that deteriorate after making the group home their own. This challenge is faced in an environment where provincial health care funding is scarce, and there are usually long waiting lists for admission to licensed nursing homes. It also goes against the goal of providing a supportive and secure residence for seniors which, ideally, they will never be forced to leave.

It is important that sponsors and operators have a clear understanding of their goals and mandate with regard to their clients. Many groups avoid the more stringent and costly building code requirements for licensed care homes, and later find themselves unable to adapt to the changing needs of their residents. If this is a clear policy then operators must be prepared to move their residents into higher levels of care. On the other hand, if the future role of the project is uncertain, or will perhaps change to provide greater care, the addition of fire separations, sprinklers, smoke alarms and emergency lighting should be considered when the project is initially developed. Some project sponsors did, in fact, include many of these features though they were not required, along with concern for accessibility and environmental supports to facilitate decreased strength and mobility. In addition, the exiting requirements, and those for sprinklers and emergency lighting for multi-unit projects are similar to those outlined above for licensed care facilities, though the number of residents may exceed six.

None of these building types and uses are required to conform to Section 3.7 of the B.C. or National building codes pertaining to handicap accessibility, but many project owners voluntarily chose to increase the accessibility of the projects to accommodate decreased mobility in the residents. Section 3.7 of the building code can be effectively used as a design guide in these instances, though wheelchair access sometimes conflicts with the needs of frail, ambulatory elderly residents. The issue of ambulation, however, can interfere with the ongoing use of the Convalescent Home occupancy, where this was the chosen category.

Although there is always room for interpretation and disagreement in matters of building code, the range of interpretations was relatively narrow. Some architects and clients pushed harder at the boundaries of what was acceptable in order to improve the quality or character of the finished product. Many concessions were made where older or heritage buildings were re-used since it was difficult or impossible to build to the letter of the code. Furthermore, the codes allow for certain relaxations. Many projects were over-built in terms of strict code requirements because the sponsors were concerned for resident safety, comfort, accessibility and independence. The short and long term requirements of the building codes for given occupancy definitions can not be determined in isolation from the Zoning By-laws and associated permitted land uses. Even if the building itself is adaptable, proprietors must be confident that their land use zone would also permit a higher use, or the necessary rezoning could later occur.

8.) Construction Timing and Process

A comparison of the duration of construction for the case studies which are completed, or nearly completed, reveals relatively little variation in the overall timing. The most common duration from construction start to substantial completion is in the neighbourhood of seven to eight months. Of a total of 17 completed or nearly completed projects, six were completed in this period of time. A further five projects took a total of between 11 and 15 months. An examination of the project characteristics and circumstances does not entirely explain this variation.

For example, it might be assumed that the "double" or "multiple" houses, if built contiguously, would have taken longer than a typical single house. While only one double house was built this way, it is not representative of a normal construction period. There were some delays in the construction process due to errors on the part of the contractor which required correction, setting the timing back by several months. The architect felt that this project should have taken only eight months instead of 15, which would have brought it into line with the first category of projects. Each other instance of double or multiple houses was again a different situation. In these cases, only one house, or the first phase was built at one time. In one case, the duration was seven months, in another, 11 and in the third, 15 months to build the first of eight houses. In all three of these cases, additional site work was required due to the anticipated future phases, and yet no pattern can be seen.

Furthermore, of the projects taking approximately seven months to complete, two experienced unanticipated delays, such as discovering bedrock while digging foundations, and a roof that required replacing when this scope of work was not planned. Perhaps these problems had a greater impact on budget than on schedule. Some of the projects taking approximately a year or more experienced no significant delays or problems during the construction process to explain this longer timeframe. Although it might be the ideal to complete construction of a group home in seven or eight months time, it is probably fair to say that anywhere from seven to 12 can be considered within the typical range.

See **Table 9: Construction Timing and Process,** following page.

Two other kinds of situations exist among the case study projects. The first are the projects which undertook relatively minor renovations to existing buildings, sometimes incorporating small additions as well. There were two such projects, and the period of construction was from two to four months in duration. One of these later undertook three further phases of small additions and renovations, and each of which was completed in about four weeks.

Finally, one project group used primarily volunteer labour to construct the house, drawn from the church congregation affiliated with the project. As a result, the total construction period was four years long. While this is obviously an anomaly, two of the projects currently under development intend to utilize some volunteer labour as well. Though this is a creative and innovative means of financing a non-profit housing project, groups attempting this construction method should keep in mind the possible consequences. Contractors and project managers have a contractual obligation to complete the work within a specified timeframe. Volunteers labourers are under no such obligation.

TABLE 9: CONSTRUCTION TIMING & PROCESS

	PROJECT A	PROJECT B	PROJECT C	PROJECT D	PROJECT E	PROJECT F	PROJECT G	PROJECT H	PROJECT I	PROJECT J	PROJECT K	PROJECT L	PROJECT M	PROJECT N	PROJECT O	PROJECT P	PROJECT Q	PROJECT R	PROJECT S	PROJECT T	PROJECT U	PROJECT V	TOTAL #
Type of Tender Used																							
Open Tender							√		√					√									3
Invited Tender	√		√					√							√	√	√						6
Negotiated Contract or Self-Managed		√			√	√				√			√										4
Construction management												√		√		√			√				4
Construction Process																							
Construction begun	01/87	12/87	08/89		05/90	02/91	07/91	12/91	05/92	10/92		06/94	10/90	01/95	08/95	10/95	05/96	09/96	?	10/96	?	?	
Construction completed	12/87	01/88	11/89	07/90	08/90	12/91	03/92	06/92	08/93	01/94	03/94	12/94	10/94	07/95	02/96	08/96	11/96						
Duration of Construction (in months)	12	2	4		4	11	8	7	15	15		7	48	7	7	11	7	?	?	?	?	?	
Completed on schedule	√		√		√																		3
Delays/Extras		√							√					√									3
Over budget							√		√			√	√	√									5

Aside from the unexpected and unavoidable delays mentioned above, few projects had any difficulties with their chosen contractors. The method of assigning the contract varied between: projects managed by groups with construction expertise, whether profit or non-profit, contracts that were negotiated with one familiar contractor, and those determined through either an open or an invited tendering process. As well, a few projects chose the construction management approach rather than a standard contract with a general contractor. Projects associated with provincial housing programs or municipal housing departments were obligated, not only to use an open tendering process, but to accept the lowest bidder. Two of these had some difficulties with the contractor. Errors were made, or deficiencies abandoned, with differing outcomes depending on the contract administration style. These contractors, though reasonably competent, demonstrated a lack of professionalism when difficulties arose. Part of the difficulty here arises from the tenuous position both contractor, consultant and client are placed in when an unreasonably low bid is accepted. Contractors sometimes become desperate when they realize that they will not make a profit, or even lose money on the project, and are tempted to cut corners or abandon responsibility.

Although there is nothing about a group home that requires specific construction expertise, or necessarily a certain size of company, an invited bid narrows the prospects to a few contractors whose skill, experience, and professionalism have been examined and demonstrated. Engaging a contractor who is "a friend" can be equally dangerous, unless the contractors ability and responsibility are well known. While provinces and municipalities have an obligation to spend taxpayers' money responsibly and ethically, pressing contractors to bid too competitively and not allowing a contingency for reasonable extras and unknowns can cause more problems than it contains. Developer groups are encouraged to obtain competitive bids, but to keep in mind the real cost of building buildings, and to leave the contractor room to provide both good service and a quality product. Qualified and experienced consultants can be important advisors in this regard.

In general, the level of satisfaction with the construction process was highest among those groups who individually selected a project manager, or had the expertise to manage the project themselves. The level of satisfaction was consistently high, as well, among those who had invited a selected few contractors to bid on the project. Among those groups who conducted an open tender, two were less than satisfied, and both of these were compelled to select the lowest bidder. It would appear that the level of satisfaction is proportional to the degree of control an owner or sponsor maintains over the project's execution. This, however, would be dependent on the owner or sponsor also ensuring that it possessed the expertise to exercise this control effectively. For non-profit societies with little or no construction or development experience, recruiting a board member with the necessary skills and knowledge early in the process is perhaps the best insurance that informed decisions will be made at every step. Alternatively, hiring a development consultant or other advisor can be useful, although with a necessary cost. This investment, however, is a good one given the risks associated with the development process, and the cost of making mistakes.

9.) Comparison of Construction Costs

Table 10: Comparison of Construction Costs (see following page) shows a summary of the total project budgets (including land, buildings, construction, fees, etc.) for the case studies included in the study, averaged for each year of construction, and then adjusted for inflation at 2% per year to 1996 dollars. A further breakdown shows the land purchase price, a total of all fees and development expenses, including consultants, marketing, surveys, etc., and the actual construction budget. It is difficult to learn a great deal from this breakdown, as several projects had virtually no land cost because of token or subsidized leases, and purchased land prices varied from place to place. In addition, this amount includes both land and existing building price in some cases and not in others. However, it does give some indication of the order of magnitude of property purchase prices.

The total project budget figures are also difficult to draw conclusions from in this context, since the projects varied greatly in size and quality of construction, and furthermore by location in both the country, and between urban and rural locations. One measure of relative project cost, all variables included, is the per unit cost.

TABLE 10: COMPARISON OF CONSTRUCTION COSTS

Year	$ Total Budge	Adjusted	$Land Cost	Fees & Expense	$ Construction Cost	$/unit	Adjusted	$/s.f.	Adjusted
1987	$360,000	$430,233.32	$65,920	$22,000	$272,080	$40,000	$47,803.70	$ 49.63	$59.31
1988	$480,000	$562,396.50	$140,000	$4,000	$300,000	$62,857	$73,646.99	$ 110.24	$129.16
1989	$326,962	$375,576.56	$181,706	$45,000	$102,729	$65,392	$75,114.85		$0.00
1990	$350,000	$394,156.85	$48,500	$30,750	$270,750	$47,917	$53,961.76		$0.00
1991	$850,000	$938,468.68	$125,000	$17,000	$708,000	$70,833	$78,205.36	$ 94.52	$104.36
1992	$902,000	$976,353.81	$112,688	$37,800	$420,000	$98,334	$106,439.34	$ 146.06	$158.09
1993	$993,135	$1,053,922.28	$63,000	$78,000	$366,000	$65,191	$69,181.21	$ 141.77	$150.45
1994	$694,000	$722,037.60	$50	$51,000	$653,000	$87,336	$90,863.85	$ 144.50	$150.33
1995	$510,000	$520,200.00	$122,688	$37,025	$387,500	$56,667	$57,799.83	$ 75.40	$76.90
1996	$715,325	$715,325.00	$162,500	$40,867	$407,900	$75,152	$75,151.50	$ 100.29	$100.29
1997	$712,500	$698,529.41	$162,500	$45,000	$505,000	$71,250	$69,852.94	$ 142.48	$139.69

See **Table 11: Per Unit Construction Costs (1996$) by Community Size**, following page.

These figures represent the total project budget figures divided by the number of units in each project, and again averaged for each construction year and adjusted to inflation. (The number of units was assumed to be the number of rooms, studios or apartments intended for elderly residents, not including the housekeepers suite and relief staff or guest room, as these are assumed to be more or less constant, and are not revenue generating.) The resulting figures range from a low of $37,538.37 per unit to a high of $140,716 per unit in 1996 dollars. The mean figure for metropolitan areas is $87,512, and the median $79,007, for Urban areas the mean is $70,243 and the median $65,724, for smaller towns the mean is $63,444 and the median 65,428, and for rural communities both the mean and median are $66,978. There appears to be no significant difference between small towns and rural areas, though a small upward trend is apparent, the larger the centre. This fact is reflected in the experience of those groups developing projects in larger, metropolitan centres, where it was much more difficult to establish project feasibility, and all of the double-houses were developed.

The mean per unit cost overall is $74,081 and the median overall is $71, 082, all in 1996 dollars. Examined this way, the variations by region and over time are averaged, and a benchmark is established for a per unit project cost in the mid 70's. Likewise, in order to account for the great variation in space standards, both in unit size and in the amount and range of common spaces, a per square foot amount has been calculated (not shown in Table 11). This reveals a range from a low of $59.31/sq. ft. to a high of $230.56/sq. ft. , with no pattern over time, with figures adjusted to 1996 dollars. The very high extremes can be explained through specific circumstances, and have to do with required construction systems or desired quality of finish. In contrast, the low extremes (which are not simply renovation costs) are more likely due to competitive contract prices that were very effectively and efficiently managed by the contractors and architects. There is no strong pattern between smaller and larger communities, though some of the highest figures do represent the some of the largest metropolitan locations. Prices in the middle range were as likely to be in small towns as in metropolitan suburbs. The average of the adjusted per square foot costs for the 22 case studies is $118.77 and the mean value is $129.16, both of which are reasonable per square foot construction prices for residential construction in 1996.

One final comparison is made between those projects funded by the government under an established provincial housing program, and those developed by private non-profit or for-profit sponsors. This calculation (also not shown in Table 11) reveals an average per unit cost for the publicly funded projects of $76,663 with a range of $47,755 to $140,716. The private, non-profit projects ranged in price from $57,326 to a high of $90,608, with a mean of $75,425. The private, for-profit projects ranged from $37,539 to $124,402, with a mean of $80,970. Again, all of these per unit costs have been adjusted for inflation and are expressed in 1996 dollars. There does not appear to be a real trend here, since both the more expensive and the less expensive projects are distributed between all three categories.

TABLE 11: PER UNIT CONSTRUCTION COSTS (1996$) BY COMMUNITY SIZE

	Metropolitan	City	Town	Rural	Overall
Per Unit Cost	$72,163	$73,647	$47,804	$66,978	
	$140,716	$37,539	$75,115	$47,755	
	$90,608	$78,205	$57,326	$70,385	
	$65,733	$124,402	$73,529		
	$70,000	$57,800			
	$85,850	$49,867			
		$66,176			
Average	$87,512	$70,243	$63,444	$61,706	$72,695
Median	$79,007	$65,724	$65,428	$66,978	$70,000

After Development

10.) Staff Hiring & Remuneration

Amongst the Abbeyfield and related group home case studies, the job descriptions for the house staff are very similar overall. The following discussion of hiring criteria, procedures, qualifications and candidates is generalized across most of the 22 case studies because the issues were very similar across the board, and practices and opinions also comparable. No patterns or significant differences were observed in these practices across project types, and specific problems with staff appeared to bear no relationship to hiring criteria or practices, or project type, but rather to occasional legal or personal issues.

The earliest Canadian Abbeyfield projects, opened in 1987 and 1988, had little advice and no precedents available to assist the sponsors in dealing with this issue. Some of these groups looked to the British Abbeyfield organization for guidelines, others set out to determine their own standards and procedures. These groups, as with a few later ones, referred to provincial employment and labour standards and remuneration rates, including benefits, to assist them with determining appropriate levels.

The earliest projects helped to develop guidelines for Canadian Abbeyfield houses which have been widely used, even by some non-Abbeyfield affiliated projects, and helped to take the guesswork out of this stage for subsequent projects. These Abbeyfield documents (St. Andrew's Abbeyfield Manual of Policy and Procedures, 1991) advise that the house parent's role, in addition to shopping, cooking, cleaning, house management, record-keeping and emergency procedures, is to:

- assist new residents in becoming familiar with their surroundings and the house routine;
- check on the well-being of residents and be aware of their general health and condition every day;
- foster a family atmosphere in the home and take an interest in each resident;
- stimulate the residents' interest in the home and the community.

Another brochure, "The Abbeyfield Housekeeper", says, "The unwritten part of the housekeeper's duties is the way in which she befriends, looks after and cares for the residents with the help of the House Committee of voluntary workers." Later Abbeyfield and other projects refer specifically to advice and influence received from other Abbeyfield projects, particularly neighbouring ones, and to these Abbeyfield guidelines.

Some of the criteria mentioned most often included: familiarity or sensitivity in working with the elderly, domestic skills, the right personality and to a much lesser degree, experience with long term care or nursing. The personality or character of the potential candidates was considered one of the most important criterion, along with a willingness to live in-residence. Several candidates did come forward with previous experience in long term care nursing or other work with the elderly, but many simply had experience running households, and caring for their own families.

In only one case study (Project V, See **Table 12: Staff Hiring Practices**, following page), which was representative of a municipal/provincial program for residential care facilities, was specific training required. In this instance, which was an owner-operated group home, the operators were either self-selected or recruited by a regional coordinator. They were then required to complete a basic training course, as well as training in medication administration, CPR, emergency first aid and related health workshops and seminars.

Although first aid training or nursing experience were considered assets in the Abbeyfield projects, they were not required skills. "The Abbeyfield Housekeeper" goes on to outline that, "An Abbeyfield house does not offer nursing care. The residents, though elderly, are active and able to look after themselves, and the housekeeper is not called upon for nursing attention beyond what would be given in an ordinary family for occasional indisposition." This difference is clearly a reflection of the different mandates of these two types of group homes. On the one hand, the group home is a licensed care facility, and on the other, there is a specific policy precluding the delivery of personal or health care services. This latter policy is directly related to the lack of licensing, and the liability associated with this designation.

Almost all of the case studies project currently in operation advertised for the available staff positions, both full-time house-keeper, -manager or -mother, as they are variously titled, and the relief position[s]. It was not an uncommon experience to receive applications from a fairly large number of interested candidates. This number ranged from about ten to twenty or more per house. In six cases the applicants, though abundant, were generally unsuitable. Reasons for unsuitability ranged from an unwillingness to live-in, a lack of appropriate skills, including communication skills, and most importantly the "right" personality and attitude, as deemed by the board members.

Some of this inefficiency may be due to lack of specificity in the wording of the advertisements, but it is also clear that the criteria are themselves vague and perhaps difficult to make explicit. Usually the house management committee or a sub-committee was responsible for interviews and hiring. The private for-profit or equity projects operated in very similar ways, although the hiring of staff was handled by staff instead of volunteer committees. Subjective selection criteria were often applied during interviews, since personal traits are difficult to ascertain from application forms.

TABLE 12: STAFF HIRING PRACTICES

	PROJECT A	PROJECT B	PROJECT C	PROJECT D	PROJECT E	PROJECT F	PROJECT G	PROJECT H	PROJECT I	PROJECT J	PROJECT K	PROJECT L	PROJECT M	PROJECT N	PROJECT O	PROJECT P	PROJECT Q	PROJECT R
House manager resident	√	√	√		√	√	√	√	√	√		√	√	√	√			
Relief staff	√	√	√			√	√	√	√			√	√	√	√	√		
Positions advertised	√	√	√	√			√	√	√		√	√	√	√	√			
Follows Abbeyfield guidelines		√							√			√				√		
Established own guidelines	√																	
Advice or influence from other projects		√	√			√						√		√				
Provincial Employment benefits/rates/standards	√	√						√										
Experience with seniors/nursing/Long Term Care			√				√						√					
Training required					√											√		
Many unsuitable applicants	√					√		√	√				√	√				
Owner/operator					√													
House set up prior to opening	√	√	√			√	√	√	√			√		√				
Replacements since opening	√							√	√									

"The Abbeyfield Housekeeper" advises: "The housekeeper is an absolutely key figure in the success and happiness of the operation of an Abbeyfield house...The right sort of housekeeper makes the house very much her own, and her personality gently influences the whole." Although these criteria varied, it was often stated that a kind of maternal warmth and sensitivity combined with strength of character and rigour in the management and organization of the household - including the residents - was required. One sponsoring member's favourite way of describing this ideal personality was as both "a saint and a sergeant major." This combination of attributes was informally observed in many instances during house tours and visits. It has been observed that the housekeeper plays a key role in ensuring the happiness and well-being of the residents through the provision of a well-maintained home, nutritious meals and caring environment. It has also been stated that the social, intellectual and spiritual nourishment of residents are as important as bodily nourishment. These descriptions give some indication of the complexity and responsibility that this position entails.

Successful candidates, though most often middle-aged women, were also sometimes younger, and sometimes, though not often, men. It is possible that the range of candidates who applied for both the full-time and part-time relief positions was limited to those who did not have obligations to either home or family. Many of the housekeepers are, in fact, widowed or divorced women with grown children, and a few young singles. Occasionally, a married couple, or a single woman with school aged children was hired. The key is that their personal circumstances accommodate the residency requirement. Despite the odd mix of qualifications and personal circumstances, the abundance of applicants indicates that there is no lack of interest in this kind of position.

Presumably familiarity or previous experience with an Abbeyfield house or group home for the elderly would be a desirable qualification, but not one of the case studies' housekeeper/managers possessed this experience. This is most likely due to the lack of precedent projects, and therefore employment opportunities. Once people have experience with this kind of work, they appear to be interested in maintaining it. One housekeeper expressed the desire to move to another city, and was curious to know where other Abbeyfield houses existed or were soon to be operating.

One criticism of the house manager's role has been that the degree of authority and autonomy given the housekeeper in the running of the household can lend the group home a paternalistic (maternalistic?) atmosphere, which does not necessarily support autonomy, dignity and independence in the residents. The housekeeper's character often establishes the personality of the house itself, and as one written job description states, the duties of the housekeeper include: "assisting with the development of a positive living environment which respects the need for individuals who are of senior age to maintain control over the major decisions affecting their lives, yet preserves harmonious relationships necessary in a communal setting." Yet without this specific mandate and policy, an efficient and organized housekeeper may establish a household that serves their own needs above those of the senior residents for whom the house was created.

One professional health care consultant observed that the way the house is run should reflect the values and philosophy of the sponsor, and not of the individual housekeeper. Such practices as residents not being permitted into the kitchen, as established by some housekeepers, and an abundance of other "house rules," which affect the living environment of the seniors in a negative way, can be controlled by clear policies and guidelines as set by the sponsor, if they are clear themselves about their goals and mandate. Sensitivity, experience and exposure to working with the elderly are important factors. Appreciating the needs of the elderly can preclude insensitivity in the managing of the household, such as applying numbers to resident doors, and the selection of artwork and decorating items without consulting the residents, which contribute to the anonymity and impersonal nature of the house. Issues of choice and residents rights are difficult policy decisions that not all sponsors have addressed fully. A clear philosophy can significantly influence the operation of the house, and this is an important factor in establishing the suitability of potential staff members, who must subscribe to this philosophy in order to effectively practice it.

One final issue regarding employees concerns labour laws that may apply. Difficulties experienced by one or two house sponsors with dismissing inappropriate staff have proved a lesson for other groups. The difficulties arise out of the method of remuneration for the resident house managers. It is usual that these employees received a salary in addition to the cost of their room and board. Initially it was not made clear in the employment agreement or contract that the room and board were part of the remuneration, and would need to be terminated when employment ceased. It happened that one employee was let go for inappropriate behavior, and the sponsor then discovered that this person intended to stay on as resident of the house. The landlord-tenant laws appeared to support this former employees rights as a tenant. Only after involving lawyers and engaging in some difficult negotiations was this matter resolved. Subsequently, the employee contract was made very explicit on the relationship between employment and residency in the house, and reviewed carefully by the sponsor's lawyers. This sponsor now strongly urges others to take the same precautions when setting up the resident house manager's contract.

11.) Resident Selection and Admission Criteria

As discussed above, needs assessment surveys were completed in eleven of the 22 case studies which resulted in demonstration of local interest and need for the type of housing proposed (See **Table 13: Summary of Criteria and Methods for Resident Selection,** following page.) Other cases were simply familiar with the local population and the amount and type of housing available. Demand was also inferred from the waiting lists of other, nearby projects. When it came time to recruit residents for the completed houses, many of those who had conducted local surveys, or had accumulated lists of prospective residents through open houses, public meetings and inquiries over the months and years of planning and development, were able to contact these individuals again to invite them to move in, or to tour the house and be interviewed.

TABLE 13: SUMMARY OF CRITERIA AND METHODS FOR RESIDENT SELECTION

	PROJECT A	PROJECT B	PROJECT C	PROJECT D	PROJECT E	PROJECT F	PROJECT G	PROJECT H	PROJECT I	PROJECT J	PROJECT K	PROJECT L	PROJECT M	PROJECT N	PROJECT O	PROJECT P	PROJECT Q	PROJECT R	PROJECT S	PROJECT T	PROJECT U	PROJECT V	TOTAL #
Needs assessment survey conducted	√		√	√			√	√			√	√		√	√				√	√	√		12
Residents drawn from local community/church				√	√		√						√										4
Community broadcasts/ads placed		√	√				√	√				√		√	√								7
Residents identified through referrals	√	√	√	√	√	√	√		√		√	√							√				11
Standard Abbeyfield criteria used	√						√		√									√	√				5
Low income a criterion	√		√	√		√	√		√		√												7
Compatability a criteria																							0
Criteria include mobility & continence	√	√	√	√	√	√	√	√			√	√		√	√								12

An almost universal observation by the house committees responsible for resident selection was that waiting lists were of very little use with this resident population. In the majority of cases, when a person who had previously expressed interest or need was later contacted, their circumstances, or sometimes their mind had changed. Those that had been in need of supportive housing had inevitably found another option, and already moved during the intervening period. Often those that had expressed interest in principle, when contacted, declined the opportunity, remarking that they "were not ready yet".

There are two interesting and related phenomena at work here. In the first instance, the frail elderly that have expressed or acknowledge a need for a more supportive living environment, or been pressed into a move by their caregiver children, need such support immediately. The few months or even years during which a project is being developed are much too long a period for these frail individuals to wait. In fact, they were as likely to have deteriorated more sharply in health and mobility, as they were to have located a suitable alternative supportive living situation. In many cases, they were now living in licensed care facilities.

This was also true in the cooperative and other equity situations. The co-op in particular required not only sustained interest, but also real commitment in terms of time, energy and finances. Only a very few energetic and motivated members stayed with the project for the duration. This lack of commitment was the primary reason the co-op scheme had to be abandoned in favour of a typical rental Abbeyfield. The CMHC insured mortgage required down-payments for 8 out of the 10 planned units. It is hypothesized that the co-op style of Abbeyfield is entirely feasible and would even be popular, if the financing of the project could be managed without the commitment of the actual group of senior residents. If a non-profit or for-profit housing developer could develop and finance the project with commitment from a few enthusiastic potential residents, it would be much easier to locate 10 interested seniors with sufficient capital to repay the developer's investment, when the project was complete.

In a similar situation, a group of seniors who were self-organized and developing a small strata-title project for themselves, with self-contained units and some shared facilities, found that it was not easy to complete the development process without conflicts and casualties. The first project attempted, with only four units, and four couples involved, was completed and lived in successfully for several years. When members of the same group attempted to develop an eight unit project nearby, it was much more difficult to find and retain sufficient interested partners. Incompatibilities between group members caused enourmous difficulties and the original members eventually left the group. It is this experience, in part, that led a private developer to build a cluster of strata-titled shared houses to be sold on the market. The result: - adequate pre-sales for construction of eight, 10-unit houses, demonstrates that there is abundant interest in this lifestyle option after the development work is complete.

The second situation is the corollary of the first. The elderly that are "not ready yet" are still healthy and relatively active and independent, though they may be in their seventies or eighties. Under such circumstances, they often see no reason to compromise their privacy and independence, or to leave their familiar private home. There appears to be little recognition that the purpose of supportive housing is to remove some of the burden and risk of independent living in order to prolong good health and independence. Another important role that supportive housing plays is that it accommodates a more gradual decline in vigour and also convalescence from minor health setbacks that might otherwise lead to institutionalization, and a greater loss of independence. Without these supports this group of healthy active elderly may find themselves skipping over the supportive housing stage altogether. Not all seniors have the foresight to plan ahead for frailty, and of course not all seniors will age gradually in the first place, rather succumbing to a sudden decline in health.

These are two of the variables that determine suitability for a supportive group home situation, along with the importance of being able to tolerate a group living situation, which some are not. Other criteria, which are those expressed by the sponsors responsible for selecting residents, include independent mobility or ambulation, continence, and often, whether it is stated or not, compatibility with others in the group. The majority of the case studies projects required residents to be both ambulatory and virtually all required continence (refer again to Table 13.) Some projects, including some Abbeyfield projects, were less firm about mobility, especially those that had newer houses which had been built with lifts or elevators and wheelchair access. They had recognized the tendency for their residents to be admitted older and frailer than was historically the case in Abbeyfield houses, particularly in the UK. This is an important recognition of the differences between the UK and Canada, and of the changing times. Seniors here and now are less likely to accept support in a shared setting unless they are really in need.

While the value of companionship and care are apparent once residents move in to group homes, loneliness is usually not the reason most choose this option. This is demonstrated by reports of new residents as reluctant participants in the "family" atmosphere. Many of the less gregarious seniors who move into Abbeyfield and other group homes keep to themselves and their rooms a great deal, especially in their first few months or years of residency. Later, the companionship and sense of belonging to the group are much more evident.

Although it was not often stated that these residents were to be drawn from the local area, it is assumed that many were, simply because of the preference of people to remain in their familiar neighbourhoods. In smaller communities, this is even more likely, and less remarkable. It was noted that in the larger, metropolitan areas, some residents tended to have moved from further away. In a few instances, seniors moved to be nearer their adult children, or were moved by their adult children to be nearer them. One woman moved out again because she was unhappy with the unfamiliar area, and was homesick for her neighbourhood and friends. She later returned however, because after going back she realized she had given up a preferable lifestyle choice.

Once filled, several houses maintained a waiting list of potential residents for when a vacancy came open, while acknowledging that it would not likely generate residents. These kinds of waiting lists assembled through surveys should be considered an expression of need generally, but are unlikely to provide the actual residents who move in. The alternative to which many groups have turned for recruiting potential residents is through referrals from a variety of agencies in the community. Particularly once the house is established in the community, good relationships with a network of agencies serving seniors' was able to generate potential and suitable residents on very short notice. Examples of the kind of agencies which refer residents include the VON (Victorian Order of Nurses), local home-support agencies, seniors centres and day-care, non-profit housing agencies, and local doctors and clinics.

Regardless of where residents are found, several of the Abbeyfield projects also involve either a physician on the admissions committee, or require signed approval from the attending physician of the applicant. This is intended to provide the selection committee with an assessment of relative need, but is also intended to screen residents for undesirable or unmanageable conditions, such as terminal illness, dementia, incontinence and physical ailments beyond the scope of home care and minor assistance from the house manager. Some houses have had very difficult situations with residents who were ill in a variety of ways, and once in the house could not be relocated, consequently disrupting the routine for all the others, and placing undue burden on the house mother. Many sponsors now require applicants to have a sponsor, someone who can be consulted, and will be responsible for the senior in case of emergency or the necessity of a move.

There remain strong differences of opinion about the appropriateness of a physician's approval, both from the standpoint of ethics and of effectiveness. One consultant to the industry remarked that giving a physician too much say over admissions places an excessive emphasis on the physical attributes and needs of the residents, and not enough on the social or psychological needs. Rather than placing so much emphasis on the medical model, it has been suggested that admissions to Abbeyfield and other supportive group homes should be coordinated with local or provincial long term care assessment. The committee responsible for the resident selection and ongoing management of the house should themselves be caregivers, or people connected to community services such as home care nursing, day care, etc. Abbeyfield houses, and other supportive group homes for seniors should be seen in the context of the housing and care continuum, and those responsible for them should be clear about what services they provide within this larger framework. Establishing a philosophy or mission can help organizing sponsors focus and establish clear operating policies. In addition to the pragmatic issues around care-giving, admissions, and discharge policies, there are difficult decisions that must be made about residents' choices and rights.

Many house committees, after establishing potential residents suitability according to several objective criteria, then interviewed these applicants to determine their compatibility with the group. This is more difficult to do at the initial set-up of a house, since these judgments are more superficial, then when a new resident is being added to an established household. Often, the house manager/mother is involved in these interviews, since it is assumed s/he is most familiar with the group and its character.

Other groups accepted residents on a first come first served basis once age and income criteria had been met. In the case of some houses developed under specific provincial programs, residents were referred or assigned from a regional coordinator, who was connected with the local or regional long term care and community care systems. The criteria, therefore, were established by these organizations, and not by the individual group home owners, operators or managers. One possible difficulty with this hands-off method, though this was not confirmed, is the possibility that not enough attention is paid to the compatibility of the group of individuals being co-housed.

Low income was another criterion added to this long list, in the case of several case studies which were funded under provincial programs. In Ontario and Quebec, in addition to funding for the capital cost of developing projects, some houses received ongoing subsidies from ministries of health and social services to offset the cost of the house manager and supportive services provided. In some cases, rental subsidies were applied for by individual tenants through programs such as SAFER (Shelter Aid for Elderly Residents) though this is applied only towards the shelter component. In two of the case studies, subsidized units were made available through funds donated from private sources. The majority of the case studies projects, however, had no subsidized units or tenants, and operated on a cost basis. This will be covered in more detail in the Operating Costs section below.

12.) Project Capacity, Occupancy Rates and Ongoing Demand

Of the fifteen case studies projects which were in operation at the time of data collection, nine were fully occupied, and the remaining six were not. Of these the number of vacancies ranged from one to three, except for one project which had seven vacancies. Those with vacancies were not all new projects, but many were still attempting to fill their houses for the first time. Overall, of those projects that were fully occupied, or had previously been so, the length of time taken to find sufficient residents to fill the house ranged from only two weeks or less, where a full complement of residents were signed up and committed at opening time, to a maximum of 12 months or more. Many, however, stated that their houses had been fully occupied in three to six months, the most common experience being four months. Sponsors and owners should be aware of this lag, during which operating costs must be covered out of other sources of revenue than rent payments. Often capital funding does not remain in place once occupancy of the building has been achieved, and therefore the sponsor or owner becomes responsible for monthly operating and mortgage payments.

See **Table 14: Project Capacity, Occupancy Rates & Demand,** following page.

Two older projects which had previously been full were having difficulty locating replacement residents, and the number of vacant rooms, though small, was a serious concern in terms of lost revenues over prolonged periods of time. These sponsors were

TABLE 14: PROJECT CAPACITY, OCCUPANCY RATES & DEMAND

	PROJECT A	PROJECT B	PROJECT C	PROJECT D	PROJECT E	PROJECT F	PROJECT G	PROJECT H	PROJECT I	PROJECT J	PROJECT K	PROJECT L	PROJECT M	PROJECT N	PROJECT O	PROJECT P	PROJECT Q	PROJECT R	PROJECT S	PROJECT T	PROJECT U	PROJECT V	TOTAL #
No. of residents	9	7	3	8	6	12	7	18	16	24	10	5	3	8	11								
Vacancies			2				3		3			2	7	1									
Months to fill house	1	12+	4	3	6	4	4	6&3	24+	?	4	9+	11+	4+	0			0					
Waiting List	√	√		√		√		√			√					√		√	√				9
Turnover	√	√	√		√	√	√	√															7

expanding the means by which they advertised in the hopes that they would reach a wider potential audience, but remained uncertain of the reason for their difficulty. The most likely explanation was the amount of relatively affordable seniors housing options available at that time. This was a specific regional concern, but it is of course important for a sponsor developing housing to be aware of what other options exist or are being developed in their immediate area, since it is much more difficult for a 6 or 10 unit project to carry vacancies than for a larger project.

Another house was unable to fill all the rooms for a prolonged period of time, in excess of two years, and was still not full when this report was written. This house, however, was one of the double houses, and therefore had twice the units to fill at one time. Unlike the other two double-house projects included in the study, this one built both houses simultaneously. The rate of absorption, therefore, for a single community or neighbourhood, appears to be too slow to provide for adequate residents in a timely fashion. The house committee also staffed and placed residents into both houses at the outset, and neither one was filled. Afterward, they realized that their operating costs could have been minimized if they had filled one house first, and minimizing staffing costs in the interim. It was also observed that because the house was an expensive one, built in a large metropolitan area, that the rents to cover operating expenses and mortgage payments were too high for many seniors, thus diminishing the pool of potential residents. A later arrangement to provided rental subsidies was anticipated to solve this problem with vacancies. Other projects with larger numbers of units, such as double or multiple houses are now cautious of putting too many units into the market place at one time, aware that there may be a limit to how many can be absorbed. This is likely to vary tremendously depending on the demographics and housing market in a specific locality.

Of the fifteen case study projects in operation, nine had hired staff and, with committee or volunteer support, set up the household a few weeks prior to admission of the first resident. Residents were almost universally admitted in stages over a period of several months. While most often this was because they had not been identified or confirmed prior to their move-in, there were cases where resident move-ins were deliberately staggered to allow them to adjust to a new environment, and to the house manager, before also having to get to know other residents. Either way, upon occupancy, the sponsor should not expect the maximum revenue to be generated, and again operating costs need to be carried over a period of some months. Sponsors generally said that it was a few months or sometimes more before everyone was comfortable and familiar with the new arrangement. Aside from this social dimension, however, no problems were encountered in the day-to-day operation of the households, even from the outset.

As mentioned above, several projects, both operating and in development, did maintain waiting lists. A total of nine projects said that they did have waiting lists, but most of them had also said that these the people on these lists were not expected to be ready or suitable when rooms became available. There were two notable exceptions, which had taken deposits from prospective residents to ensure that no one signed up that was not seriously interested in moving in. In one case, units in the house were being customized to accommodate the needs and preferences of particular residents.

13.) Operating and Maintenance Approaches

Twenty of the 22 case study projects were sufficiently far along the development process, if not actually completed, to have predetermined their operating and maintenance systems. Of these 20, eight were receiving some form of government subsidy to offset rents or operating costs. Two had received sufficient private funds to use as a rental subsidy for a proportion of the units. This was set up as a trust fund which would secure the funding, and allow it to be drawn upon as needed.

See **Table 15: Operating and Maintenance Approaches**, following page.

Except in the cases where a project was operated by a private individual or company, management of the house was generally under supervision of a house committee. Some non-profit societies had set up a house committee in parallel with the development committee from an early stage in the project planning. Others, whose main executive was responsible for the development process, established a house committee as a sub-committee of the main. Generally, the house committee's mandate included staffing, resident selection, furnishings and fittings, operating expenses, set-up and ongoing operations. Maintenance of the building was sometimes, but not always included in this scope of responsibility.

The difference between the main or development committee and the house committee was usually quite marked. Where there was almost always overlap in terms of one or more of the executive, the rest of those volunteers on the house committee were often a different group. The skills and experience they brought were again quite different, focusing on household management, interior decorating, care-giving and "people skills". The former, on the other hand, required specific development skills, including financing, marketing, real estate, design and construction.

Another significant difference which was often explicitly noted by board members was the fundamentally different commitment of time and energy required by the house committee as opposed to the development committee. The latter required intensive involvement of time and energy at the beginning, and needed to be sustained over just a few years, often under time constraints and stressful conditions. The former, on the other hand, required little input at the beginning, and often was not formed until the house neared completion. The type of volunteer effort, however, was lower key but sustained over the long term. Volunteers fall into both categories, of course, but it is important that the right people are assigned the right jobs if they are to contribute their best abilities and avoid frustration. It was noted by more than one house committee member that they felt the house committee had been formed too late, and was not able to have contributed to important design decisions affecting the running of the house. Furthermore, the physical design must reflect the philosophy of the organization, and the ongoing management must be consistent with the original conception. Therefore, while their role

TABLE 15: OPERATING AND MAINTENANCE APPROACHES

	PROJECT A	PROJECT B	PROJECT C	PROJECT D	PROJECT E	PROJECT F	PROJECT G	PROJECT H	PROJECT I	PROJECT J	PROJECT K	PROJECT L	PROJECT M	PROJECT N	PROJECT O	PROJECT P	PROJECT Q	PROJECT R	PROJECT S	PROJECT T	PROJECT U	PROJECT V	TOTAL #
Income covers operating costs	√	√	√		√		√			√			√	√	√		√		√				11
Government or Private Operating Subsidy	√		√	√		√	√		√		√	√											8
Private fund for operating subsidy								√									√						2
Volunteer House Committee supervises operations	√	√	√	√			√	√	√		√	√	√	√	√				√	√			14
Maintenance contracted out	√	√	√	√		√	√	√	√	√	√	√											11
Assistance from volunteers	√		√				√	√	√		√	√	√	√									9
On-going fund-raising for maintenance/renovations		√				√							√		√			√					5
Emergency reserve fund from rents	√	√				√		√						√									5
Smooth operation reported	√		√		√	√	√	√	√	√	√	√											10

might be smaller during the planning stages, there is important input that this second group can contribute.

Quite often, the volunteers who have the skills and interest to carry the development process, are not able or interested in staying with the project after it opens. At the very least, they are likely to be exhausted, and to have over-extended their volunteer contribution and need to withdraw for personal reasons. Involvement of those that will manage the house over the long term is essential if continuity is to be achieved. One sponsor solved this problem by maintaining separate committees, with some overlap, during project development, and then collapsing the two committees into one, thereby allowing those whose contribution was of the short-term, intense variety to withdraw, and a smooth transition to result. Some of the development team remained on the house committee to facilitate management of issues that required familiarity with the events during development.

The Quebec projects, which were generally different in that the projects were clusters of small, self-contained units, and the services provided fewer, had a different organization for the house committee. The provincial housing program under which these projects were developed provided for three ongoing staff positions, which included the house supervisor, the caretaker, and a clerk. These three, together with three residents, and one other volunteer, make up the in-house committee which is responsible for management issues, operations, maintenance and activities of the house. The more independent units assume a more active resident population who are able to participate in the decision-making and management of their home. On the other hand, the decision to involve residents in management decisions may be more one of philosophy than of ability.

A few Abbeyfield projects did involve resident representatives on a house committee, though this committee was usually a separate one from the house management committee. The primary purpose of this resident committee was to provide residents an opportunity to by-pass the housekeeper and voice their complaints or preferences about household management directly to a board member or other volunteer. More often, however, this function was handled informally, as house committee members were often at the house to deal with operating issues or to provide social support.

Ongoing maintenance of the house and grounds was usually handled by a combination of volunteer effort and contracted work. Occasionally, a project sponsor was determined or able to manage all the required work through volunteer efforts, but this is of course dependent on the skills available in their volunteer work force. The private sector projects either managed maintenance and repairs themselves, or these responsibilities were handed to a private strata-title organization which would then contract professionals. To some extent this would be set up before title was transferred. For the smaller owner-operated project as well, what could not be managed by the owners would again be contracted, since there was no volunteer involvement.

Volunteers also tended to be involved for social and recreational activities in the non-profit projects. Often the committee volunteers participated in extra-curricular activities for the residents, such as outings, parties, etc. as did many of the part-time staff when they were off-duty. In addition, many Abbeyfield societies have a specific organization called "Friends of Abbeyfield" which is made up of members of the community or neighbourhood who are not necessarily involved in house management, but help out with visiting, outings, driving and many other kinds of activities. It was noted, with a degree of cynicism by some board members, however, that these volunteers were often more enthusiastic than helpful. It is speculated that there is not sufficient dialogue with the residents themselves, and that many of the volunteer services offered are not what the residents want or need.

Six projects maintained an emergency reserve fund, either from excess revenue, or from on-going fundraising activities. This fund was set aside for anything from roof or plumbing repairs to carrying operating costs in case of vacant units. Though not many projects have taken this action yet, it is a growing trend that seems very prudent given the unknowns involved in owning and operating such a project over many years. Most projects, once they were complete, occupied and in operation, did not carry on with any fund-raising activities. A few, however, continued with these activities, using the proceeds for a variety of needs, depending on the situation.

One project had opened with only minor renovations to an older home, and therefore raised funds for ongoing improvements to the house and property. Another sponsor planned to purchase a mini-van with the substantial proceeds of their fund-raising activities, in order to facilitate more resident programming. Others continued with vigorous fund-raising to finance future phases of a multi-level care scheme, particularly in smaller communities where a range of housing and care options were not yet available despite growing need. Two had begun with a supportive group home, but planned to add more of the same, an intermediate care facility, garden apartments, day care or a service house including medical offices on a mixed-use site. This kind of ambitious project scope was less common, and these sponsors were not affiliated with the Abbeyfield society. These organizations, also, tended to own larger pieces of land. The majority of case studies, Abbeyfield or not, tended to be complete, one-house undertakings.

14.) Comparison of Operating Costs

A review of operating costs for the projects in operation is shown in **Table 16: Summary of Project Revenue & Operating Costs (Monthly)**, following page. The wide range of circumstances becomes very clear in some of the expense categories, which are impossible to compare one to another due to differing financing and project designs. The first column, showing monthly mortgage payments, illustrates this variety very well. The amounts here range from a low of zero to a high of $9000 per month. These figures represent not only the difference in costs between larger and smaller centres and between regions, but also reflect the variety of financing methods and development choices which all affected these ongoing costs.

TABLE 16: SUMMARY OF PROJECT REVENUES & OPERATING COSTS (MONTHLY)

	Mortgage Payments	Taxes	Insurance	Salaries & Benefits	Utilities	Provisions	Maintenance & Repairs	Adver- tizing	Other	Monthly Total	R & B Income (incl. subs.)	Fund- raising	Emergency Fund
PROJECT A	$3,204	$480	$117	n/a	$367	n/a	$183	n/a	n/a	$4,351			$6,833
PROJECT B	$900	n/a	$110	$2,500	$400	$1,000	$200-300	n/a	$400	$5,400			$15,000
PROJECT C	n/a	$132	$125	$2,747	$350	$1,040	$422	n/a	$317	$4,816	?		
PROJECT D	$5,000	n/a	n/a	n/a	n/a	$0	n/a	n/a	$2,000	$7,000	$700		
PROJECT E	$600	$320	$33	$745	$244	$1,070	$275	n/a	$225	$3,224	$850		
PROJECT F	$8,000	$620	$207	$2,941	$835	$1,708	$1,026	n/a	$50	$15,337	$1,057	$9500 avg/yr	$10,000
PROJECT G	$9,000	$458	n/a	$2,600	n/a	n/a	n/a	n/a	n/a				
PROJECT H	$9,400	$200	$400	$5,400	$800	$4,000	$200	n/a	$2,000	$21,000	$1155-1180		$600/mos
PROJECT I	$2,723	$976	$264	$4,525	$1,097	$2,508	$639	$169	$70	$17,000	$1,100		n/a
PROJECT J													
PROJECT K	$3,891	$0	$70	$666	n/a	$0	$150	n/a	$1,000	$5,800	25% of res.inc.		
PROJECT L	$2,000	n/a	$212	$2,540	$526	$974	$167	n/a	$635	$6,419	$1100-2250		$720,000
PROJECT M	$0	$500	$167	$2,500	$600	$2,283	$417	n/a	n/a	$6,467	$825-890		10% of revenue
PROJECT N	$3,250	$0	$146	$2,350	$350	$2,000	$250	n/a	n/a	$8,346	850-900		5% Of revenue
PROJECT O	$4,085												
PROJECT P	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	$1,250		
PROJECT Q		$167	$175	$2,667	$733	$1,700	$775	n/a	n/a	$6,217	$690-1204		
PROJECT R	$1,317												
PROJECT S	$8,083	$0								$12,000	$1,350		
PROJECT T	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	$1100-1200		
PROJECT U	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a		
PROJECT V	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a		

Some projects, such as project L, chose to build the project with donated funds *as they became available*. Because mostly volunteer labour was utilized, the project carries no debt. These choices are reflected in the lower monthly room and board fees charged to residents, which are one of the lowest of the case study projects. Project M's expenses are very similar, though a property tax exemption, and lower costs for insurance, utilities and maintenance are what allow this project to charge residents a lower rate of $850-$900 per month. A modest mortgage covered development costs after a generous service club contribution of $150,000 got the project started. With or without land or cash donations, the mortgage sizes still vary tremendously from one project to another.

Each project based their project budget on a monthly rental rate that they felt their particular resident market would bear. Each then had to raise sufficient capital to meet the development costs. The room and board rates vary from a low of $690 to a high of $1350, with many projects setting their rates in the $1100-1200 range, though the type of accommodation and level of support services was virtually identical in all projects (excepting the Quebec and Manitoba case studies.) This middle range generally reflects the actual cost of the projects without subsidy or major donation. The two projects mentioned above are able to set low rates due to cash and labour donations that were received during development, and are able to pass this economy along to all their residents. The lowest rates are for units which receive an across-the-board subsidy, whereas others subtract any available subsidy from their normal rates. The highest monthly room and board rate, at $2250, reflects the cost of amortizing the value of a life-lease contract. For residents of Project C who paid their $150,000 life-lease in full, the monthly maintenance fee is $1100, similar to the non-profit projects. The residents of this project are investing capital in their new home, and this investment plus a return for inflation is returned upon leaving the project. A similar arrangement would have existed for Project E, the equity co-op project that ultimately was developed as a rental. Before abandoning this plan, the sponsor had established co-op equity shares at $79,460 each, and resident-members would then have paid the cost of maintenance, utilities, food and staff each month.

Two additional projects, Projects T and U, have low rental rates which include a maintenance/management fee, but do not include meals or a full-time housekeeper's salary. These are self-contained units grouped around common spaces but are organized differently than the Abbeyfield model. These projects, which are financed through a provincial housing program, also receive significant rental subsidies. In one of these, residents pay only 25% of their income for rent.

Except for the atypical projects mentioned above, and the small owner-operated care home project, the figures for staff salaries and benefits are very comparable. The range is between a low of $2263 to a high of $2941 per month. These figures include both full-time and relief housekeeping staff, but do not include the value of room and board that these staff receive in addition to their salary. The figures for provisions, as well, are reasonably comparable. If the amount is examined on a per house basis, this figure ranges from $974 to $2283. Again, most of the case studies fall in the range of $1000-1700 per month. It is also possible that the higher figures include some of the costs associated with start-up, and that this amount will taper off after years of operation.

Data in the other categories varies tremendously, and is organized differently for each project, rendering the data difficult to compare. Property taxes, for example, ranged between $976 per month for a large, metropolitan project, to nothing for projects in rural areas, or those whose taxes had been waived by the municipality. This occurred, however, in only two or three instances. Insurance as well was highly variable, between $33 and $400 per month. Even utilities vary from a low of $244 to a high of $835, after adjusting for double houses. This high, however, was for a project double the size of many smaller ones. Many projects in the 7 to 10 unit size had utility bills in the range of ± $400 per month.

Two final figures of interest are ongoing fundraising activity, and emergency funds. Two projects that were in operation had continued with fundraising, as discussed in the above section. While some projects maintained a lump sum for emergencies, others planned their projects with a small amount of excess revenue built in, which would accumulate, and provide a buffer in case of emergency repairs, or as is often the case, more vacancy days than anticipated. The importance of this emergency fund or buffer cannot be overemphasized, and indeed more and more of the newer projects are recognizing the value of such a plan. Non-profit organizations run by groups of volunteers must have mechanisms in place to deal with eventualities. These volunteers are not in a position to cover additional costs out of their personal resources, and the additional stress of dealing with unexpected expenses or insufficient revenue is too great an added burden.

ADVANTAGES AND OBSTACLES

The multitude of experiences revealed by the 22 case studies can be distilled to a few key points which highlight the important areas where a project owner or sponsor can stumble, or experience back-breaking difficulties. At the same time, the circumstances which can, and did for some, make the project possible or straightforward can be reduced to a few fundamentals. There are six general areas where project developers met with some degree of difficulty, setbacks or serious problems. These problems took their toll in terms of money, time and energy. Five of these, ironically, are also areas where other sponsors or developers were given some special impetus or advantage in the planning and development of their projects. The comparison between the positive and negative experiences reveals a blueprint for success which can be used as a set of guidelines for groups undertaking similar projects.

Process, Government Bureaucracy & Government Programs

Seven projects noted difficulties with the development *process* itself, although the majority of these involved government bureaucracy, at either the provincial or municipal level. The complexity of provincial housing program regulations were often cited as a hardship, although this was not universally true. For some, the feeling was that the requirements were not matched by either understanding or supports, which left the inexperienced volunteers at a considerable disadvantage. Cumulative negative experience in this regard has led to a general disregard for government funding in some provinces due to the unnecessary hardships that had to be endured. The positive outcome of this experience and perception is the extensive experimentation that has consequently occurred with private funding strategies, particularly since little or no government funding is available any longer.

Several case studies developed under a provincial housing program were greatly facilitated by the network of supporters, coordinators and resources made available through the programs. The differences between programs developed in different provinces was marked. While it is acknowledged that their objectives were very different, the relative role of the provincial coordinator for the projects was quite varied. Non-profit societies were either left to hire, at their own expense, development consultants to assist them with the application and development process, or provided with extensive supports, up to and including design and development consultants and resident recruitment through existing channels. Of the seven case study projects developed under various provincial housing programs, the experiences are generally divided along provincial lines. This suggests that the potential exists for many provincial governments to play an important supportive role in assisting non-profit groups to manage the development process with advice and expertise, even if funding is no longer available to finance such projects, or to provide rental subsidies.

For some projects, the rezoning application process, and additional permit requirements at the municipal level were the greatest obstacles to overcome. Sometimes the design or construction standards at the provincial level were in conflict with municipal requirements, due to differing classifications of the building type, and the non-profit group, with scarce resources, was left scrambling to satisfy both regulatory bodies, often by compromising their own objectives. In certain instances, the requirements of the municipal rezoning application process, and other related development approvals, were considered onerous by the development groups. Generally, however, the volunteers involved handled these situations with forbearance despite frequent frustration.

Several case study projects, however, noted that representatives of the municipal government or staff had been particularly supportive, helpful or even instrumental in their development process. Though it has been suggested that the projects which experienced difficulties from the municipality did so because of their lack of realistic expectations, or lack of experience with the development process, this was not always so. The municipalities themselves varied tremendously in their attitude and approach to these projects, within and across provincial boundaries. The contrasting cases suggest that the municipality can play a larger role than just regulator, in fact providing non-profit groups with valuable advice, assistance and education. While many municipalities may argue that this is not their mandate, and that they do not have the resources to provide such a service, a strong case can be made for it. The cost to the municipality of facilitating the development of such projects can reduce costs to the municipality in terms of efficiency in the approvals process and reduction in conflicts and problems, by ensuring that the development agents have a clear understanding of the requirements, the process and their options. As well, the city can directly contribute to the provision of supportive housing for the elderly in its jurisdiction, which can help to address its planning or housing policy, without contributing financially to development of housing projects, or providing land as some have done. On the other hand, if a municipality does own vacant land or buildings situated appropriately, this is another valuable contribution to the development of group home projects, as discussed below.

Local Politics, NIMBY & Support (in the right places)

Six of the case study projects had some difficulties with residents of the neighbourhood in proposing their group home projects. Opposition from neighbours was experienced to varying degrees, but only very seriously in about three cases out of twenty-two. Only one of these actually resulted in an unsuccessful attempt to gain development approvals for a particular site, this group eventually finding another location to develop their house. In this case, the group had learned the hard way, and were much wiser in their approach to the new neighbourhood.

In the majority of these cases, the group developing the project were, to some extent, "outsiders"; in other words, they lacked a local, grass-roots connection to the particular neighbourhood where they were proposing project development. It was universally the case that neighbours' opposition was due to a lack of information, understanding and/or involvement on the part of the local community. After taking the time to meet neighbours, describe the project and its objectives, and demonstrate sensitivity to the neighbourhood through design of the building, almost all of the opposing neighbours withdrew their objections and became very supportive. Many project volunteers and supporters have emerged from formerly opposing neighbourhood groups. Most development groups are now clear about the necessary steps to informing the local neighbours early in the process to ensure they understand and support the project before a critical stage in development is reached. The literature on the NIMBY (Not In My Back Yard) syndrome supports this open public information process.

Two case studies experienced extraordinary opposition from the neighbourhood, though there were exceptional circumstances which led to this outcome. In one case, a local interest group had organized against unconstitutional wording in the zoning by-law, and the project was caught up in this ongoing legal battle. Ultimately it was not the proposed land use itself, but the by-law terminology that was at issue, and the project was eventually approved. In another case, a long public consultation process was required to satisfy the concerns of a very sensitive, vocal and affluent neighbourhood population which was concerned about the precedent-setting development being proposed, and the long-term impact on the neighbourhood of not one, but perhaps many such projects.

A related problem for three case study groups was an insufficient pool of human resources to do committee work. This was attributed to a lack of formal affiliation with organizations outside of the housing sponsor itself, or with any other groups in the local community. As a projects matures, replacement volunteers for management and programming are required, and affiliation with other, well-established community groups can provide an ongoing source of support and volunteer energy to maintain the group-home project over time.

The contrasting circumstances are those case studies which received extraordinary support from the local neighbourhood or community. Seven projects fall into this category, and all have some interesting characteristics in common. Firstly, committee members were experienced volunteers with well-established networks in the community. They were not equally well-organized within the group or sponsor, nor equally experienced with the development process themselves, but their ability to identify and appeal to influential and knowledgeable members of the community outside of their group enabled them to access significant resources. Interestingly, in six of these cases, the support was obtained by individuals within the municipal government or administration. One of these also received support and advice from an ex-official at the provincial level of government. In the sixth case, the supportive individual was an elected official in the provincial government, who then lobbied other influential members of the community to facilitate the project through financing, fundraising, publicity and other means. As a result, a local credit union provided 100 per cent financing for both phases of the project, and a local cable television station made a promotional-educational video.

Direct support from the municipalities varied from contributions of available land for sale or lease, to contributions of advice and support with the land-use zoning and development approvals process, to actual partnerships in the project. One planner volunteered time to a sponsoring group by helping them locate areas in the city appropriately zoned in order to facilitate their land search. In one instance, the city purchased a heritage building and site, and leased it to the non-profit society, as well as assisting with the development process directly. Another case study received joint support from the municipality and the province by purchasing a heritage building from one, and moving it to a vacant site made available under lease by the other. In one final case, the lead volunteer in the sponsoring group was also an influential member of the municipal staff, with exceptional experience and understanding of the development and construction processes and local codes and by-laws. It might be argued, however, that if the city becomes too involved, there is a transfer of power, and the objectives of the originating sponsor may not be well met when they come into conflict with those of the municipality and its bureaucracy.

Volunteers, Consultants & Other People

Eight projects experienced some difficulty with regard to relationships between individuals, for one reason or another. This took a variety of forms, some which can be anticipated and perhaps avoided, and some which cannot. In one instance, a power struggle from within a group caused short term difficulty in an otherwise smoothly run project. An individual from within an affiliated, sponsoring group was opposed to specific decisions made about the project. Since these decisions affected development approvals, the individual had legal recourse to voice his opposition. The outcome, however, was unsuccessful, and the project went ahead without further difficulty from this individual or any other. While the motive of this particular opponent for interfering with the group's progress may have been personal, the result was still a delay in progress and unwanted legal expenses. There is always the possibility that affiliation with another group may lead to differences between individuals over details of the project, or competition for positions of leadership.

Even within the sponsoring group, however, a lack of coherence in the group, leading to internal criticism, can wear down the spirit and lead to unnecessary turn-over in the group membership. This, while it is usually overcome, results in lost momentum which can drag out the overall development process and tire even the most resilient participants. While in the private sector, a company president can "get rid of" employees not doing their jobs or causing problems, volunteers only leave if they want to. Persistent differences in opinion or competition for power or leadership can also alienate group members, leading to a loss of interest in the project, and sometimes result in lost membership and inadequate manpower to carry the workload. This was a problem experienced to varying degrees by three of the case study projects.

Another, quite different people-problem occurred between the development group and their hired consultants. Many difficulties with consultants resulted from a lack of appropriate experience with the process leading to unrealistic expectations. However, poor communication, a relationship that was fundamentally not good to begin with, or a lack of trust between the clients and the consultants also led to problems and often to severed relationships. This was the experience to varying degrees for only three of the case studies. This is an unfortunate and difficult outcome for the developing sponsor, since a great deal of momentum is lost, and additional time and expenses are involved in replacing a consultant and bringing the new one up to speed on the project. It is well worth the effort to interview several consultants at the outset, and hire one with whom the client group can develop a rapport and a mutually trusting and respectful relationship that can endure the challenge of the entire development process. Several projects benefited from exceptionally good relationships with their development and design consultants with smooth, efficient and cost-effective developments the result.

Generally, some problems occurred due to a lack of skill and experience with development process on the part of the sponsoring group members. This was a more diffuse problem, however, resulting in stagnating progress on the project and frustration on the part of volunteers. It is the corollary that is more significant, and the importance of a knowledgeable, coordinated and dynamic group of volunteers is discussed below.

Four projects stand out in particular for the outstanding quality, skill-level, organization and effectiveness of the group of volunteers responsible for the project. Each case was different in its details, but the essence was the same. Each group was led by one or two strong and energetic individuals with a very clear view of the project's objectives. These individuals sought input from others who were likewise energetic and clearly focused. Additionally, the group of individuals were carefully selected for their specific skills and knowledge. A few key roles stand out as essential to the overall success of the project, and these include: the coordinator or organizer, the publicity, public-relations and fundraising person, the financier, the developer or contracting expert, and the health-care or long term care specialist, who also attends to household management and staffing issues. Additional expertise includes both legal and real estate advice, although these can be obtained externally, as can design and planning assistance. One additional important ingredient is the coherence and clarity of purpose of the group of individuals. This, finally, is achieved through effective communication and mutual respect.

Economics

There are a variety of issues that can be grouped under the heading of economics, including money itself, and an appreciation of financial planning. A few of the case studies had considerable difficulty raising the necessary capital to develop the project. For one in particular, because the property was to be leased, obtaining financing without collateral was a major stumbling block. Eventually, a combination of charitable donations and financing through a private pension fund were secured. For two others, successful fundraising was difficult, and took much longer than anticipated. A minimum amount of capital was again necessary to reduce the amount of money that needed to be borrowed, and without major donors, this was a long and tedious exercise. In a similar vein, another project required financial deposits from eight out of ten potential residents before a CMHC insured mortgage could be obtained, and it proved too difficult to maintain the commitment of seniors for the duration of the development process.

Aside from difficulty raising funds or securing financing for the project development, there were some problems associated with poor management of financial resources. In one instance, substantial resources were not utilized as effectively as they might have been were professional financial management involved in project planning. The unfortunate result was greater difficulty managing short term debt and long term expenditures than was necessary had a different approach been taken. Several projects had to deal with substantial, unexpected additional costs during construction which placed an additional burden on resources. While it is often difficult to anticipate such things as ground water, bedrock or rotten roofs, an experienced developer knows to leave a generous contingency to accommodate the unknown. In both new construction and renovations, there is inevitably something more than is originally budgeted for. Four case study projects had a fairly substantial problem of this kind.

One final financial difficulty that a few projects experienced involved the unanticipated carrying costs while looking for residents, both upon start-up, and at various later stages when vacancies extended longer than anticipated. Some projects anticipated this eventuality, and took precautions in establishing both development and operating budgets. This practice is now highly recommended by those with experiences both positive and negative.

Land & Benefactors

The final category which was experienced as either a positive or as a negative factor, was that of locating and acquiring suitable land for development. Eight case study projects had difficulty with land. Several had trouble locating affordable land in large cities and metropolitan areas, and this had serious consequences for project viability. In other areas, where land was more affordable, the issue was one of finding available, suitable land, in terms of size or situation. Finally, some of those groups who were able to lease land were burdened by complex land-lease arrangements that slowed the development process, or difficulty securing mortgage financing without collateral. Alternatively, projects that had secured land, could use that land to facilitate construction financing.

Benefactors are grouped with land here because the corollary of having difficulty finding property for project development, is to be donated land, or a substantial financial contribution which eliminated the difficulty of affording land or securing a mortgage. Land was made available for projects, either through donation or non-market lease, in seven case studies. In two others, large cash donations facilitated the acquisition of suitable land with relative ease. Finding an available, appropriate and affordable piece of property, or a building suitable for conversion, is one of the biggest challenges facing groups wishing to develop a supportive group-home project, and since it must happen early on in the process, and other development decisions hinge on its particulars, it can be, and has proved a significant stumbling block for many groups.

Innovation

Two projects experienced significant difficulty directly in proportion to the innovative forms of tenure which they attempted to implement. A lack of clear precedent leaves an organization exposed to uncertainty and the possibility of errors in judgment, as well as the burden of solving previously unmet problems. There can be also be problems obtaining capital if the project is some form of equity situation, as it is not then viewed as non-profit, nor is it considered eligible for charitable donations. If the project depends, either before or after development, on the equity contributions of residents, the demand for this tenure option must be well-researched and demonstrated in the local market before the project commences. These particular difficulties aside, it must be remembered that trying anything new usually takes extra time, and groups must be prepared for this when venturing into new territory. In general, however, where equity projects are concerned, there appears to be growing interest in these options. The challenge, it seems, is in securing adequate financing to develop the project, market it and carry it, after which the seems that there is adequate demand from seniors with capital.

PATTERNS AND ANOMALIES: A TYPOLOGY

Examining the twenty-two case studies for patterns overall, in order to place them into a typology generates five larger categories or types, each with a series of variants. The value in this exercise is in trying to identify a general set of circumstances with which a new development group might identify itself, and thereby draw conclusions from this report which are most relevant to their situation.

Type A: Regional Prototypes

This type is designed to recognize the unique situation of projects which were "firsts" in their region. These projects will remain special, and in some ways atypical, because the circumstances under which they were developed cannot be replicated. Subsequent projects have had greater access to information and experience, and had these projects as examples to help them make decisions. The projects that fall into this category were solitary innovators and took risks that are unparalleled.

Sub-type A.1: Prototype with minor renovation

Three prototypical case study projects did not build new, but bought larger, older homes or other suitable buildings to convert to use as a supportive group home. This approach largely follows the traditional route taken in the UK, though was met with varying success depending on the size and nature of the original building acquired. It is generally considered that there are too few available older homes in Canada large enough to accommodate the programmatic and building code requirements necessary to create the ideal group home here. Where available, however, this approach can provide a faster, potentially less expensive option than building new, and make effective use of an older home that may be too large for continued use as a modern, single-family dwelling. Another advantage of this approach is the established neighbouhoods within which older houses are typically located. These areas are both comfortable and familiar to the local seniors, and are usually well-serviced by shops and services.

Sub-type A.2: Prototype built new

Three additional projects falling into the "prototype" category purchased land and designed and built new houses to accommodate their vision of a supportive group home, according to the Abbeyfield model borrowed from the United Kingdom. Each of these began the process of improving, evolving and adjusting the UK model to better suit the lifestyle, temperament and expectations of older Canadians. This process has continued with each successive generation and innovation. These projects, more than any others, piqued curiosity and stimulated debate about the potential of this "new" housing model. In particular, they began the exploration into how this type of housing should look, and how it could best be integrated into existing neighbourhoods.

Sub-type A.3: Provincial Program

Five of the six projects in Type A overall were developed under provincial housing programs, which are no longer available. In this regard, some of the experiences of these prototypes will not be relevant to later projects, particularly in financial matters. Other issues, such as design innovations, staffing and operational policies unique to the Canadian situation, were hammered out through trial and error and stand as important precedents for newer projects to follow.

Types B & C: Second Generation Developments

Generally Types B and C overlap, because the case studies fall into different groupings depending on the variables which are examined. A group looking for a good fit after which to model itself might find both a B type and a C type that apply. The bulk of the case studies fall into these two categories. Many of these projects, whether renovating or designing new buildings, experienced the process of rezoning land in order to accommodate the new use. The variation in experience within this category, including the emerging issue of private financing, places these projects fully into the housing development realm. The particular characteristics of each sub-type are outlined below.

Sub-type B.1: Second Generation renovation and addition

Five case study projects fall into this sub-type, that is, projects that were able to draw on the experience and precedent of an earlier local or regional project, but due to specific preferences, circumstances or available resources, chose to develop a new project by making use of an existing building. To varying degrees, these buildings were renovated and added to. The size and nature of the additions and renovations of these projects rendered them larger, more expensive and more thorough construction projects than those of the earlier generation (Sub-type. A-1). The fact that these additions often nearly doubled the size of the project seems to indicate that a pattern has emerged that allows the re-use of older, smaller (by European standards) Canadian houses and yet not compromise growing space and safety standards. These extensive renovations were not less costly options than building new, but did provide project (usually land/location) opportunities that might not otherwise have been available in their area.

Sub-type B.2: Second Generation built new

The alternative approach, that of acquiring land by purchase or lease, and building new, was taken in seven case studies. Four of these leased land, and three purchased or already owned it. Each project involved hiring an architect, and revisiting the question of what a supportive, Abbeyfield-type group home, or sheltered living group should look like. The question of ensuite toilets, private baths or showers, and even kitchenettes in each unit was addressed. As well, the size, character and relationship of shared spaces, kitchens and utility areas was examined anew. Importantly, the more generous space standards have become, the more the line blurs between the group home, and the small multi-unit housing project. This has opened up a new potential problem, which relates to the applicable building code requirements. The less a project wants to resemble a large family home, the less it is allowed to. Perhaps it is too late to have a choice in the matter. The question remains: Does the ultimate result satisfy the group's objectives and their residents' needs?

Sub-type C.1: Service Club major support

The same group of projects falls into different categories if the character or affiliation of the development groups is examined. Four case study projects were developed with major support (financial or organizational) from local service clubs such as Rotarians, Kinsmen, Kiwanis, IOOF or Lions. Many of these organizations have traditionally been involved in providing housing for seniors, and this kind of partnership both works well for all parties involved, and appears to be a growing trend. In addition to available, often skilled, volunteers and a strong community presence, these groups often have established fund-raising mechanisms that can provide important seed money for project development.

Sub-type C.2: Church major support

Likewise, the sponsorship and support of a local church or other religious or cultural group is a strong trend that has several advantages. These include: available land and resources, abundant, committed volunteer labour, and solid, grass-roots community involvement. Five of the case study projects received major support from a church group. The land for most of these projects was also provided by the church.

Sub-type C.3: Municipal major support

A less common trend, but an interesting and promising one is that of municipal governments providing support to non-profit housing groups. Two of the case study projects received major support from a municipality because of pre-existing mandates, political will or both. This support was both financial, including helping to secure land and buildings, and technical. The potential for many more municipalities to play a supportive and instrumental role in facilitating these projects is very great. It is important, however, that the municipality and the non-profit organization be clear about where ownership and control ultimately lie, and reach a consensus about the objectives of the project.

Type D: Tenure Innovation

Three, more recent, case study projects stand out for their efforts to innovate in terms of form of tenure, while still adhering to the spirit and intent of the housing model as a supportive, family group-home. The three alternatives to standard rental projects that have been attempted or implemented include: equity cooperative, life-lease, and strata-title ownership. While there have been some technical and financial challenges, these are to be expected. The response to each alternative has been generally very positive, and they appear to have enourmous future potential in the appropriate market area. The benefits of this type of supportive housing are just as appealing to those seniors with capital as to those without. These financial innovations stand as examples of the resilience, popularity and adaptability of this basic housing model in a Canadian context.

Type E: Care Facilities

Though not a major focus of this study, two of the case study projects fall into the category of licensed care facility, though physically resembling the supportive, group home housing model. While the issue of staffing and licensing make these more complex undertakings, they are not irrelevant in this context. The experience of developing such a facility is very similar to the Abbeyfield-type group home. The fact that they exist is of interest in itself. From both the perspective of the health care system, its scarce resources and increasing inability to serve lighter-care elderly nursing patients, and from the perspective of group-home residents aging-in-place in the community, the line between these two types of shelter is becoming thinner, and more arbitrary. It would serve both the health care and supportive housing industries well to explore how shelter and care can come together in a single setting.

CONCLUSIONS AND RECOMMENDATIONS

The most important and overriding recommendation that has emerged from this study, and to which many of the other critical variables relate, has been aptly phrased: "to ensure affiliation with a supportive constituency." Just what exactly is a "supportive constituency" and why should it make such a difference in the success of small-group home development? The answer may lie in the very nature of this supportive housing model.

The Abbeyfield model, and the other variations on the small, supportive living group that have emerged around the world, all aim to provide a housing alternative to the frail elderly within the context of a local neighbourhood, or community. By virtue of the small number of residents accommodated, the projects need not draw on a "market area" that is larger than this, though people from outside the area are not excluded. It is conceivable that every neighbourhood with any significant number of older people could accommodate or might require such a project. Also, because of the small size and domestic character of the projects, they are typically and most appropriately located in low-density, often single-family, neighbourhoods. These characteristics combined mean that such a project is uniquely invested in, and an integral part of this local community.

Throughout the development process, each key step potentially affects, or is affected by the position and identity of the project within this context. The volunteers who emerge to initiate and carry the project are often themselves affiliated with a particular community or neighbourhood. The use of land and existing buildings roots the project in a particular place, and the process of integrating the project into both a physical and social context that is more intimate and personal than for larger developments, makes the relationships between the various players in the neighbourhood more critical than otherwise. Success comes more quickly when a group's affiliation and efforts are focused on a tightly-knit local community, and that community perceives their work as contributing to the well-being of its members.

The supportive constituency referred to above is also of this particular place, and can take many forms. These can include service clubs, churches and other religious or cultural associations, municipal governments, community associations or any other such organization that has a history and an established relationship with the particular locality. Partnerships between any of these groups are also effective mechanisms by which to facilitate the acceptance and development of a project.

These "... community organizations ... provide continuity, legal responsibility, administrative support or volunteer help to ensure that operations are self-sustaining and non-profit." (Murray, 1988). More importantly, perhaps is the fact that most of the advantages and obstacles in each stage of project planning and development outlined in the previous section are profoundly affected by the involvement of such a "supportive constituency." The differences can be seen by comparing those areas in each example that proved most or least problematic. The most trouble was generally encountered where this supportive relationship was absent in one sphere or another.

The purpose in recommending affiliation with a supportive constituency is not for its own sake alone, but rather because it can provide or facilitate one or more of the following critical ingredients to successful project development:

1. *Manpower*: existing community organizations can provide a source of project leaders, board members and other volunteers with skills and experience in several important areas, including project management, architecture and construction, public relations, finance, health or long term care, personnel management, law and real estate. In the absence of a supportive constituency, it is important the project leader(s) solicit the involvement of people with these skills, and ensure their full participation and commitment to the project.

2. *Development Know-how*: depending on the composition of the group and its affiliated members, the importance of one or more individuals with knowledge and experience with the development process is critical. When these people are not a part of the team, the team must recognize this and retain consultants to fill this role and act in an advisory capacity. The complexity and challenge of the development process requires particular familiarity with the process in order to anticipate and plan for each stage of project development, and to manage this complex process on behalf of the group. Without the specific involvement of the municipality in the project, it is important that the group's representative, whether volunteer or consultant, also initiate a dialogue with the local planning and building departments, as well as elected representatives. The process of satisfying the municipality's requirements is easier if they are known in advance, both the written and unwritten expectations and attitudes toward the project. Furthermore, ensuring the municipality understands the nature and objectives of the project can help to forge a supportive relationship through the planning process.

3. *Neighbourhood*: affiliation with an existing community group of any type saves the group a great deal of public relations effort, and helps the local community feel that the project is its own. An established presence and communication network facilitate neighbourhood awareness and acceptance of the new project and avoids potential delays and conflict. Additional volunteer support is also generated by a good relationship with the local neighbours. A development group without this affiliation must expect to compensate by being very active in the community during the pre-planning and planning stages to ensure community support.

4. *Financing*: the relationship between sponsoring group or board personnel, the links of the project to the community, and the potential for fundraising is significant. The involvement of a supportive constituency can translate into direct contributions of capital or land, acquired through fund-raising efforts and investments over a longer period of time that can be transferred to the project budget. Furthermore, the community organization may have in place existing fund-raising

mechanisms, and networks that can be activated specifically for the project. Finally, the image and reputation of the established community organization can facilitate reception and support of requests for donations to individuals, memberships or congregations, businesses and agencies in that community. Many times the resources are available and merely need to be committed by individuals who are more easily convinced by long-standing friends and colleagues in the community. Likewise, many agencies and organizations reserve funds specifically to support local undertakings as part of either their own public relations campaigns or charitable activities.

5. ***Real Estate***: in a similar way to the discussion of fund-raising and financing above, the ability of a group to identify and access a suitable piece of land, with or without a building, well-located within the target neighbourhood, is greatly facilitated by a broadly-based supportive network in that community. Affordable and available land is a scarce resource in developed urban areas, and the wider the reach, the more likely that appropriate options will come forward. Moreover, established community organizations are often the long-time owners of surplus land acquired in an earlier time. An affiliation with these organizations increases the likelihood that such real estate is to be made available for the project, whether from municipalities, churches or other community organizations. Where this option is not a possibility, the supportive constituency can be very helpful in identifying potential properties in appropriate areas which are often also sympathetic to existing zoning by-laws and land use plans.

6. ***Marketing***: all project groups are recommended to have a clear understanding of who they are serving with the proposed residence. Although needs assessment surveys are useful tools to establish local need and receptivity to the particular characteristics of the housing model, organizers should be aware of the idiosyncrasies of this user group. Waiting lists will not serve well when vacancies are available. Groups are advised to establish strong cooperative communication links with a variety of seniors, health and social service agencies in their local areas with the understanding that referrals will be made. In addition, a reserve fund ensures that operating costs can be covered while vacancies are being filled, either upon start-up, or from time to time as residents leave. Those developing projects for alternative forms of tenure than rental, such as equity co-ops, strata-title condominiums and life-lease contracts will need to establish a clear market demand for the particular product they will be selling, and have a well-designed marketing strategy. Assistance from a real estate industry expert would be strongly advised. Again, project financing must allow for the time required to sell units or shares.

7. ***Clear Mission***: another important recommendation is that development groups explicitly articulate their mandate and philosophy early in the project planning. Even the most supportive, talented and committed group of individuals needs to be clear about its purpose and goals, and have mechanisms in place to ensure effective communication and understanding amongst members, partners, consultants, and authorities.

8. ***Research Precedents***: yet a new generation of project appears to be emerging. Groups now have access to substantially more information and are successfully pulling together resources and completing projects from inception to occupancy in record time. Since this study was begun, housing sponsors have emerged and opened houses in a single year. Groups interested in developing a supportive group home or group-living project for older Canadians are advised to do their research. An abundance of precedents now exist, and there is a wealth of experience that has accumulated amongst dynamic and committed people in many areas of the country. As well, though major government funding for new construction is generally no longer available, the recognition and support of governments is starting to make a difference to project success. Any individual or group wanting to develop a supportive group home in their community today need not struggle in isolation or re-invent the wheel as their predecessors have done. The efforts of the last decade (the first decade) has succeeded in opening many doors. Hopefully this study, and this report, can further pave the way.

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appointment of a consultant; description of what is expected of the consultant; and appendices including draft letters, a schedule of Work Stages, and a Provincial Architects' Association Recommended Schedule of Fees.

Shimizu, K. (1988). The Abbeyfield Model, in Gutman, G. and Blackie, N. Housing the Very Old. Burnaby, B.C.: Gerontology Research Centre, Simon Fraser University, pp. 111-118.

St. Andrew's Abbeyfield Housing Society. (1991). Manual of Policies and Procedures. Sidney, B.C.

Covers general organization of the house, logistics, resident selection, household maintenance, emergency procedures, appraisal procedure, medical and dietary concerns, financial arrangements, staff positions, and emergency procedures.

Wilson, J. W. et al. (1990). A Perspective on Abbeyfield in B.C. Class paper from Geog 490, Simon Fraser University, unpublished.

Other Housing Options

Architecture-Research-Construction Inc. (1985) Community Group Homes: An Environmental Approach. New York: Van Nostrand Reinhold Company.

A study of group living situations from an environmental perspective, that outlines the physical, social, and organizational issues that must be addressed in order to make such settings supportive for their residents.

Baker, J. G. (1994). Supportive Housing for Elderly Persons in Ontario, in Gutman, G., &
Wister, A. (1994). Progressive Accommodation for Seniors: Interfacing Shelter and Services. Vancouver, B.C.: Gerontology Research Centre, Simon Fraser University, pp. 85-99.

Argues that clear policies are needed to guide planning and implementation efforts, if the redirection of long term care in Ontario is to depend on supportive housing as an important factor in the prevention of institutional admissions and the maintenance of people in the community. Provides an operational definition of *supportive housing* as "a program that, through a cooperative planning and delivery process, provides personal support services in permanent, preferably in not-for-profit community residential settings, for elderly and physically disabled people whose levels of need require the availability of on-site assistance." Outlines the following principles for supportive housing programs: 1) Individualization, 2) Flexibility, 3) Integration, 4) Independence, 5) Stability, 6) Safety, and 7) Self-help. Describes some models of supportive housing that include Tenancy, Clustered Accommodation, Integrated Tenant Mix, Community Integration, Not-for-profit Service Providers, Off-site Administrative Offices, and De-linked Services.

Bordon, L. and McGregor, J. (1992). Current Realities and Challenges in Providing Services to Seniors: The Home Care Perspective, in Gutman, G. & Wister, A. (1994). Progressive Accommodation for Seniors: Interfacing Shelter and Services. Vancouver, B.C.: Gerontology Research Centre, Simon Fraser University, pp. 47-56.

Brink, S. (1994). Social Policy Models for Shelter and Services: An International Perspective, in Gutman, G. & Wister, A. (1994). Progressive Accommodation for Seniors: Interfacing Shelter and Services. Vancouver, B.C.: Gerontology Research Centre, Simon Fraser University, pp. 101-118.

CMHC Housing Choices for Older Canadians. Ottawa

CMHC (1988). Options: Housing for Older Canadians. Conference Proceedings. Halifax, N. S. Oct. 17-20, 1988.

CMHC (1989) Innovations in Housing for Seniors. Ottawa

CMHC (1990). Today's Seniors - Tomorrow's Housing. Conference Proceedings. May 15-17, 1990, Charlottetown.

CMHC (1990). Choices Today, Options Tomorrow: Seniors Housing for the 90's. Conference Proceedings, June 25-27, 1990, Vancouver.

CMHC (1995). Partnership Courier Canadian Centre for Public-Private Partnerships in Housing. Vol. 4 (1). (newsletter).

City of Toronto, Planning and Development Department. (1985). Group Home Monitoring Report, 1984. Toronto, Ontario.

A report on group home activity in 1984 in the City of Toronto, regarding the establishment of new programs, their distribution, and the client groups served.

Continuing Care Division, British Columbia Ministry of Health and Ministry Responsible for Seniors. (1993). Group Homes for Independent Living: Guidelines. Province of British Columbia.

A guide for the development and operation of Group Homes for Independent Living, for Continuing Care Division staff and Group Home operators. Outlines the procedures for new proposals, selection criteria for residents, eligibility for other services, funding, and operational responsibilities.

Doily, V. (1992). Choice, Control and the Right to Age in Place, in Gutman, G. & Wister, A. (1994). Progressive Accommodation for Seniors: Interfacing Shelter and Services. Vancouver, B.C.: Gerontology Research Centre, Simon Fraser University, pp. 33-44.

Gaynes, N. L. (1973). Comprehensive Planning: New Facilities and Redevelopment. Non-Profit Homes for the Aging: Planning, Development, and Programming. University of Southern California, Ethel Percy Andrus Gerontology Center.

Discusses the importance of long term planning in the development or redevelopment of either institutional or non-institutional services to the aging. Considers approaches to planning and the "Design of the Planning Effort".

Gallagher, E. (1994). Group Homes: The Swedish Model of Care for Persons with Dementia, in Gutman, G. & Wister, A. (1994). Progressive Accommodation for Seniors: Interfacing Shelter and Services. Vancouver, B.C.: Gerontology Research Centre, Simon Fraser University, pp. 77-84.

Golant, S. (1992) Housing America's Elderly: Many Possibilities/Few Choices. Newbury Park, California: Sage Publications Inc.

Examines the appropriateness of various housing options for the elderly population of the US; considers the strengths and weaknesses of the array of organized housing-related solutions, the extent to which older people have adopted these solutions, and the reasons why they have adopted them.

Gutman, G. & Wister, A. (1994). Progressive Accommodation for Seniors: Interfacing Shelter and Services. Vancouver, B.C.: Gerontology Research Centre, Simon Fraser University.

Heumann, L. & Boldy, D. (1982). Housing the Elderly. London: Croom Helm and New York: St. Martin's Press.

Heumann, L. & Boldy, D. (1993). Aging In Place with Dignity. Praegar: Westport & London.

Horne, J. with Baldwin, L. (1988). Homesharing and Other Lifestyle Options. Washington DC: American Association of Retired Persons.
Provides an overview of housing options that promote an independent lifestyle for seniors, considering the advantages and disadvantages of homesharing, accessory apartments, the ECHO House, and group shared residences, and also of housing options with supportive services, considering the advantages and disadvantages of small group living with services, congregate housing, and the Lifecare Community.

Lidmar Reinius, K. (1986). Gruppboende for Gemenskap och Oberoende: Diskussion om utforming av kollektiva bostader for service och vard. [*Group Living for Community and Development: Discussion of planning for collective housing for service and care*]. Stockholm: Statens rad for byggnadsforskning. (available in Swedish only).

Lionsview Seniors Planning Society. (1993). The Breaking Wave: Housing for Seniors on the North Shore. North Vancouver, B.C.

Addresses housing issues, based on the responses of 690 seniors to questions about their housing needs. Determines that essential requirements are affordability, manageability, safety, ease of maintenance, opportunity to function as an independent unit, and convenient location. Also discusses demand for supportive housing, including sheltered housing, special retirement housing, congregate housing, cooperative housing, and Abbeyfield houses.

Lusk, C. W. (1994). Public, Private and Non-Profit Partnerships: The CCPPPH Link, in Gutman, G., & Wister, A. (1994). Progressive Accommodation for Seniors: Interfacing Shelter and Services. Vancouver, B.C.: Gerontology Research Centre, Simon Fraser University, pp. 67-75.

McCoy, J. L. & Conley, R. W. (1990). Surveying Board and Care Homes: Issues and Data Collection Problems. The Gerontologist, Vol. 30, No. 2, April 1990.

Milone, D. (1986). Shared Housing Model Projects in Maryland, Georgia, Ohio, Colorado, and Texas. Comparative Approaches to Developing and Operating Shared Housing Programs. Philadelphia, PA.: National Shared Housing Resource Center.

Discusses shared housing as an alternative living arrangement, considered particularly beneficial to the elderly. Provides examples from model projects in five regions of the US

Moon, M., Gaberlavage, G., & Newman, S. J. (Eds.). (1989). Preserving Independence, Supporting Needs: The Role of Board and Care Homes. American Association of Retired Persons, Public Policy Institute.

A collection of papers presented at the AARP conference in January 1988, highlighting critical issues related to board and care facilities, and suggesting possible directions for the future.

Murray, C. (1988). The Small Congregate Home, in Gutman, G. and Blackie, N. Housing the Very Old. Burnaby, B.C.: Gerontology Research Centre, Simon Fraser University, pp. 87-110.

Murray, C. (1988). Supportive Housing for Seniors: The Elements and Issues for a Canadian Model. Ottawa: CMHC.

Reviews the precedents for supportive housing as Abbeyfield in England and Australia and Canada, and as small scale congregate housing in the US and describes a pilot study which examined the potential for supportive housing in Vancouver. Respondents to the survey generally preferred most of the essential characteristics which define supportive housing, e.g. small size, shared kitchen and activity areas, mutual support among residents, and an active part in the affairs of running the home. However, they also preferred a full private apartment for each resident rather than the "bedsitting, half-bath, and kitchenette package of the Abbeyfield model.

Munns, E. A. (1973). Approaches to Financing and Facility Development. Non-Profit Homes for the Aging: Planning, Development, and Programming. University of Southern California, Ethel Percy Andrus Gerontology Center.

Outlines the steps in planning a new facility.

Priest, G. E. (1994). Current Demographics and Living Arrangements of Canada's Elderly, in Gutman, G. & Wister, A. (1994). Progressive Accommodation for Seniors: Interfacing Shelter and Services. Vancouver, B.C.: Gerontology Research Centre, Simon Fraser University, pp. 13-32.

Romank, L. (1992). Small Scale Congregate Retirement Housing - Opportunities for Alberta. Innovative Housing Grants Program of Alberta Municipal Affairs.

A study seeking to identify and develop the smallest design and administrative format for a seniors' housing facility, which offers the support of conventional congregate housing, but does so in a small-scale and non-subsidized residential environment.

Streib, G. F., Folts, W. E., Hilker, M. A. (1984). Old Homes - New Families: Shared Living for the Elderly. New York: Columbia University Press.

Research that focuses on shared living households for older people, considering the need for shared housing, the continuum of living arrangements, case study examples of shared living arrangements including other alternatives such as Abbeyfield Houses, and also examining the problems encountered in establishing shared living arrangements, the sociological interpretations for such arrangements, and finally the policy implications for shared housing.

Streib, G. F., Folts, W. E., & LaGreca, A. J. (1985). Autonomy, Power, and Decision Making in Thirty-Six Retirement Communities. The Gerontologist, Vol. 25 (4), pp. 403-409.

A study examining how autonomy and decision making manifest themselves in thirty-six retirement communities in the US Autonomy, defined as the determination of goals, policies, and operation of the local community and its units by residents, rather than by outsiders, is central to the study, under the assumption that self-government and control over one's future have a significant impact on a community's quality of life, considered an essential determinant in an individual's decision to enter this type of environment. Findings indicate that autonomy is basically latent, with residents wanting the possibility of decision-making when a crisis arises or community stability is threatened.

United State Conference of Mayors. (1985). Assessing Elderly Housing, A Planning Guide for Mayors and Local Officials.

A guidebook intended to assist Mayors and local officials in developing a framework to measure elderly housing needs and to develop a systematic strategy for assisting the elderly in their city with choices in suitable and affordable living arrangements.

Regulatory Issues

Association of Municipalities of Ontario. (1982). AMO Reports, 82-1, Report on Adult Residential Facilities. Ontario.

A report considering issues related to the shift from institution-based care to community-based health and social care. In particular, it considers the role that the Municipality should play in community-based care.

B.C. Housing Management Commission. (1994). Planning Your Special Needs Housing Project. Burnaby, B.C.

A manual to assist groups in planning for the construction and renovation of special needs housing, and to provide information about the different products, finishes and features that are available. Covers interior and exterior standards, and also mechanical and electrical standards.

CMHC (1986). Facilitating Production of Affordable Housing Through Regulatory Reform and Streamlining Approval Processes. Prepared for the National Conferences of the Canadian Association of Housing and Renewal Officials, May 26-28 1986, Toronto, Ontario, and The Federation of Canadian Municipalities, June 2-5, 1986, Hamilton, Ontario.

Outlines how reform of restrictive regulations could produce major financial savings for governments, industry and consumers, by providing opportunities for more affordable housing, without sacrificing essential health and safety needs, or compromising local amenities, property values, or municipal tax bases. Suggests that opportunities for reform exist in streamlining of approval processes; adoption of less restrictive, innovative planning controls; reduction of sub-division development standards; modification of building codes for renovation work; and movement towards performance codes for new construction.

Geller, M., & Burgess, B. (1989). Development Controls for Seniors Housing. Greater Vancouver Regional District.

A report on a study that examines existing and potential new forms of seniors accommodation from the perspective of development controls. It identifies specific issues which adversely affect the design and development of seniors accommodation and makes recommendations on how to modify zoning bylaws and regulations to encourage the development of a wider range of housing options for seniors.

Lidstone, H. K. Jr. (1992). Group Homes: Mandated by Statute but Locally Regulated. The Colorado Lawyer, Vol. 21 (8), pp. 1645-1648.

Discusses the laws relating to group homes, and the issues that local zoning authorities should consider when complying with their statutory mandate. Under both the municipal and county zoning statutes, the legislature specifically gave local zoning authorities the right to impose regulation on these homes, provided the regulation did not result in the exclusion of group homes from residential districts. Factors that may be considered include lot size, area, traffic, the operator, and other factors that may determine whether a group home is proper in a specific location.

Manitoba Community Services. (1987). Consultation Paper on Proposed Changes to Provincial Regulation 41/81 Governing Residential Care Licensing. Manitoba.

A report on proposals for changes to residential care regulations which aim to protect community interests for both clients and their neighbours. The proposals considered include the following: 1.) Residential facilities should match their neighbourhood; 2.) Residential facilities should be dispersed; 3.)Need for adequate access to community resources, and
4.) Expansion of the types of residential care facility to be approved or licensed.

Ministry of Municipal Affairs, Building Standards Branch. (1994). Draft of Secondary Suites: Proposed Revisions to the B.C. Building Code. Victoria, B.C.

Proposes revised definition of *secondary suite* in Part 1, Article 1.1.3.2, and also covers the scope and specific requirements for such suites in Part 9, Section 9.36.

Pollak, P. B. (1994). Rethinking Zoning to Accommodate the Elderly in Single Family Housing. Journal of the American Planning Association, Vol. 60 (4), pp. 521-531.

A paper examining recent efforts to overcome the zoning barriers to shared group quarters, accessory apartments, and elder cottages for the elderly.

Soper, C. L. The Fair Housing Act Amendments of 1988: New Zoning Rules for Group Homes for the Handicapped. Saint Louis University Law Journal, Vol. 37 (4), pp. 1033-1066.

Considers how the FHAA should be applied to zoning laws regulating the establishment of group homes for the handicapped.

NIMBY Syndrome

Arens, D. A. (1993). What Do the Neighbours Think Now? Community Residences on Long Island, New York. Community Mental Health Journal, Vol. 29 (3), pp. 235-245.

Assesses the perceptions of the impact of community residences in five suburban communities in Long Island, New York. Although NIMBYism had been exhibited during program development, after a few years the overwhelming majority agreed that the community residences were good neighbours, presented no problems, and had no adverse effect on property values.

Baxter, B. (1993). The Art of Building Consensus: San Diego Seeks Public Support For its Affordable Housing. Competitions, Vol. 3 (1), pp. 10-20.

Review of the *Affordable Living/Building a City of Neighbours* competition, organized by the San Diego Housing Commission as a step towards gaining public acceptance for construction of affordable housing.

Clingermayer, J. C. (1994). Electoral Representation, Zoning Politics, and the Exclusion of Group Homes. Political Research Quarterly, Vol. 47 (4), pp. 969-984.

A paper examining how political and government institutional variables affect the siting or exclusion of group homes. Findings indicate that ward representation, which enhances constituency homogeneity, is strongly associated with the exclusion of group homes in municipal zoning ordinances.

Dear, M. (1992). Understanding and Overcoming the NIMBY Syndrome. Journal of the American Planning Association, Vol. 58 (3) pp. 288-300.

Considers typical opposition arguments and community attitudes to the siting of human service facilities, and discusses the range of strategies for comprehending and overcoming the NIMBY syndrome.

Energy Pathways Inc. (1994). Affordability and Choice Today - Case Study Project - Community Support for Affordable Housing : A Public Education Package. Ottawa, Ontario: CMHC

Describes an education package, including a video, a video vignette, a poster, and a speaker's kit, based upon information obtained from several focus group sessions with residents of Peel Brampton, Ontario, Asserts that such a package can reduce public resistance to affordable housing projects by dispelling public misconceptions about such projects, thereby facilitating the acceptance of such projects, encouraging regulatory reforms, and enabling development of innovative approaches to affordable housing.

Energy Pathways Inc. (1994). Affordability and Choice Today - Streamlined Approval Process Project - Case Study: A Management Strategy for the NIMBY Syndrome. Ottawa, Ontario: CMHC

A study by the Kings Square Non-Profit Housing Corporation, prompted by a NIMBY-motivated defeat of a proposal to establish a temporary shelter for the homeless in a residential Charlottetown neighbourhood, exploring people's attitudes towards social housing, for the purpose of forming a NIMBY management strategy. Concludes that the best way to confront NIMBY opposition is to be well prepared in advance. Includes the following recommendations: 1) Form a NIMBY committee, 2) Identify and minimize potential objections, and 3) Prepare for public meetings.

Farber, Stephen. (1986). Market Segmentation and the Effects of Group Homes for the Handicapped on Residential Property Values. Urban Studies, Vol. 23 (6) pp. 519-525. Examination of whether the existence of group homes (N=9) for the mentally handicapped affected neighbourhood property values, price levels, price increases, and length of time on housing market, in submarkets of Shreveport-Bossier City, Louisiana. Findings indicated that in high socioeconomic markets, the opening of a group home had no significant effect on housing prices, but may have increased the length of time it took to sell a house. In weaker socioeconomic areas, there was actually an increase observed in the price of houses. In both socioeconomic markets, the observed effects diminished with distance from the site of the group home.

Fisher, T. (1993). Perspectives: NIMBY. Progressive Architecture, Sept. 1993, pp. 88-90.

Discusses the frustration of an affordable housing project in Highland Park, Williamsburg, Virginia, due to NIMBY opposition. Suggests that emergence of NIMBYism has been unwittingly fed by the architectural and planning professions through their encouragement of neighbourhood preservation and participatory planning, but that it also provides the opportunity to reassert proper planning measures, and that doing so will help conflicting interests within a community find common ground, thereby eliminating NIMBY in the future.

Freudenburg, W. R., & Pastor, S. K. (1992). NIMBYs and LULUs: Stalking the Syndromes. Journal of Social Issues, Vol. 48 (4), pp. 39-61.

Considers the issue of public responses to technological risks from three main perspectives; ignorance/irrationality, selfishness, and prudence.

Gelman, S. R. et al. (1989). Impact of Group Homes on the Values of Adjacent Residential Properties. Mental Retardation, Vol. 27 (3), pp. 127-134.

Assesses the economic impact of locating small group homes in various single-family residential neighbourhoods. Findings confirm earlier studies refuting the notion that such homes have an adverse impact on the real estate values of adjacent properties.

Gilroy, J. M. (1991). Moral Considerations and Public Policy Choices: Individual Autonomy and the NIMBY Problem. Public Affairs Quarterly, Vol. 5 (4), pp. 319-332.

A philosophical examination of the NIMBY syndrome as a strategic confrontation between the public as a group of citizens, in a specific political jurisdiction, and the forces (industry etc.) who are suggesting the siting of a public work.

Jenks, D. (Ed.). (1990). "There goes the Neighbourhood . . . " A Summary of Studies Addressing the Most Often Expressed Fears About the Effects of Group Homes on Neighbourhoods in Which They Are Placed. CPL Bibliography 259, April 1990. Chicago, Illinois: Council of Planning Librarians.

Summarizes the major research addressing the effects of supervised residential care facilities on property values and quality of life in the neighbourhoods in which they are placed.

Schonfeld, R. L. (1990). Overcoming NIMBYs in Australia and the United States. Australia and New Zealand Journal of Developmental Disabilities, Vol. 16 (1), pp. .1-3.

A study of the strategies used in Australia for establishing community residences to see if any of those strategies could better effect community residence development in the United States.

Sellers, M. P. (1992). NIMBY: A Case Study in Conflict Politics. Public Administration Quarterly,
Vol. 16 (4), pp. 460-477.

An analysis of the policy-making techniques used by local governments for introducing unwanted public goods to a community as policy-making efforts related to interest group and activist input.

ABBEYFIELD ST. COLUMBA HOUSE SOCIETY

Oak Bay, British Columbia

Project Description: Purpose built, seven units, plus shared living, dining, and housekeeping..

Form of Tenure: Life-lease tenancy, sliding scale depending upon initial investment.

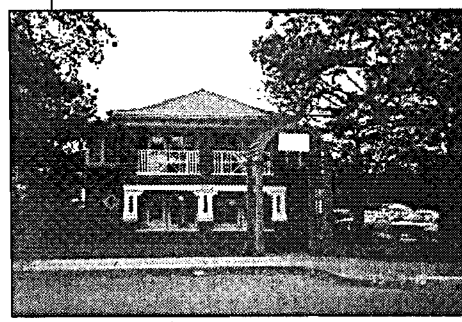
Residents: Single older residents of the local community, located through advertising, referrals from agencies, Church members.

Staff: One full-time resident homemaker, one relief homemaker.

Site/context: Distinct neighbourhood in a central metropolitan area, near shops and services.

Date of completion: December,1994.

Architect: Campbell Moore Group Architects Ltd., Victoria, B.C.



History:

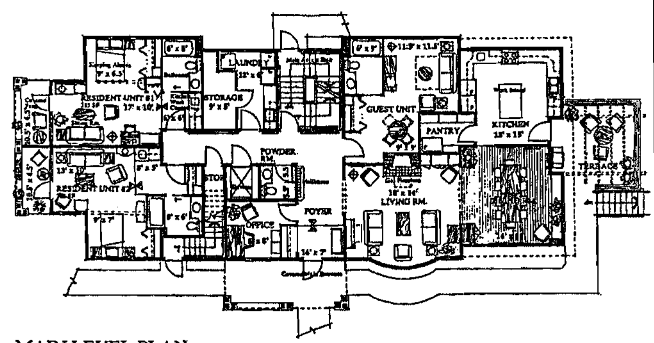
The Society arose out of the St. Columba Church membership in 1993. The Church already owned adjacent land and had the concept to provide housing. A previous plan for a 40 unit housing project on the site met with neighbourhood opposition. The society officially incorporated, for legal and financial reasons, in June 1994, when construction began. The house opened in January 1995.

Development Process:

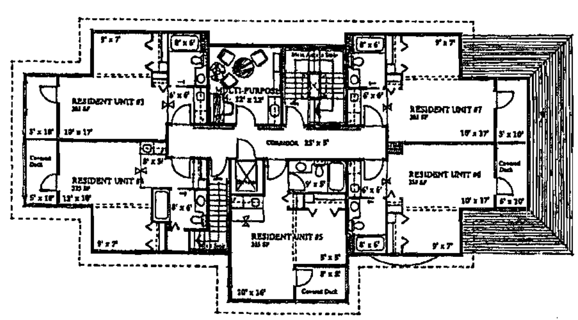
As the land was provided by the Church, the Society did not consider any options other than building new. Although viewed, other Abbeyfield projects had only minor influence on the design, which was inspired by local McLure heritage houses. Height limits, and the size of the lot constrained the project to 7 units, though more units may have eased the development costs born by the Church. Zoning bylaws required easements for the garden, and parking access. A bylaw amendment incorporated the definition of congregate housing into the Special Institutional Use designation. After extensive dialogue, aimed at preserving the community character, the Municipality and community were supportive.

Funding:

The land was provided through a lease arrangement with the Church, while the construction was financed primarily by the sale of five additional Church-owned properties. Private loans from members of the congregation provided the balance of financing. Individual church members also made donations. In a life-lease agreement, residents each purchase a "right to occupy", which may be partly mortgaged through the Society.



MAIN LEVEL PLAN



UPPER LEVEL PLAN

ABBEYFIELD HOUSE St. DAVID'S SOCIETY

Tsawwassen, British Columbia

Project Description: Two houses, purpose built, each with nine units plus shared living, dining, and housekeeping.

Form of Tenure: Rental.

Residents: Lower mainland seniors located through newspaper advertisements, and local public TV promotional video.

Staff: Three full-time resident housekeepers on rotating shifts.

Site/context: Somewhat isolated from shops and public transportation; quiet neighbourhood in suburban metropolitan area, adjacent to Church amenities.

Date of completion: House one - July 1, 1992; house two - January 1, 1995.

Architect: Lawrence Haave Architect, Surrey, B.C.

History:

The incentive for this Society to form came through St. David's Church, which had land available and wanted to use it for some community purpose. One of the original board members had encountered the Abbeyfield concept in 1990 when visiting an Abbeyfield house under construction in Saanich. The society officially formed in the fall of 1991, and affiliated with Abbeyfield Canada shortly thereafter.

Development Process:

The project was originally intended to be one nine unit house, but the Society was advised that they could get more value from the land by building two houses with nine units each. Visits to two other Abbeyfield projects did have some influence on the design. The local community also had design input, specifying certain features to ensure neighbourhood compatibility. Most of the neighbours were supportive after viewing the final design. Previously zoned for church hall use, the site had to be rezoned for comprehensive development.

Note: No floor plans available for publication

Funding:

With the approval of the Diocese and the parish, the land was leased to the Society for a nominal amount, for 75 years. Start-up costs were covered by a BCHMC grant of $20,000, split between the two phases. Donations also came from individual parishioners, the local community, the Church Outreach Department, the Senior's Lottery, and other foundations. Another Abbeyfield society had advised that private funding entailed fewer constraints than Government funding sources, thus, the bulk of financing was sought through a 25 year mortgage with the Delta Credit Union, which was a strong community supporter.

APPENDIX A

Case Study Project Profiles

ALBERNI-CLAYOQUOT CONTINUING CARE SOCIETY

Port Alberni, British Columbia

Project Description: Existing house to be renovated to respite or sheltered housing.

Form of Tenure: Not yet determined, possibly rental.

Residents: To be frail elderly from the Alberni Valley.

Staff: Still to be determined.

Site/context: Residential neighbourhood with older population, in medium-sized city.

Date of completion: Still to be determined.

Architect: Preliminary consultation only; Jake Van Vliet Architect, Port Alberni, B.C.

History:

The Steering Committee for this project formed in April, 1994, as an executive committee of the Alberni-Clayoquot Continuing Care Society. The house had been bequeathed to the Society by the Watson Estate, for the purpose of accommodating elderly persons in need in the Alberni Valley. The goal of the Society is to make best use of this beautiful older home, and the Abbeyfield model is considered to be a worthwhile option. The Society became familiar with the Abbeyfield concept as well as other options, through a seniors' housing society. The Society affiliated with the Abbeyfield Houses Society of Canada in November, 1994.

Development Process:

Assessments are still being made to determine both the need in the area, as well as the suitability of the site location. The further development of this project will likely consist primarily of updating the house for basic safety and accessibility requirements, rather than a major reconstruction. The society intends to carry out the design and renovation process themselves, with the support of a contractor. In keeping with the intended use of the house, the population of the neighbourhood is also aging, and no opposition is anticipated from the community.

Note:
No floor plans of heritage house available

Funding:

The Society was given clear title to the house, and also has the option of mortgaging the house for a cash value. Some other donations have also been made, although the society has not yet engaged in any active fund-raising. The Society anticipates that some Government funding will be received to cover professional staffing and residential care. Interest from an endowed trust will be used to maintain the house.

EMERALD ESTATES

P a r k s v i l l e, B r i t i s h C o l u m b i a

Project Description: Eight-building complex, purpose built, nine units each with shared common kitchen, dining and fireside lounge.

Form of Tenure: Strata-title condominium; units are pre-purchased.

Residents: Eight residents per complex.

Staff: One full-time resident homemaker per house.

Site/context: Central location in small, rapidly growing town, with a significant seniors population.

Date of completion: Phase 1 - Winter 1994.

Developer: Radcliffe Development Corporation, Parksville, B.C.

Note: No unit floor plans available

History:

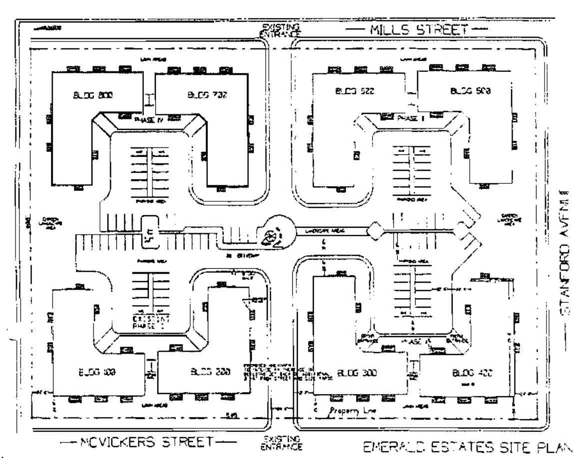
The interested parties came together for this project in 1992, although no official housing society was ever formed. Inspired by similar projects that were built in California and Seattle, the intent was to provide semi-sheltered seniors equity housing. Another impetus for the project was a particular market niche in Parksville; 75% of the population is retired. The group became aware of the Abbeyfield model in 1993, which influenced the inclusion of homemaker services in each house cluster.

Development Process:

The originator of the group had previously been involved in the private development of two other similar, although smaller projects. This project was a market oriented development inspired by these earlier experiments. The developer was responsible for the design as well as the construction. Each of the eight phases repeats the same footprint. The community was generally in favour of the project as it was deemed to serve a need. The City was also very supportive and no public hearing was required, because the property was down-zoned from a commercial use, to comprehensive development. A traffic study of the area was prescribed by Council, as some residents were concerned about the possibility of increased traffic, but these concerns were proven unfounded.

Funding:

After the developer purchased the property, construction funding for each phase has been provided through a bank loan. Approval of project financing required that each phase be 25%-50% pre-sold prior to commencement of construction. Marketing of successive phases was easier once earlier models were completed.



St. JOHN the DIVINE ABBEYFIELD HOUSE SOCIETY

Courtenay, British Columbia

Project Description: To be purpose built, 10 units, shared living, dining and housekeeping.

Form of Tenure: Rental

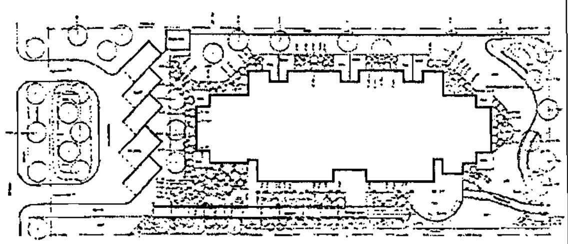
Residents: To be from local community.

Staff: Currently consulting other Abbeyfield societies regarding job descriptions.

Site/context: In small town, close to central area; accessible public transportation.

Date of completion: 1997.

Architect: Trudy Rotgans, MAIBC, Courtenay, B.C.



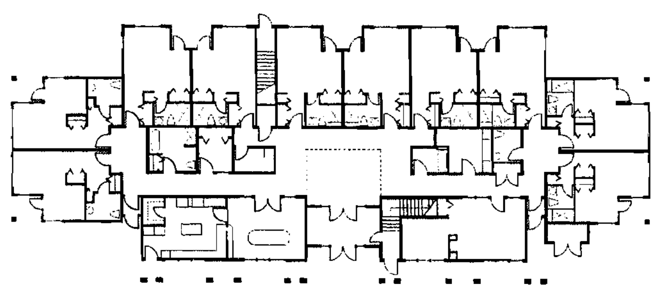
SITE PLAN

History:

A donation of $50,000 from a St. John the Divine parishioner provided the impetus for this Society to form in 1991. The parishioner had seen a newspaper article about the Abbeyfield House in Sidney, and felt that there was a similar need for such a project in their community. Others at the Church had also been aware of the Abbeyfield concept before this time.

Development Process:

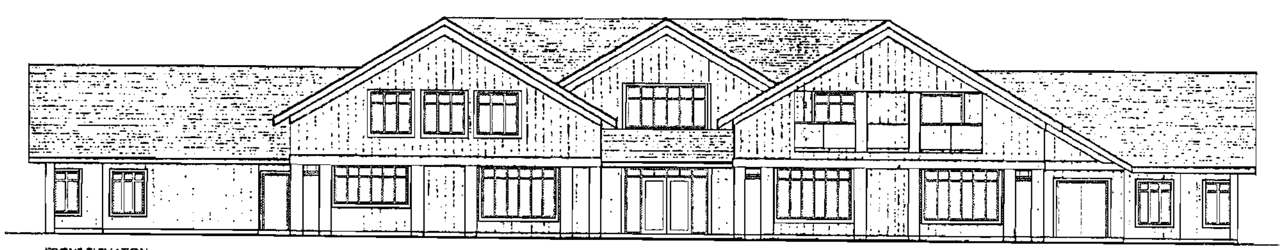
This project was in the planning stages for three years prior to the beginning of design. Much of this time was spent in trying to locate an appropriate site for the project. Initially, a Church owned property was considered, but was determined to be too remote from the town, and thus not in keeping with the Abbeyfield ideal of being within the community. Instead it was decided that the Church would sell the property, and contribute 10% of the proceeds toward the Abbeyfield project. The Society was assisted in the subsequent search for a site by the City, which provided the land, already appropriately zoned, at a reasonable price. It was decided that design proposals would be invited from local architects/designers only. The design was generally inspired by visits to other Abbeyfield projects.



MAIN FLOOR PLAN

Funding:

In addition to the original $50,000 donated by an anonymous parishioner, further donations of $10,000 were also received. Aside from this, the Society is not actively carrying out local fund-raising. The Society has also not applied for any government assistance, but intends to finance the project entirely with private funds.



FRONT ELEVATION

St. ANDREW'S ABBEYFIELD HOUSING SOCIETY

Sidney, British Columbia

Project Description: Purpose built sheltered group home; nine units with shared living, dining, and housekeeping.

Form of Tenure: Rental

Residents: Nine single, frail elderly residents; most referred by non-profit housing agencies.

Staff: One full-time resident housekeeper; two relief housekeepers.

Site/context: In a small town, within walking distance of senior oriented services, and the main shopping street.

Date of completion: Winter 1987.

Architect: Benjamin Bryce Levinson Architect & Planners, Victoria, B.C.

History:

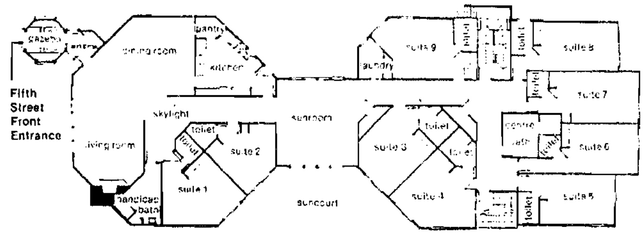
The Society formed in 1986, galvanized by interested individuals within the St. Andrew's Church congregation. The house was developed as a non-denominational community undertaking in the retirement town of Sidney, just outside of Victoria, B.C. This was the first Abbeyfield project in Canada, and as such had no role models other than U.K. Abbeyfield projects. It thus set new precedents for the standards of Abbeyfield houses in Canada.

Development Process:

Provincial funding required that a needs assessment survey be carried out in the community, and financial feasibility was determined by the potential income relative to the mortgage cost. Site selection criteria were determined by the board members, and land was purchased with the assistance of a realtor on the board. The society had considered a renovation project, but determined that this option would not be economical in the long-run. The site was rezoned from single family residential to institutional since no other existing zoning definition would accommodate this novel use.

Funding:

As the first Abbeyfield in Canada, this project received the benefit of provincial Ministry of Housing funding. The Society also actively engaged in fund-raising; donations were received from a number of individuals and foundations.



Schematic Floor Plan the Main Floor

St. MARTIN ABBEYFIELD HOUSING SOCIETY

Saanich, British Columbia

Project Description: Purpose built sheltered group home, twelve units plus shared living. dining and housekeeping..

Form of Tenure: Rental

Residents: Advertised through long term care nurses and churches; has waiting list.

Staff: One full-time resident house-mother, 3 part-time relief house-mothers.

Site/context: Suburban metropolitan, mixed community, accessible public transportation.

Date of completion: 1991.

Architect: Raymond Goldsworthy Architect Ltd., Victoria, B.C.

History:

The society first formed in 1985, under the strong leadership of the current chair of the B.C. Chapter of Abbeyfield Canada, with support from the St. Martin's Church congregation and other concerned members of the community. The impetus was that Saanich had many seniors living alone on low incomes. At the time, no other Abbeyfield project had yet been completed in Canada, but members had visited Abbeyfield houses in the U.K. The society also has affiliations with several local service clubs. The society incorporated and became affiliated with Abbeyfield Canada in 1990. The house opened in 1991.

Development Process:

The site is leased from the City of Saanich, chosen from ten properties that were offered by the Municipality. Initially the site was not large enough to accommodate the 12 units required for financial feasibility, until the Municipality arranged to purchase an additional adjacent piece of land, which was also leased to the society. The design was not influenced by other Abbeyfield projects, as none had yet been completed in Canada. The site was rezoned from single family residential designation (R-1) to institutional (P-3) in order to accommodate the increased density. Both the Municipality and the community were supportive of the project.

No floor plans were available for this project

Funding:

The primary source of funding for this project was a CMHC insured mortgage. In the lease arrangement with the Municipality, the society was billed up front for 40-50 years; this amount was also written into the mortgage. Donations were received from various individuals, societies and clubs. In addition, local casino events provide an on-going source of fund-raising.

HERITAGE HOUSING SOCIETY ABBEYFIELD HOUSE

Victoria, British Columbia

Project Description: Heritage renovation, ten units plus shared living, dining, and housekeeping.

Form of Tenure: Rental (originally to be equity co-op)

Residents/Staff: To be young to older seniors from the greater Victoria area; .

Site/context: Centrally located in distinctive central metropolitan neighbourhood.

Date of completion: 1997

Architect: Finola Fogarty, MAIBC, Architect, Victoria, B.C.

Development Consultant: Hilary Stewardson, Victoria, B.C.

History:

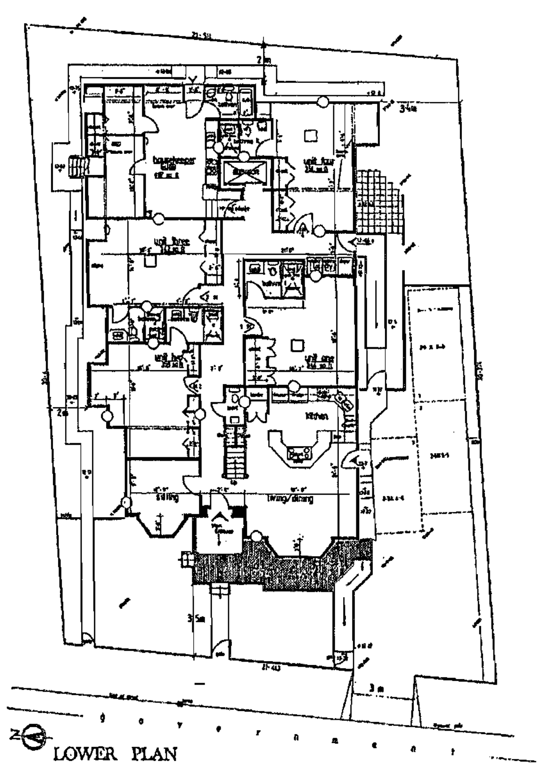
The Society first formed in March, 1992 as the Good Companions Abbeyfield Housing Cooperative. Originally conceived as an equity co-op, the project encountered some difficulties as a result. As a co-op, the project was not eligible to be registered with Revenue Canada as a charity, thus limiting potential fund-raising. The project has since been re-established for rental accommodation. Incorporated in February, 1996, the Abbeyfield Heritage Housing Society has registered charitable status.

Development Process:

Several organizations were applied to for help in the search for property. A heritage building was offered by the Province, with the stipulation that it be moved to a different site. The Provincial Government provided a site through a lease arrangement. The site's zoning allows for use as a "Boarding House". The James Bay area Development Permit process required the approval of the Victoria Accord, and a strike at City Hall contributed to the delay. There were also difficulties in bringing the house up to accessibility standards, due to its heritage designation.

Funding:

CMHC provided a forgiveable start-up loan. Initial fund-raising attempts were received negatively, in large part due to the original equity co-op status. A large donation by a former society member which had been earmarked for subsidy of two units, has since contributed to establishing the new non-profit society. A CMHC insured mortgage had required financial commitments from 8 out of 10 future co-op residents, which proved difficult to secure at any one point in time. This condition no longer applies now that the project will be developed as a rental Abbeyfield house. This should facilitate project completion, though financing details are still being worked out. The land lease payment of $125,000 has been deferred until occupancy.



ABBEYFIELD HOUSES of VANCOUVER SOCIETY

Vancouver, British Columbia

Project Description: Two houses, one heritage renovation, one new, 9 units each with shared living, dining, housekeeping.

Form of Tenure: Rental

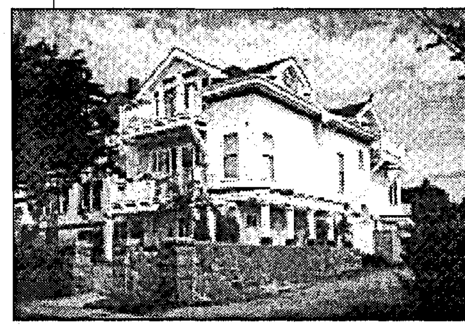
Residents: Single frail elderly from lower mainland located through seniors centres, churches, health units, physicians.

Staff: Two full-time resident housekeepers, two part-time relief housekeepers.

Site/context: Central metropolitan location, close to seniors services & amenities.

Date of completion: September, 1993.

Architect: Charlotte Murray, Iredale Architecture & Engineering Ltd., Vancouver, B.C.



History:

The Society officially formed in 1985, and affiliated with Abbeyfield Canada early in 1986. It had initially emerged under the sponsorship of the St. John's Shaughnessy Church, however, at that time there was no provision in the City bylaws for this housing model. After being held up at the planning department, the St. John's group eventually dissolved, but the City was inspired to amend the bylaw, and with support from the City of Vancouver, a new Society was established.

Development Process:

The Municipal Housing Department continued to play a major role in the development of this project. The president of the Society also had an interest in heritage issues, and having spotted the house, approached the City about using it for the Abbeyfield project. As the City was always considering opportunities for saving heritage buildings, as well as housing special needs groups, it purchased the house for the project. The City also assisted the board in hiring an architect, and determined that the project would require two houses, in order to be economically feasible. Rezoning occurred mainly to accommodate the two houses on the site, and also to designate the house as a heritage property.

Funding:

Fund-raising was carried out by Society members, and donations were received from many organizations. B.C. Housing Management Commission provided a start-up grant, and due to the re-use of the heritage building, the Heritage Fund also made a contribution. The majority of the funding was provided through investment by the City, which has a lease arrangement with the Society.

Note: No floor plans available for publication

ABBEYFIELD SOCIETY St. MARGARET of SCOTLAND

Burnaby, British Columbia

Project Description: Two purpose built houses, each with 10 bed-sitting suites, and shared living, dining and recreation areas, central entry and elevator.

Form of Tenure: Rental

Residents: To be healthy seniors from the local community.

Staff: Live-in house co-ordinator and relief co-ordinator.

Site/context: In metropolitan area; adjacent to Church, close to public transportation and shopping.

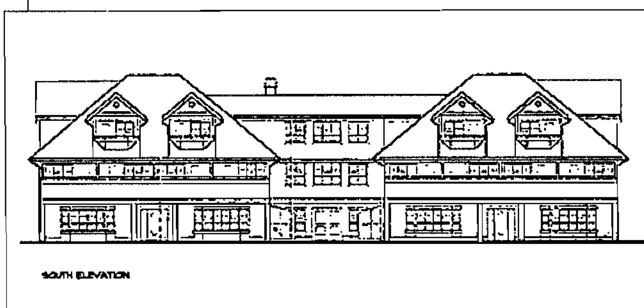
Date of completion: November, 1996.

Architects: Linda Baker Architect Inc., Vancouver, B.C. / Hugh Shirley, West Vancouver, B.C.

Project Management: Novac Contracting, Abbotsford, B.C.

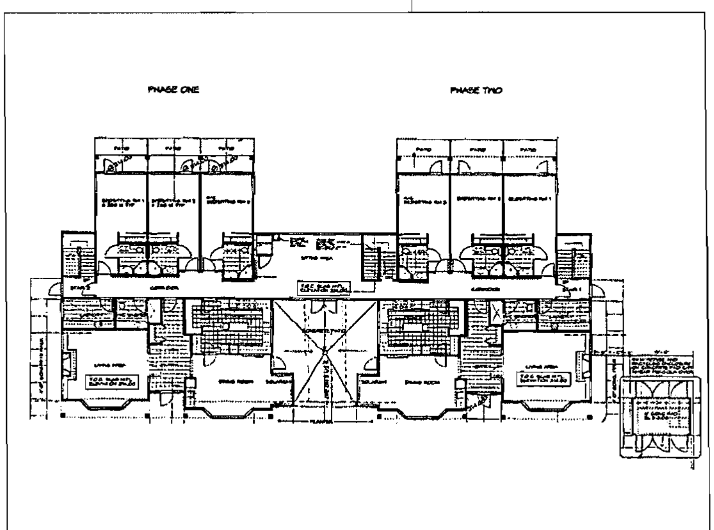
History:

Initial interest in building an Abbeyfield in Burnaby was shown by members of the St. Margaret's congregation in 1992, and after meeting with the St. David's Society in Tsawwassen, the St. Margaret's Society was officially formed. In partnership with the Abbeyfield Society, the Burnaby Centennial Lions Club contributed $100,000 to get the project started. The site adjacent to the Church has been leased to the Society for 60 years from the Anglican Diocese of New Westminster. The first house was completed in November, 1996.



Development Process:

This project has been in development since 1992. In order to be financially viable, and to make best use of the site, it was determined that two houses should be built. Several other Abbeyfield Houses in B.C. were visited. In particular, the design was influenced by St. David's Abbeyfield which has two adjacent houses also on land leased from the Diocese. The contractor has also taken on the role of project manager. The onset of construction was delayed somewhat due to the complexity of rezoning the site to accommodate its new use. The houses will be built in two phases, contingent on filling the first house. Significant interest from potential residents living in the community has been generated.



Funding:

As noted above, the initial funding came from the Burnaby Centennial Lions Club. The Lions Club has since committed to a second donation of $100,000 for fixtures and furnishings. Additional financing arrangements have been negotiated with a pension fund.

HILLTOP MANOR

Langley, British Columbia

Project Description: Congregate care residence, purpose built, 10 units with shared living, dining and housekeeping.

Form of Tenure: Rental

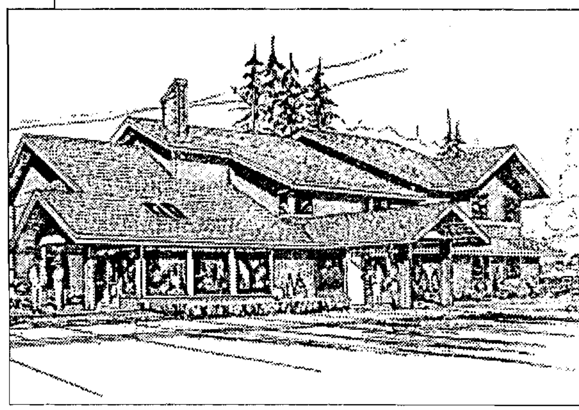
Residents: Single frail elderly from local and afiliated church congregations.

Staff: One full-time resident housemother, one part-time relief.

Site/context: An expanding neighbourhood within a metropolitan suburb.

Date of completion: December, 1994.

Architect: Lawrence Haave Architect, Surrey, B.C.



History:

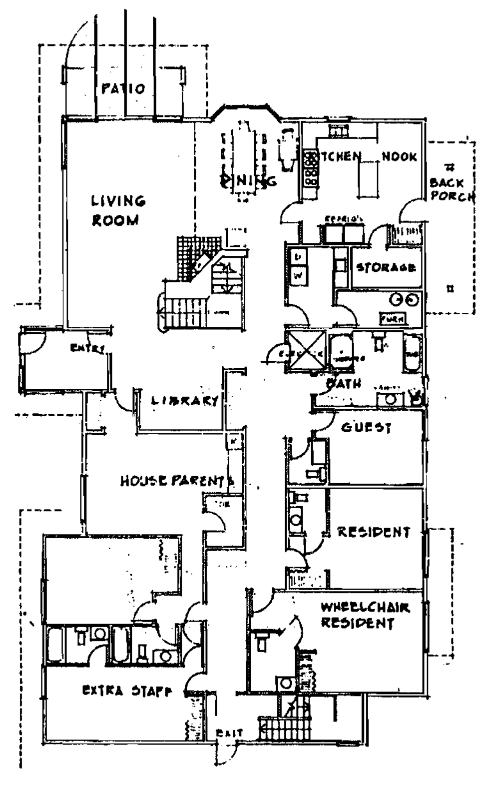
The Langley Gospel Home Society formed in 1987 for the purpose of using land owned by the Church to establish a seniors' rest home. The board is made up of members from six different local Gospel Churches. The project was in-part inspired by a project built by another church, and in-part by the St. Andrew's Abbeyfield in Sidney. Although the Society liked the housing concept, they did not affiliate with the Abbeyfield Society.

Development Process:

The Church had owned the land since 1970. The Society wrote a Letter of Intent to the Municipality in 1988, and in 1989 the site became eligible for subdivision. A land swap was then arranged with a developer, to improve the location. The architect was retained early in the development process, having been recommended due to previous experience with other seniors care home projects. A visit to the Sidney Abbeyfield had some influence upon the design of this project. Newsletters were distributed, and a public hearing held to inform the local community about the project. No opposition was made, and no rezoning was required. The project was four years in construction, as it was built primarily with volunteer labour.

Funding:

The project was funded mainly through donations received from various churches. As the land is leased from the Church for $1/year, for a term of 99 years, funds were required primarily for construction and consultant fees. As noted above, volunteer labour kept costs down. No government funding was sought, and no other loans or mortgages were arranged. Fundraising is ongoing.



ABBEYFIELD HOUSES SOCIETY of KELOWNA

Kelowna, British Columbia

Project Description: Renovation, seven units with shared living, dining, and housekeeping

Form of Tenure: Rental.

Residents: Seven single frail elderly residents; referred by local hospital, public health unit.

Staff: One full-time house-manager, two part-time relief house-managers.

Site/context: Single family residential neighbourhood, in medium-sized city.

Date of completion: Three additions were made, in 1990, 1993, & 1995.

Architectural Consultant: Peter J. Chataway, Kelowna, B.C.

History:

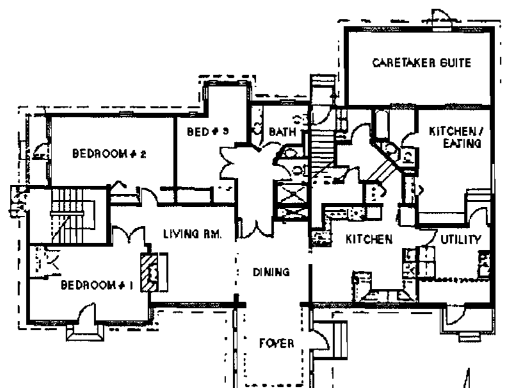
The Kelowna House was the second Abbeyfield House to be established in Canada. The Society was incorporated in November, 1985. The Director had been introduced to the Abbeyfield concept in England, in 1984. Developed almost simultaneously with the Sidney Abbeyfield House, there were likewise only U.K. examples from which to draw precedents at the time. Affiliation with the Abbeyfield Houses Society of Canada came in June 1986.

Development Process:

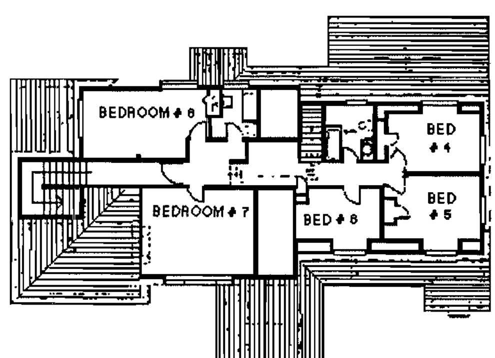
This project was a renovation of an existing house, much like most U.K. Abbeyfield houses. The house was purchased in 1986. It required fairly extensive modifications which were carried out in several stages. Zoning was not a factor in the site selection as there was no existing zone that would have accommodated this use at that time. The City altered bylaws in order to accommodate this new use under the designation R9A, which is defined as a Residential Group Living Home. As there is no pre-zoned R9A land, all such applications require rezoning, and must be sponsored by a registered non-profit society. After some initial apprehension, neighbours were supportive of the project.

Funding:

The Society engaged in planning and fund-raising for one year before commencing with the project. As well as several grants, a forgiveable CMHC loan, and a large private loan, the society received many donations, both solicited and unsolicited, from various sources. The society continues to raise funds for ongoing renovations through local bingo and casino events.



MAIN FLOOR PLAN



UPPER FLOOR PLAN

ORCHARD CITY ABBEYFIELD SOCIETY

K e l o w n a, B r i t i s h C o l u m b i a

Project Description: Renovation and addition, nine units and shared living, dining and housekeeping

Form of Tenure:: Rental.

Residents: Local seniors located through community broadcasts and referrals from Kelowna Abbeyfield.

Staff: One full-time resident house manager, one part-time relief house manager.

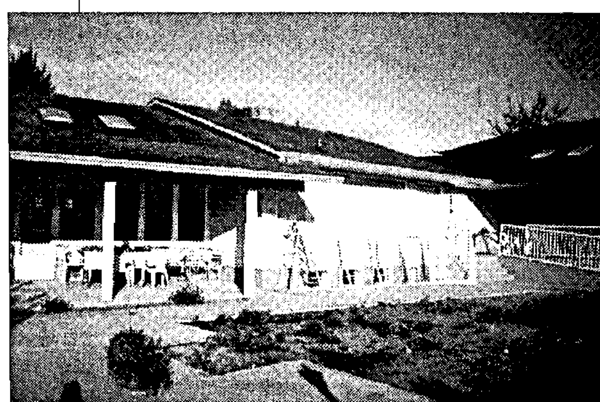
Site/context: Centrally located in medium-sized city, close to amenities and transportation.

Date of completion: Summer, 1995.

Architect: Greystokes Design, Kelowna, B.C.

History:

Impressed with the concept and success of the Kelowna Abbeyfield House, a donor came forward with a contribution of $150,000 to start up another Abbeyfield House in the Interior of B.C. This led to the formation of the Orchard City Society in April, 1993, and affiliation with the Abbeyfield Houses Society of Canada. Two of the Society members had also been involved in the formation of the Kelowna Abbeyfield. The original donor remained a member of the Society, and other members also had local service club affiliations.



Development Process:

The major obstacle in the development of this project was in locating a suitable site. Although the society would ideally have preferred to build the project new, finding a vacant lot proved difficult. Prior to locating the current site, another site had been chosen and rezoned, but neighbourhood opposition and inadequate parking prevented the project from going ahead. With the assistance of a board member who was also a licensed realtor, another site was eventually located. In order to avoid the previous complications, the local community was informed through a door-to-door survey and a public hearing. The site was rezoned from single family residential (R-1) to (R-2). Due to some unexpected repairs the renovation proved to be more expensive than anticipated.

Note: No floor plans available for publication

Funding:

As noted above, a $150,000 donation provided the initial funding for the project. While the Society did attempt to raise additional funds by soliciting donations from other individuals and organizations, the balance of financing was provided through a mortgage with the Interior Savings Credit Union. A board member provided financial planning assistance.

ABBEYFIELD HOUSES of VERNON SOCIETY

Vernon, British Columbia

Project Description: Renovation and extension, to be eight to ten units with shared living, dining and housekeeping.

Form of Tenure: Rental.

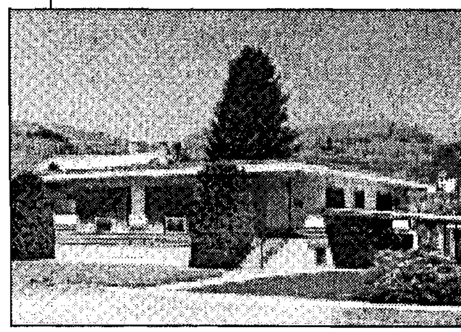
Residents: To be seniors from the local community; there is a waiting list of interested residents.

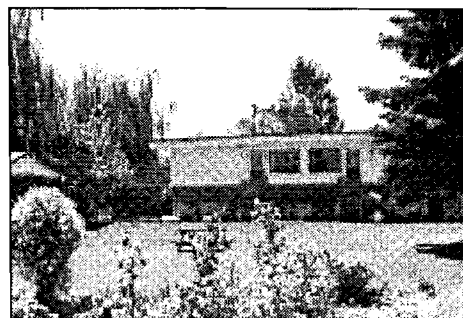
Staff: Will have one full-time resident housekeeper, one relief housekeeper.

Site/context: Established neighbourhood in small town, close to recreational amenities, seniors' centre, and shopping.

Date of completion: Anticipated completion of renovations - 1997.

Architect: Charles Wills Architect, Vernon, B.C.





History:

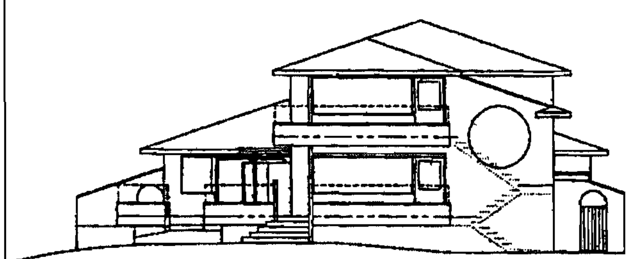
This Society formed in June, 1993, after one of the originating members was introduced to the Abbeyfield concept through the Kelowna House. Another founding member had relatives living in an Abbeyfield in the U.K. The Society affiliated with the Abbeyfield Houses Society of Canada in July, 1993. One of the original Kelowna Abbeyfield Society board members was involved in the project as a development consultant.

Development Process:

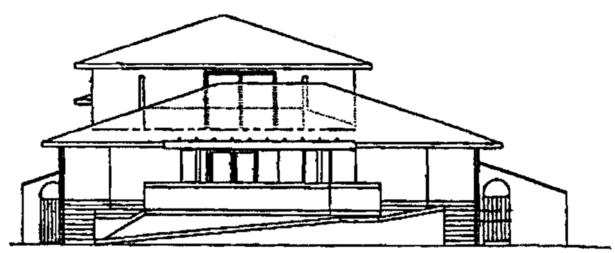
A house search committee viewed almost 50 sites. Location and existing zoning were the main considerations. The committee would have liked a heritage home, but felt that the locations were not as good, and that it would be more difficult to renovate. The existing house on the site chosen was retained, as zoning bylaws and building codes have become more restrictive since the original house was built. No rezoning was required, but the Municipality is working on general zoning bylaw revisions to address the needs of different groups. The community was informed about the project through local newspapers, television and public presentations, and was generally supportive.

Funding:

A grant of $10,000 from B.C. Housing Management Commission, a $20,000 donation from Kalamalka Rotary Club, many fund-raising events and other community donations covered start-up costs and the property downpayment. The land purchase was primarily financed through a mortgage with The Valley First Credit Union. Fund-raising is ongoing, with a goal of $350,000, allocated for renovation and expansion. The initial consultation with the architect was "won" in a charity auction, and it is also hoped that some supplies and labour will be donated. As well, a grant of $40,000 is anticipated from the Vancouver Foundation.



NORTH ELEVATION



SOUTH ELEVATION

Note: No floor plans available for publication

EAGLE VALLEY SENIOR CITIZENS HOUSING SOCIETY

Sicamous, British Columbia

Project Description: Purpose built, nine units with shared living, dining and housekeeping.

Form of Tenure: Rental.

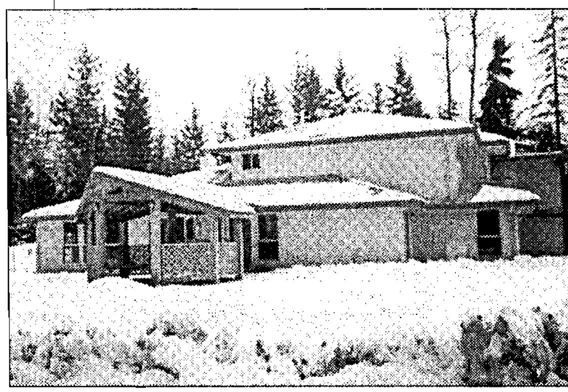
Residents: Seniors from local area, identified through needs assessment survey.

Staff: A full-time housekeeper - manager, one relief & residential housemother / social convenor.

Site/context: Central location, close to amenities and other seniors' housing, in rural community.

Date of completion: 1996.

Architect: Benjamin Bryce Levinson Architect & Planners, Victoria, B.C.



History:

The Housing Society originally formed in 1975, in response to a perceived need for seniors' housing in the Eagle Valley. The "Lodge" project was begun in 1990. Although the society is not affiliated with the Abbeyfield Houses Society of Canada, the project is modelled after the Abbeyfield concept, as it was felt that this type of housing filled a gap between intensive care options and independent units. The concept was first encountered by the Society in 1990, when visiting the St. Andrew's Abbeyfield House in Sidney, B.C.

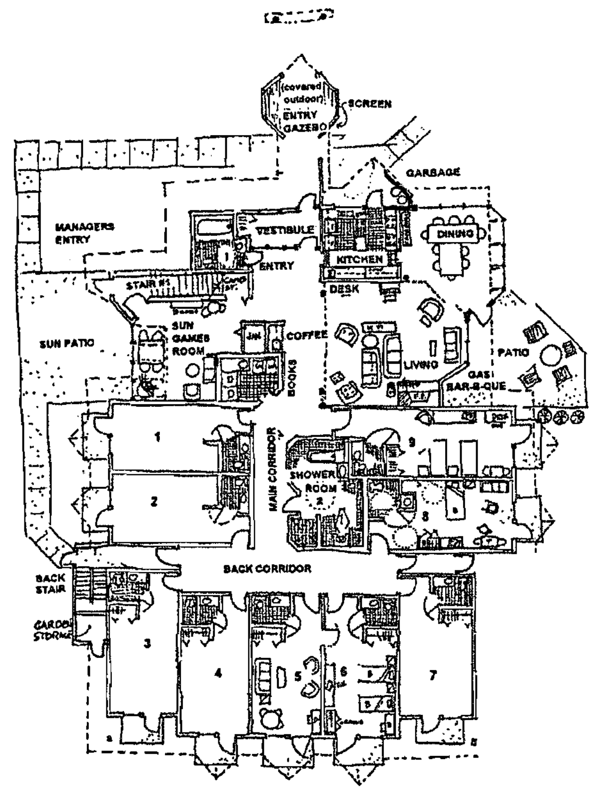
Development Process:

Owned by the Society since 1975, the site is part of a nine acre parcel, purchased to be developed specifically for seniors' housing. It is ideally located amongst other seniors' amenities and services. The site was already zoned appropriately, as part of a total plan for the town, when it incorporated in 1989. Taxes were waived, and sewer hook-up was donated. The architect came recommended by St. Andrew's. The community was informed about the project through the local newspaper, and public meetings. A needs assessment survey resulted in a waiting list of potential residents.

Funding:

The Society had accumulated $60,000 in donations between 1986 and 1992, termed the "Furnishing Fund". With the consent of the Society's general membership, this fund was transferred to the "Lodge Fund". Active fund-raising is ongoing, with contributions from service clubs and many local businesses. Further financing was also arranged through a CMHC insured mortgage with the Bank of Montreal.

MAIN FLOOR PLAN



ROY RESIDENTIAL CARE HOME

W i n n i p e g, M a n i t o b a

Project Description: Purpose built residential care home, 6 units.

Form of Tenure: Rental.

Residents: 6 residents, elderly from local community who are unable to safely live independently, referred by Resource Coordinator for catchment area.

Staff: Owners are also operators, no additional staff recruited.

Site/context: Quiet residential neighbourhood, close to services, amenities and public transportation.

Date of completion: September, 1991.

Architectural Consultant: Pedro Chagas, M.Arch.

History:

Under the guidance of Winnipeg Health and Family Services, the Residential Care Home concept began by adapting existing housing in older neighbourhoods, to provide supportive housing for seniors who still desire access to community and recreational resources but require some assistance from a care provider. The owner/operators of this facility first became interested in the concept in 1989, but intended to introduce something new to the idea, by developing it as a purpose built project.

Development Process:

Working closely with the Health and Family Services Resource Coordinator, a potential owner/operator goes through a process of proposal development, training and licensing, in which the intended structure must meet the required physical standards. Having researched other residential care facilities, the owner/operators in this scenario felt that most facilities, as modified older structures, were physically inadequate, and that it would therefore be better to build a new structure. The site was chosen based upon site location criteria provided by Health and Family Services, and also specifically to ensure that zoning issues would not be a problem. However, some neighbourhood opposition was encountered, which had to be resolved in court. This delayed the opening of the project somewhat, but for the most part, it has now been accepted within the community.

Funding:

The residential care home is essentially a private venture; as such, the owner/operator is entirely responsible for financing the project. In this case, the owners sold their previous home, and also took out an additional mortgage for financing. No additional fund-raising was carried out; no donations or government subsidies were received. Resident fees cover monthly operating and maintenance costs.

Note: No drawings or photographs available for publication.

ABBEYFIELD HOUSES SOCIETY of TORONTO

Scarborough, Ontario

Project Description: Purpose built, ten units with shared living, dining, and housekeeping.

Form of Tenure: Rental.

Residents: Single frail elderly located through referrals and advertising in local papers.

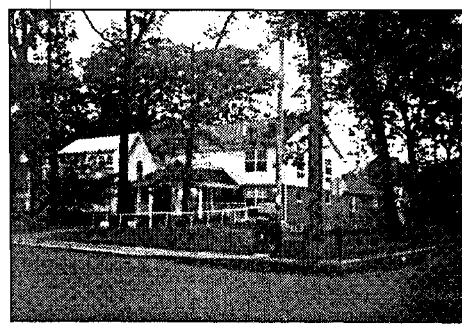
Staff: One full-time housekeeper, two part-time relief housekeepers.

Site/context: Located outside the central metropolitan area; close to public transportation.

Date of completion: 1992.

Architect: Robert Reimers and Associates, Architects Ltd., Toronto, Ontario.

Development Consultant: Gibson and Associates Ltd., Toronto, Ontario.



History:

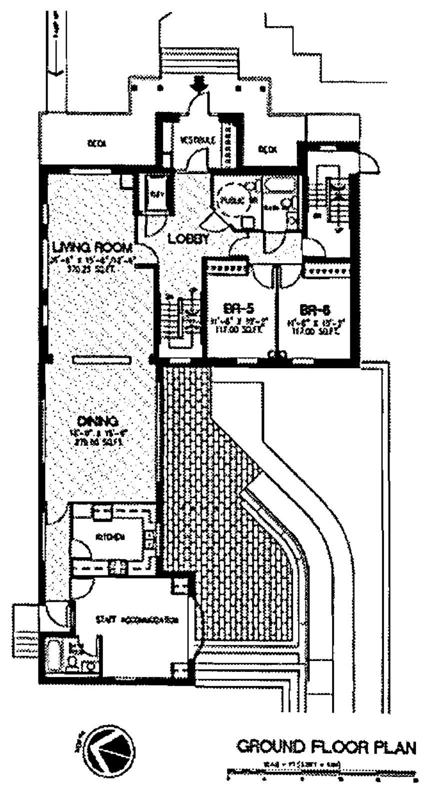
This Society arose from the Canadian Society, in 1987, when it was determined that there should be a house near the head office in Toronto. One of the originators was very familiar with Abbeyfield projects in the U.K. The board members worked closely with the architect in the design of the project.

Development Process:

A property holding company assisted in the site search. The architect advised the society to choose a site that would not require rezoning, in order to avoid delays. Many sites were considered, including possibilities for renovation. The design concept was slightly influenced by visits to four U.K. Abbeyfields. The intended use conformed to the Municipality's definition of a Group Home, and so rezoning was not necessary. Through public presentations, the local community was able to have some input into the final design of the project.

Funding:

The development consultant made an application for funding to the Ministry of Housing. A per unit allotment was received for 11 units. A 100% guaranteed mortgage was provided by CMHC for a term of 35 years. Also, a $10,000 grant for furniture was received from a local foundation. Some individuals made donations for start-up costs, and additional funds were provided by the National Abbeyfield Society from bingo fund-raising events.



ABBEYFIELD HOUSES SOCIETY of OTTAWA

Ottawa, Ontario

Project Description: Renovation and addition, nine units with shared living, dining, and housekeeping.

Form of Tenure: Rental.

Residents: Single frail elderly from the local community.

Staff: One full-time resident housekeeper, two part-time relief staff.

Site/context: Urban, identifiable community; close to shops and services.

Date of completion: 1996.

Architect: Douglas Hardie Architect Inc., Ottawa, Ontario.

History:

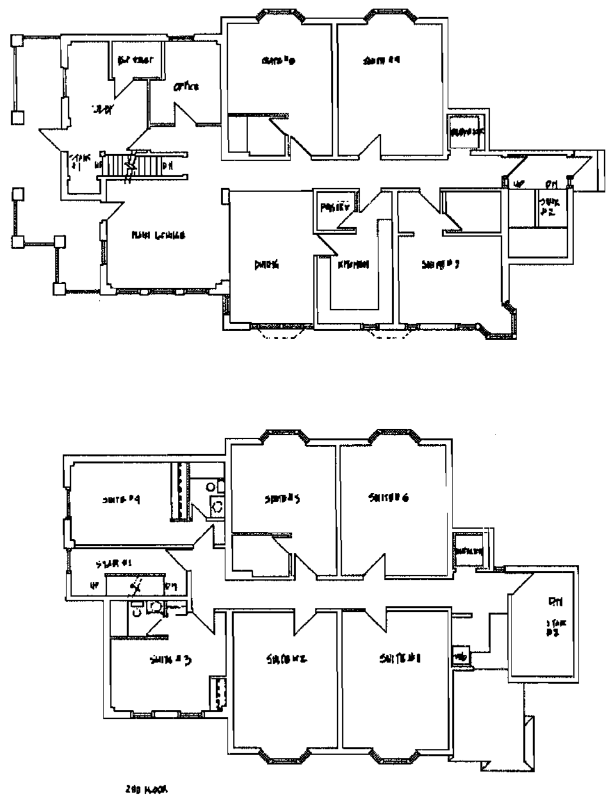
The Society formed in 1991, initiated by an individual who knew of the Abbeyfield concept. Presentations were made at local community centres to generate interest in forming the society. Some members of the society are affiliated with the local Kiwanis service club. The Society joined Abbeyfield Canada in January, 1991.

Development Process:

The major difficulty for this project lay in locating a site, but after some time, the Parkdale United Church came forward with a property they were considering selling for a community-oriented purpose. After a presentation to the congregation, the site was purchased and eventually subdivided. The existing 90 year old home will be renovated and extended. Though initially intended to have eight units, a simplified architectural structure which may permit 10 units is now being considered. The design follows guidelines set by B.C. and Ontario Abbeyfield houses. The intended use conforms with the existing institutional zoning.

Funding:

Organisational start-up grants came from the Community Foundation of Ottawa-Carleton and New Horizons. Funds towards the building consisting of donations and interest-free loans total $160,000, including $50,000 for the installation of an elevator/lift. Donations of materials and labour have been promised by business and volunteer groups. An insured mortgage of $450,000 is available through a commercial bank loan, however, a difference of about $70,000 has still to be resolved.



ABBEYFIELD HOUSES SOCIETY of PORT HOPE

Port Hope, Ontario

Project Description: Renovation, five units with shared living, dining, and housekeepig.

Form of Tenure: Rental.

Residents: Single frail elderly; eligibility is based on income and medical certification.

Staff: One full-time housekeeper, two part-time assistants who work alternate weekends.

Site/context: Residential neighbourhood in small town, close to churches and main shopping street.

Date of completion: November, 1989.

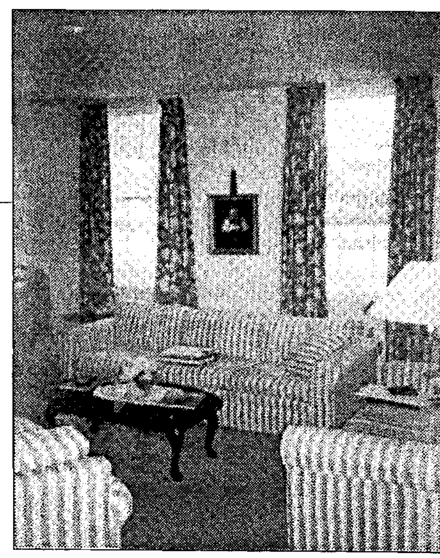
Development Consultant: Totten Sims Hubicki Associates, Cobourg, Ontario.

History:

This society grew out of an Anglican church group, after one of the original society members saw an article on U.K. Abbeyfields, and determined that there was a need for this type of housing in their community. The society affiliated with Abbeyfield Canada in Fall, 1987, and became incorporated in June, 1989. The house opened in January, 1990.

Development Process:

A needs assessment survey was conducted as a condition of funding from the Ministry of Housing. The society wanted the project to be a renovation, and were assisted accordingly in the site search by a realtor. A delay occurred when the desired site was taken off the market for three months. No other sites were ever seriously considered. The modifications made to the house were relatively minor; although the consultants reviewed information from the Sidney, Toronto, other B.C., and U.K. Abbeyfields, their influence on the final design was minimal. The society did not wish to undergo major new construction. The site was already zoned appropriately, as the house had previously also been used as a private nursing home. Town administrators, and the community as a whole, were supportive of the project.



Note:
No floor plans of heritage house available

Funding:

The society was assisted by the development consultant in the search for financing. A grant for development costs was received from the Ministries of Housing and Community and Social Services. A bank mortgage financed the balance of the project. No donations were received, and no other active fund-raising was carried out.

RESIDENCE du PHARE Inc.

Gaspe, Quebec

Project Description: Renovation; 8 self-contained units, 1 double, 7 singles.

Form of Tenure: Rental.

Residents: 9 elderly residents from local community, identified through survey.

Staff: Couple act as full-time resident housekeeper and caretaker.

Site/context: Away from the city centre, but close to public transportation and other services for the elderly.

Date of completion: July, 1990.

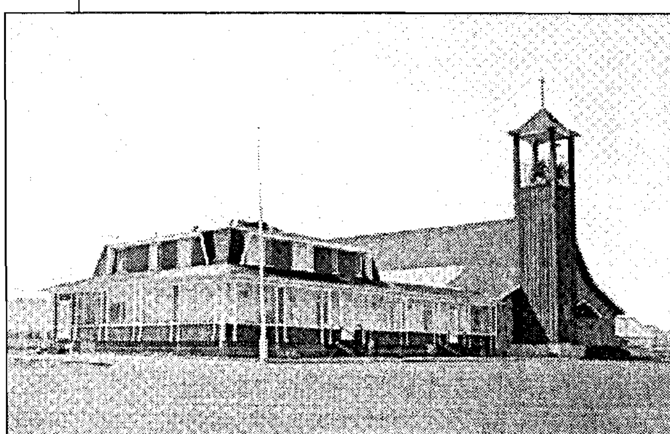
History:

The individuals interested in developing this facility came together through the Societe d'habitation du Quebec (SHQ) in 1989, with the impetus to provide supportive housing for the elderly, in a familiar environment with services suited to seniors. The housing society incorporated as a non-profit organization in Spring, 1989, and registered with Revenue Canada as a charity in 1990, in order to help finance the project.

Development Process:

The SHQ was involved in the development of this group home from the initial planning stages through to establishing staffing requirements. They assisted in the selection of an architectural consultant for the project and continued to work closely with the housing committee and the consultant throughout the design process. The site was chosen upon the basis of availability and accessibility to services for the elderly. For this site, renovation of the existing building proved to be the best option. Consideration of other group home precedents helped in making the appropriate modifications to the structure.

Note: No floor plans available for publication



Funding:

The society did not engage in any active fund-raising, but received financial planning assistance from the SHQ and other consultants. The project was financed 100% by a mortgage of $500,000. Government grants and subsidies assist with the repayment of this mortgage. Total monthly operating and maintenance costs for the house are $7,000, with the major portion of this going towards the mortgage. The average resident fee is $700/month.

HABITATION COMMUNITAIRE GRANDE MAISON BEAULAC

Beaulac, Quebec

Project Description: Purpose built, 10 units (one bedroom apartments).

Form of Tenure: Rental.

Residents: Independent seniors with low incomes.

Staff: One full-time resident housekeeper, one caretaker.

Site/context: Close to church and other amenities for seniors, view of the lake.

Date of completion: March, 1994.

Architectural Consultant: Harold Vachon of the Groupe Ressource Thetford.

History:

In response to a perceived shortage of available housing for elderly with low incomes, volunteers first came together with an interest to develop such a project, in 1984. The group officially formed as a housing society in 1993, and with the assistance of the Societe d'habitation du Quebec (SHQ), the project was realized in 1994.

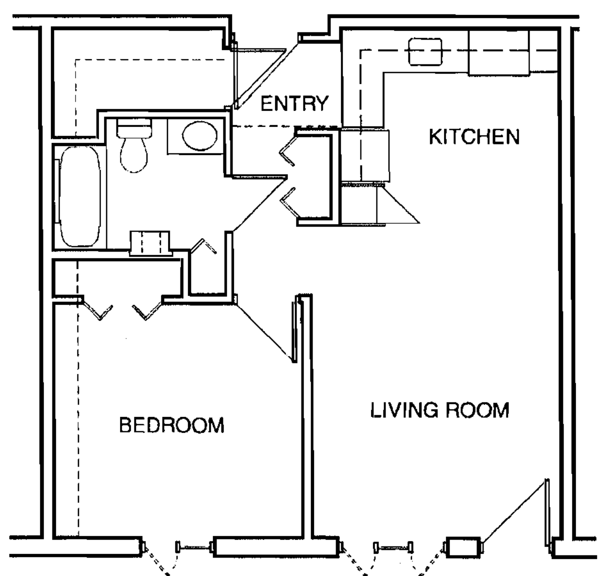
Development Process:

The SHQ was responsible for assisting the development of this project in every aspect, from appointing the architectural consultant from the Groupe Ressource Thetford, to approving the selected site and the final design. The site was purchased from the St. Charles Church, with the stipulation that it be used for low income housing. Though the housing committee would have preferred a larger site, this was the only available one that was reasonably priced and close to all the desired amenities. The community was generally supportive of the project.

Funding:

Habitation Communitaire Grande Maison Beaulac was funded entirely by government grants; 75% federal, and 25% provincial. The SHQ was responsible for setting up the mortgage with the funding agency. As such no additional active fund-raising was carried out, although the organization is registered with Revenue Canada as a charity, and did in fact receive a $2,000 donation for furniture, from the local community. The SHQ also established the annual operating budget; rental income is set at 25% of each tenant's annual income and any deficit is absorbed by the two government bodies.

Note: No building plan or photographs available



TYPICAL UNIT

APPENDIX B

Methodology

METHODOLOGY

Locating the case studies

The first task of the project was to create an Advisory Committee to assist with design of the study and recruitment of participating Abbeyfield societies and other relevant supportive group homes for the elderly in Canada. Other housing experts and agencies in different regions across the country were contacted for information about potential case studies that met the definition and fulfilled the selection criteria. Participation was sought from sponsors in various stages of the development process.

Interviews, Surveys & Project Tours

Eighteen out of the total of 22 case study projects were visited in person, toured and photographed. In addition, architectural drawings describing the projects were obtained in most cases. In six cases, no completed project yet existed, but both design drawings were viewed, and existing buildings or properties were visited. The neighbouring context was also photographed and noted, with respect to topography, transportation, shops and amenities. This was intended as both a visual record and as a means of verifying responses to interview questions about these subjects.

Using semi-structured interviews with key informants, data was elicited that enabled the construction of a timeline of events, a list of critical decisions made, problems encountered and their solutions. Details were provided about each project's location, municipality, building size and design, building code analysis, construction costs and sources of financing, fees, form of tenure, degree of participation of potential residents, etc. It was expected that projects would tend to fall into distinct categories such as projects that were funded and regulated by provincial housing programs, projects that were owned and sponsored by church groups or service clubs, and projects that were developed more-or-less independently. The development experiences and strategies for these project categories was presumed to vary.

The interview were used as self-administered questionnaires in the cases where travel by the researchers to the project location was not possible. Each questionnaire included a series of questions designed to provide a brief description of the respondents characteristics, including: age and gender, professional expertise, role with respect to the project, how long they had been involved, opinion about the housing model being studied, and other volunteer activities.

It was anticipated that the project owner or the chair of the sponsoring society or its building committee would have the most comprehensive information about the project. Questions directed to him or her covered information about:

- the origins of the organization, its characteristics and the discovery of the particular housing model or program;
- history of the group and the planning process

- the consultants retained
- fund-raising and financing
- land acquisition
- sources of inspiration or advice about any aspect of the project development or its operation
- determining staffing and resident recruitment
- subjective evaluations about decisions made

In some instances, the person who fulfilled the role of chair had changed over time. Where possible, both the former and the present chair were interviewed, unless the entire project was completed under the former chair, in which case this was the only respondent sought. Occasionally, from two to five members of the sponsoring society were equally involved, and chose to respond to the interview questions together. This preference was accommodated, and it was found that consistent, reliable and thorough information resulted, as the informants memories were supplemented.

A separate interview instrument was designed for the architect or development consultant. Questions in it included information about:

- sources for design ideas and experience with seniors' housing
- the municipal zoning and land use context
- details of their involvement in the project, including their relationship with the client group

Another brief questionnaire was designed to elicit information from the municipal planner, building inspector or a council member, depending on the specifics of the situation, and which of these parties had been most closely involved in the case study project. Questions included information about:

- municipal policy, attitudes, and experience with this type of housing project, and other seniors housing types
- specific instruments designed to manage developments such as these, such as zoning by-law definitions and articles
- perception of the group's representative's professionalism and experience

Finally, a short interview instrument was designed for the neighbourhood or interest group representatives who may have played a critical role in the development process, by either supporting or objecting to the project's location in their area. Questions included:

- initial introduction to the project or housing type
- responses to having such a project in their neighbourhood
- reasons for favouring or objecting to such a development

In the majority of cases, there was no significant involvement by neighbours or interest groups outside of the sponsoring society. In the few instances where some objections had been voiced, they had for the most part been resolved. The owners, sponsors, or the municipalities were either unwilling to identify these parties, or unable to due to poor record-keeping.

Case Study Project Timelines

For each case study the key informant data was cross-referenced to construct a single narrative and explanation of events. One key informant rarely had sufficient knowledge to provide all the desired information. Furthermore, varying opinions and perspective were sought to help construct a more objective historical account and assessment. For example, the Chair of the building or development committee of a local sponsor would probably have the best overview and longest history with the sponsor, the most familiarity with the aspect of fundraising and site selection, and perhaps have been selected for the role because of a greater expertise or familiarity with the development process. The number of respondents per project ranged from a low of 2, to a high of 6 or 7, with the typical case study involving 3 to 4 people.

The hired consultants, such as the development coordinator and architect usually had the most thorough and detailed knowledge of the political and technical circumstances, as well as opinions about the effectiveness of the owners or sponsor members in their collective role as a "client". The government representatives or private sector bankers were able to provide particular insight with regard to the economic feasibility and degree of effectiveness of the building committee or sponsor's financing strategies. Municipal officials such as planners and building inspectors who were responsible were able to contribute explanations of events and approvals processes under their jurisdiction, with particular emphasis on the concerns and perspective of their department with regard to public policy, public safety, conformance to regulations and their relevance, as well as the degree to which the sponsor and its consultants appreciated these concerns and were professional in their approach.

It was found that these various informants sometimes had different opinions about what had occurred, or why. These different versions were often the result of conflicts or problems that had occurred, and the differing assessment of responsibility after the fact. Sometimes, however, different perspectives went hand-in-hand with the different roles played by the informants. Although in some cases, a single version was difficult to distill, in most cases the combined information and perspectives provided a thorough account of the history of the project.

The Analysis Matrix

The data collected were placed into a matrix which enabled identification of similarities and differences between participating projects. An initial large matrix was organized roughly according to the sections of the interview instruments. Then, once the initial patterns had been assessed, smaller, subject-specific matrices were created.

Additional tables were created to summarize, compare and analyze financial data for both development costs and operations. The graphic format of these matrices allowed an abundance of complex variables to be "held" and visualized in a very compact and immediate way that permitted patterns and tendencies to emerge.

This kind of analysis of primarily qualitative data would otherwise have been an overwhelming task. The patterns, or lack thereof, revealed by the matrix analysis allowed the development of a typology based on commonalties across a range of interconnected variables. Without this ability to draw some generalities from the case studies' experience and circumstances, the resulting information would be difficult to interpret and use by others interested in applying this collective experience to their own situation. Each reader would be left to draw their own meaning from the survey data.

Preliminary analysis of the data in terms of these clusters of variables led to the larger division between the development process, and the operational set-up and organization. The project's advisory committee had made this recommendation as it became clear that the skills required, and the type of commitment necessary by the volunteers to these to different stages were fundamentally different.

The Final Report

The final report was produced after review and in-depth analysis of each subject area. Recommendations and guidelines for developing supportive small group homes for the elderly and disabled were developed based on both the unique circumstances and generalizable experiences of the case studies, across a variety of key variables. These variables reflect to some degree the project selection criteria, the most important of which are: location, both regionally and in terms of community size, ownership and form of tenure, and methods of funding, above all others.

APPENDIX C

Project Selection Criteria

PROJECT SELECTION CRITERIA

The project selection criteria included: geography, type of sponsor, new vs. retrofitted building, size of community, funding sources, age of house (i.e. chronology), form of tenure, sponsor maturity, stage of development completion and socio-economic status of target residents. Each of these criteria is discussed in terms of how well the sampled projects address them and why they were considered important.

Geographical Location or Region

The goal was to include representation from as many provinces and regions as possible. The final case studies represent five provinces and included the west, prairie and central regions. Very few examples of Abbeyfield houses exist in many parts of the country. The prevalence of projects in BC suggests that familiarity and information dissemination are key to the spread of this idea. Some case studies represent separate provincial programs in four provinces, each very different. While efforts were made to identify and contact potential projects from all regions of the country, some are not represented in the final study. The two primary reasons for this include an absence of projects in provinces or territory that matched the definition of the type of project under consideration. This is despite the loosening of definitional criteria, such as number of units, to be as inclusive as possible while remaining faithful to the concept. Secondly, in many instances, potential projects, or leads, did not generate responses or sufficient information to follow up, despite repeated inquiries. Thus, there may be relevant examples that were beyond the reach of time and resources available to this study.

Project Sponsor or Owner

A range of sponsor structures and affiliations was sought, though the majority are non-profit organizations. The study includes projects owned and sponsored by churches, as well as non-profit sponsors affiliated with church groups and service clubs such as IOOF, Kinsmen , Kiwanis, Lions or Rotary. Some projects are run by non-profit organizations with no affiliation, including groups of individuals planning their own housing. A unique project was included that is owned and co-managed by a municipal housing department. Also a project was included that was built by a long established non-profit housing society. This group had received support from service clubs in the past, but now functions independently and has managed other housing projects for twenty years. One project was included which was owned by a non-profit long term care society. Another unique example was a *for-profit* strata-title group-living project developed by a contractor.

New-built versus Retrofit of existing structure

Abbeyfield UK traditionally adapted large, single-family homes into group homes. Some Canadian sponsors have followed this example, in some cases using heritage homes. The study includes a mix of both renovated older buildings, new purpose-built buildings and combination renovation-addition projects.

Size of community

A very comprehensive range of community sizes are represented in the project sample, including central metropolitan, suburban metropolitan, medium sized cities, small towns and rural communities. This variable affects everything from land cost and therefore feasibility to zoning and building code regulations, and community involvement and support. It does not appear to have affected feasibility from the perspective of determining adequate need or interest in the local area because of the small number of units per project.

Funding source

Many different sources of funding, and combinations, are represented in the sample. These include: large endowments or donations; small donations from individuals, societies, clubs, foundations and lotteries; small grants from various levels of governments; private fund-raising efforts; and complete funding from provincial housing, health or social service ministries; CMHC insured and private mortgages for part or all (100%) of capital costs; land donations; leases at favourable rates (from municipalities or church diocese), or proceeds from the sale of land (i.e. church); financing through pension funds; and pre-sale of strata units or co-op shares. This very comprehensive list is indicative of the resourcefulness and ingenuity of the various owners and the variety of ways these projects are made to work. It is also a measure of the versatility of this housing model to respond to a variety of circumstances.

Age of house or maturity of sponsor

The first Abbeyfield to successfully build and open houses were Sidney, B.C. in 1987 and in Kelowna, B.C. in early 1988. The Port Hope house was the first in Ontario, opened in late 1989. These seminal Canadian houses were developed independently of each other, and had no other groups or built projects to base their experiences upon. In each case, other projects within the region followed in their footsteps, able to learn from their experience. The St. Martin's Saanich house has been opened since 1990, and along with another Saanich house, borrowed from the experience of St. Andrew's in Sidney. Orchard City and Vernon learned from the first Kelowna house, and many new sponsors have formed as a result of their influence.

Likewise, projects built under provincial government housing programs were able to build on the accumulated experience of all those built under the same system. This was further facilitated where provinces or municipalities provided resource coordinators, advisors and consultants who brought previous experience and know-how to each successive project, in Quebec in particular. This chain reaction of helping behavior appears to occur with or without a structured program, at least within certain limits of familiarity or regional accessibility.

Each successive generation seems to add new hard-learned lessons to the list of wisdom to be borrowed, and to have a subsequently easier time developing their project. In several instances, a sponsor chose to vary their approach from that of their near neighbour precedent, e.g., regarding financing or tenure. Consequently, they had to work through some new problems for the first time. The cumulative experience however is greater for each successive sponsor if they choose to or are able to access this information. While some problems are impossible to anticipate, there are so many variables affecting a project's success that this borrowed experience can make a significant difference.

It was felt that very newly formed societies would not be suitable candidates for the study because they would not have had much opportunity to organize or to define individual roles. There are, however, circumstances that have brought some new sponsors to a fairly mature stage in their project development quite rapidly, and thus they are included in the study. The factors that determine a slow versus a quick developmental process become evident as the individual circumstances are explored. As mentioned above, chronology and location can be significant factors determining how much information and guidance are available. Since the study was undertaken, new sponsors have emerged and completed projects in record time.

Form of Tenure

There are four types of tenure currently in existence within this housing model, including: rental, condominium, equity cooperative and life-lease. The experience of the self-developed equity co-op model is further enriched by comparing this to life-lease tenancy arrangements. Further, there is an 8-house cluster project of private condominiums grouped (10 compact self-contained units each) with a resident house similar to the Abbeyfield model. This private sector model appears to have a broad appeal, and is likely to spread to other communities, along with the traditional, non-profit approach.

Stage of Development

The study includes some projects that have been in existence for varying lengths of time, and others that were at different stages of completion. It was very useful to have included the "in-process" projects. The researchers observed the energy level, fluctuations in emotional temperature and group dynamics "as it happened." The people involved in these projects were more enthusiastic in making recommendations to improve on the process for others since the experience was so fresh for them. These amplitude of these feelings definitely fades with time.

Socio-economic Status of Target Population

The income bracket of the target residents of each project had an effect on many variables in the development process. Sometimes the chosen funding process pre-determined the income level of the residents (because of provincial regulations attached to housing subsidies). Projects are represented that include the wealthiest groups, middle income groups with some equity, and modest income residents who could afford at-cost rental rates at the typical privately funded project without subsidy. Depending on project costs, this rental rate was sometimes within the means of a senior with only Old Age Pension and income supplements, and other times they would require some additional source of income to afford the house. Projects are also included which house several subsidized tenants, and these were made possible through provincial funding, and through private donations.

Interestingly, although the Abbeyfield concept often has served the housing needs of those with low incomes, even in the United Kingdom, the Abbeyfield model has never held low income as a key aspect of its mandate and philosophy. Loneliness and supported independence are considered much more important needs that are addressed by the group living option. However, the particulars of several early Abbeyfield houses in Canada were such that subsidies were received, and lower income residents are accommodated. Some sponsor members have emphasized the importance of this criterion, without the sanction necessarily of the umbrella organization. The Abbeyfield Houses Society of Canada wants to ensure that the model is seen as a viable option for all income groups. Some people, however, have come to associate the name "Abbeyfield" with low income housing. For at least one group serving a high-income resident population, perceived stigma and disadvantages for marketing led to rumours about imminent "disassociation". The Abbeyfield name is not used in their advertisements.

By contrast, group home or grouped living projects developed under the previous programs in British Columbia, Ontario and Quebec received funding, and in some cases ongoing operating subsidies in order to provide affordable units to low-income elderly. Many of these projects were conceived and executed outside of the Abbeyfield organization's purview.