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**MILTON PARC EVALUATION  
PRELIMINARY STUDY DESIGN**

**DISCUSSION PAPER**

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by

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**MILTON PARC EVALUATION STUDY FRAMEWORK:**

**Part A: INTRODUCTION AND OVERVIEW**

A.1 BRIEF DESCRIPTION OF THE MILTON PARC PROJECT

A.2 GENERAL EVALUATION RATIONALE AND STRATEGY

A.3 FOCUS AND OVERVIEW

**Part B: STUDY DESIGN**

B.1 STUDY AREAS AND METHODOLOGY

LOCAL ECONOMY

Public Fiscal Balance

Property Values

Employment

Public and Private Sector Investments

HOUSING AND SOCIAL CONDITIONS

Housing Adequacy

Population Maintenance and Mix

Whitepainting Processes

DEVELOPMENT STRATEGY

Financial Effectiveness

Contiguous Area Development

Tenure Choice

Physical and Social Preservation

POLICY AND PROGRAM ISSUES

Cooperative Housing Program

Non-Profit Housing Program

Effectiveness of Targeting

B.2 OUTPUT: CONTENT, FORMS AND CLIENTSHIP

**Part C: TEAM ORGANIZATION AND MANAGEMENT AND RESOURCE REQUIREMENTS**

**Part D: CONCLUSIONS AND RECOMMENDATIONS**

**APPENDIX: OTHER EVALUATION AREAS CONSIDERED**

Canada Mortgage and Housing Corporation, the Federal Government's housing agency, is responsible for administering the National Housing Act.

Under the provisions of the National Housing Act, administered by CMHC, there is continuing federal involvement in many aspects of urban development through program administration.

Through Operations Support the Corporation undertakes research aimed at improving the quality of the administration and management of existing procedures and programs. Where possible CMHC publishes and distributes the results of this research.

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**Part A**  
**INTRODUCTION AND OVERVIEW**

**A.1 BRIEF DESCRIPTION OF THE MILTON PARC PROJECT**

Part A  
INTRODUCTION AND OVERVIEW

A.2 GENERAL EVALUATION RATIONALE AND STRATEGY

Rigorously assessing the impacts of the Milton Parc project on the project area itself, on the adjoining neighborhoods, and on the city of Montreal as a whole would help clarify the true advantages and disadvantages of the Milton Parc redevelopment strategy. More specifically, such an assessment would enable officials, administrators and professionals to identify problems that require local policy or operational changes, to derive maximum benefits from the positive aspects and from the lessons to be learned from the project, to assess the effectiveness with which agreement policies and programs have been applied and, if necessary, to reformulate policies, programs and operating procedures for future projects.

The system of evaluation measures proposed in this paper is not a mechanistic approach; while it utilizes the most dependable and complete information sources available or reasonably obtainable, nevertheless, in the final analysis it relies substantially on judgements. Because of their complex interdependencies, these measures cannot be inserted into a formula that will give an automatic or final answer to the true significance of the Milton Parc project. In particular situations, any one measure could become of great - or even primary-importance; yet the same measure may be insignificant in other times or circumstances. Findings must, therefore, be considered by officials and other study result clients in light of what they already know about the project and what their individual assets, needs and political realities are. In short, this system is intended to assist decision makers by giving them a way of obtaining improved information within an organized framework; they, not the system, must weigh the factors in each case.

As a general rule, the larger and more precedent-setting the development, the more it represents new departures in local growth patterns, and the greater its potential impacts, the more comprehensive the evaluation and impact areas need to be and the more carefully each impact needs to be considered. However, at the time the evaluation decisions are being reached, local conditions will determine many of the measures that require detailed consideration. For example, measures of housing supply relative to housing needs that would be crucial in terms of housing shortages could be only briefly considered when there is an adequate supply of satisfactory housing available for most income levels.

For most developments, only a few measures are likely to be of sufficient importance to warrant detailed data collection. As well, highly precise estimates and in-depth analysis usually are not needed.

However, the confidence in the estimate should be brought to the attention of policy makers and the public. In some instances it will be useful to give the range of probable impacts in addition to the "most likely" estimates. While with completed developments, such as Milton Parc, data collection and analysis can focus more on measurements of actual changes than on estimates, there is usually a problem of absolutely attributing changes to the development rather than to other factors. The results of such studies must necessarily be more indicative than conclusive.

The Milton Parc project appears to fall somewhere between the extremes noted above in terms of the comprehensiveness, depth and detail of the impacts assessed. In the discussion following, two levels of data collection and analyses are discussed for the measures - one level for a brief, rough cut at estimating impacts (obviously the more economical approach), and a second level where immediate practical benefits and/or longer-term CMHC plans, or public interest, requires and justifies more thorough analysis. Most evaluation and impact areas should be assessed using the simpler form, partly because of time, skill, and money constraints, but also because incremental impacts from the Milton Parc project are not likely to be substantial enough to justify voluminous data gathering and intricate analyses. Yet, areas such as adequacy of housing for the lower-income populations, a major concern in the project, requires a more in-depth and detailed data gathering and analyses and recurs in different forms throughout the study.

Since the measures of impacts are often strongly related it is important to consider them as a set: a change in one measure may affect others. Factors that at first may seem unimportant thus should not be too hastily discarded since impacts are often complexly interrelated and involve numerous tradeoffs. This caution is meant not to warn against undertaking evaluation studies, but rather to retain a degree of open-endedness and a realistic perspective if the study results are to be of most use to the recipients.

To illustrate, consider that for many new developments there is a trade-off between government expenditures and the quality of public services. The trade-off often varies with time. For example, certain facilities may be pushed to capacity by a new development before adequate relief can be afforded. Often, quality is allowed to slip in the interim. It is therefore necessary to discuss both the government expenditures and the quality of services, and how they vary over time. Similarly, when looking at other measures it is important to report all potential trade-offs as explicitly as possible.

In practice, the available resources - money, time, skills, and tools - often dictate the level of analysis as much as the factors cited above. Costs will vary widely depending on the size of the subset of measures used, the level of accuracy desired, the availability of suitable methodologies and data, the number of clientele groups for which

distinct impacts need to be charted, the experience of the analytic staff, and the backlog of previous analyses that can provide useful comparisons. Overemphasis on data precision can lead to unnecessary data collection costs. The precision and costs should be commensurate with the importance of the decision at hand. In general, the expenditures for evaluations also should be in line with the size and importance of the developments to the client groups.

All of these considerations have played a role in formulating the detailed evaluation strategy following.

**Part A**  
**INTRODUCTION AND OVERVIEW**

**A.3 FOCUS AND OVERVIEW**

In undertaking any urban redevelopment project, attention must obviously be focussed on carrying out the project itself and on its direct effects rather than on its secondary or indirect effects. Yet it is clear that projects of substantial size and uniqueness, such as Milton Parc, cannot be treated as discrete incidents isolated from their contexts: their potential, and the difficulties associated with them, typically extend far beyond their physical boundaries. In other words, they have spillover effects which impact on neighboring jurisdictions. Consequently, assessing the physical, social, economic, political and other impacts of such projects helps to determine their costs and benefits and, ultimately, their true social significance.

From the beginning of the Milton Parc project, CMHC was concerned with not only the rehabilitation of the neighborhood but also with the project's impacts, particularly its negative impacts, on the adjoining neighborhoods and on the City of Montreal more generally. In contrast, and perhaps not surprisingly given its direct role in the redevelopment process, SPUM's attention appeared to be almost exclusively focussed on the project area itself: while they were undoubtedly aware of the potential wider implications of their project, their operational assumption seemed to be that any impacts which the Milton Parc project would have on the surrounding neighborhoods and on the city as a whole would generally be positive.

The impacts of the Milton Parc project on the physical and institutional infrastructure of the Milton Parc area, on the surrounding neighborhoods as a whole, and on the city of Montreal's resources, facilities and services should be assessed. In addition, attention should be paid to impacts on specific clientele groups. Various segments of the population, such as businessmen, elderly, or low-income families, in Milton Parc and in adjoining neighborhoods, may be affected in quite different ways by the project. Some may be helped, some may be hurt, and others not affected significantly. Therefore, besides looking at impacts in Milton Parc, on adjoining neighborhoods and on the city as a whole, it is advisable to estimate explicitly the impacts on different population segments. Finally, and undoubtedly of most direct concern to CMHC, it is also necessary to assess these impacts in relation to CMHC's policies, programs and operating procedures.

While it is generally easier to measure primary effects of a project, nevertheless, it seems desirable, as part of project impact measures, to do one's best to determine the nature of the secondary effects and to estimate them at least qualitatively, and to note the directions and



orders of magnitude of the impacts where feasible. When such an exercise suggests that the secondary effects are or could be substantial, as appears to be the case with the Milton Parc project, this information should be included along with the direct project measurement data and presented to the decision makers.

The evaluation framework developed in this paper contains essentially four components:

- 1) the input or substantive component (included in Part B): identifies the subjects to be evaluated and explains the reasons for their evaluation;
- 2) the methodological component (included in Part B): presents data requirements and clarifies the perspectives from which the analyses are to be undertaken;
- 3) the output or user component (included in Part B): describes the final content and forms (management reports; detailed technical reports; publicly-oriented documents; etc.) of the evaluation study results and the likely clientship for these results; and
- 4) the organization and cost component (Part C): proposes a study team organization and management and estimates study costs.

## Part B STUDY DESIGN

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This chapter includes two sections. The first section briefly describes each area to be evaluated, the reasons for this evaluation, and the strategy proposed for implementing the evaluation research. The second section describes the form and content of the output and the client groups toward which this output is directed.

### B.1 STUDY AREAS AND METHODOLOGY

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For clarity, a consistent format is used to present each of the major research topics. Following a brief description of a topic (e.g. 'Local Economy') each subtopic is detailed in terms of a) its research rationale and focus and b) the particular evaluation research strategy to be pursued. In each case this strategy includes hypotheses, indicators, data requirements, and analyses to be undertaken.

A limited number of potentially fruitful evaluation areas relating to the Milton Parc project can be identified for assessment. These include:

- the local economy:
  - i) public fiscal balance
  - ii) property values
  - iii) employment, and
  - iv) public and private sector investments;
- housing and social conditions:
  - v) housing adequacy
  - vi) population maintenance and mix, and
  - vii) whitepainting processes;
- development strategy:
  - viii) financial effectiveness
  - ix) contiguous area development
  - x) tenure choice
  - xi) physical and social preservation;
- policy and program issues:
  - xii) cooperative housing program
  - xiii) non-profit housing program
  - xiv) effectiveness of targeting.

These study areas can be analyzed from two primary perspectives:

- 1) in terms of the spatial extent of the impact assessment:
  - within Milton Parc impacts;
  - impacts on adjoining neighborhoods; and/or
  - wider area impacts (e.g., on the City of Montreal as-a-whole); and

- 2) in terms of the purposes of the analyses which are to be undertaken:
- project-related analyses which assess the rationale, development process, or achievement of objectives of the Milton Parc project;
  - analyses of the substantive impacts and effects of the Milton Parc project, whether or not these impacts and effects were intended; and
  - analyses which relate specifically to policy and program issues (e.g. the degree to which the target groups were reached).

These study categories and the two analytical perspectives are outlined on the following page. The study strategies for each are detailed in the following sections.

Figure 1: OVERVIEW OF RESEARCH FOCUS AND STRATEGY

EVALUATION AREAS	SPATIAL EXTENT OF IMPACT ASSESSMENT			TYPES OF ANALYSES		
	Within Milton Parc Imacts	Adjoining Neighborhood Impacts	Wider Area Impacts	Project Rationale, Process, Achieve- ment of Objectives	Substantive Impacts and Effects	Policy and Program Implication
<b>LOCAL ECONOMY</b>						
i) Public Fiscal Balance	*	*	*		*	
ii) Property Values		*			*	
iii) Employment	*	*			*	
iv) Public and Private Sector Investments	*	*			*	
<b>HOUSING AND SOCIAL CONDITIONS</b>						
v) Housing Adequacy	*	*		*	*	*
vi) Population Maintenance and Mix	*	*		*	*	
vii) Whitepainting Processes						
<b>DEVELOPMENT STRATEGY</b>		*			*	
viii) Financial Effectiveness						
ix) Contiguous Area Development						
x) Tenure Choice						
xi) Physical and Social Preservation						
<b>POLICY AND PROGRAM ISSUES</b>						
xii) Cooperative Housing Program						
xiii) Non-Profit Housing Program						
xiv) Effectiveness of Targeting.						

## LOCAL ECONOMY

The Milton Parc project will likely affect the local economy of Milton Parc and the surrounding neighborhoods in critical ways. Four of the most important are changes in i) net government fiscal flow (revenues less expenditures), ii) wealth, and specifically property values, iii) employment, and iv) public and private sector investments. The four are closely interrelated. For example, changes in land values may change property tax revenues and thereby the fiscal flow and public and private sector investments in Milton Parc and in the adjoining neighborhoods. Measures for indicating these four impacts of the Milton Parc project are discussed separately below in relation to the particular research procedures to be followed.

### i) Public Fiscal Balance

Milton Parc's fiscal impact on local government - the net change in public revenues less operating expenditures and (annualized) capital expenditures - depends to a considerable extent on whether the government maintains or changes its level and quality of services to the new development and to the surrounding communities on completion of the development. Concurrently, the level of service to be provided is likely to depend to some extent on the estimated fiscal impacts. That is, the community chooses a level of service based in part on its perception of what it can afford. To further complicate matters, maintaining the same expenditures per capita or per housing unit is not necessarily synonymous with maintaining the same quality of service, since the demands for services and the costs of supplying them may change faster or slower than the rate of residential or business population growth.

A research design for estimating the impact of the Milton Parc project on the public fiscal balance is shown in Figure 2.

Figure 2

LOCAL ECONOMY: Milton Parc Project Impact on the Public Fiscal Balance

HYPOTHESES	INDICATORS	DATA	ANALYSES
Central city fiscal capacity as it relates to a) the Milton Parc area and b) the adjacent neighborhoods will be strengthened as a result of the Milton Parc project. In particular, property tax revenues will increase sufficiently to offset increased operating and annualized capital expenditures.	Net change in government fiscal flow (revenues less operating expenditures and annualized capital expenditures) in a) the Milton Parc area and b) the adjacent neighborhoods.	<ul style="list-style-type: none"> <li>Revenues associated with real property wealth.</li> <li>Revenues associated with income and level of consumption (local income, sales, utility taxes).</li> <li>Per capita revenues (e.g. transfer payments).</li> <li>Miscellaneous revenues (fees, user charges, fines, licenses, minor items).</li> </ul>	Revenue analyses.
		<ul style="list-style-type: none"> <li>Health and welfare services.</li> <li>Education services.</li> <li>Library services.</li> <li>Recreation services.</li> <li>Fire and police services.</li> <li>Utilities.</li> <li>General government services.</li> <li>Transportation.</li> </ul>	Operating expenditure analyses.
		<ul style="list-style-type: none"> <li>Capital expenditures for facilities (schools, sewer lines, etc.) constructed or expanded as part of a capital improvement program shared by Milton Parc and adjacent residents.</li> <li>Annualizing costs.</li> <li>Timing of capital expenditures</li> </ul>	Capital expenditure analyses.

ii) Property Values

A primary objective of the Milton Parc project was the elimination of land speculation through the elimination of profit. This objective is based on the principle of collective ownership in the cooperative movement. Collective ownership creates a collective capital which can never revert back to individual capital and therefore represents permanent benefits for its members; unlike private ownership, the value remains with the property. Thus, the Milton Parc area has been effectively removed from the conventional housing market system.

In spite of this, and perhaps in some ways because of it, the Milton Parc project will undoubtedly have an impact on the property values in adjacent areas. As with all large-scale development projects, property values in adjoining neighborhoods may be modified either up or down, although probably up. The degree of impact is a function of many factors, including the prospects of further development, zoning policies, the demand for land for various purposes, changes in economic activity generated by the development, accessibility, available amenities, and the type of land use change. The impacts on property values usually diminish with distance from the development.

A number of studies have undertaken to quantify the relationship of various factors to property values. While the major reasons for differences in property value from one area to another have been reasonably well established, less is known about the quantitative impact of new developments on surrounding property values, although some studies have examined the relationship.

Factors associated with urban redevelopment which affect adjacent property values include the following: type of development (low-rise, highrise, etc.); number of new households; remaining properties available for redevelopment; availability of public facilities; changes in property taxes; and physical characteristics of the properties and land.

A research design for estimating the impact of the Milton Parc project on adjacent property values is shown in Figure 3.

Figure 3

LOCAL ECONOMY: Milton Parc Project Impact on the Property Values in Adjacent Neighborhoods

HYPOTHESES	INDICATORS	DATA	ANALYSES
Landlords and homeowners in adjoining neighborhoods will see their property values increase as a result of the Milton Parc project: the face lift of Milton Parc will increase the broader area's desirability as a residential area, resulting in an upward movement of property values with demand at a higher rate than if the Milton Parc project had not been undertaken.	Change in property values in adjoining neighborhoods.	<ul style="list-style-type: none"> <li>• Resale rates of rental housing.</li> <li>• Resale rates of owner-occupied housing.</li> <li>• Resale values (dollars) of rental housing.</li> <li>• Resale values (dollars) of owner-occupied housing.</li> </ul>	Comparison of sales data for similar properties before and after the Milton Parc development (prices adjusted for inflation).
		<ul style="list-style-type: none"> <li>• Property assessment records.</li> </ul>	Comparison of pre- and post-development appraisal of similar properties.
		<ul style="list-style-type: none"> <li>• Records of public improvements.</li> </ul>	Estimate of impacts which public improvements (roads, sewers parks, etc.) had on property values.



iii) Employment

The traditional measure of the impact of a new development on employment, both within and outside the project area, is the total number of jobs created. This measure is of interest and relatively easy to determine, but it does not directly reflect the impact of the development on employment opportunities for the present citizens of the community or for adjacent populations. It does not indicate whether the new jobs have been taken by persons from outside the community or by persons within the community. In the latter case, have old jobs been wiped out or have new openings been created, and who filled these new openings?

To deal with these matters requires explicit measures of the impact of the development on unemployment and underemployment as well as on the new long-term and short-term jobs added to the community. Even if the impact on unemployment and underemployment can be only crudely measured, as is likely, it will help provide a more balanced impression of the significance of the new jobs. Note that a net addition of jobs to a community reduces the percentage unemployed, even if no one currently unemployed gets a job. For this reason, absolute as well as percentage changes should be identified.

Unlike industrial and commercial development, which typically directly creates additional jobs, residential development only creates jobs indirectly, except for those utilized in the construction itself. Although Milton Parc is primarily a residential development, it does contain a small commercial component which may have an impact on employment.

The Milton Parc project probably provided some employment opportunities for workers in Milton Parc and in adjacent neighborhoods during the construction process. However, it would appear that, in general and over the longer-term, the spillover of the physical and social upgrading of the Milton Parc project into the surrounding neighborhoods will likely contribute to the decrease of the total number of housing units, to the decrease of the total commercial and other business establishments, and to the decrease of the total populations in these areas. In addition, partly as a result of the Milton Parc project, these areas are likely to become more exclusively residential and to be inhabited by a higher-income population than presently exists. These and other factors will probably result in a decrease in non-residential land uses and in a net decrease and socioeconomic upgrading of jobs in both Milton Parc and the adjoining neighborhoods.

A research design for estimating the impact of the Milton Parc project on the employment patterns of both Milton Parc and the surrounding neighborhoods is shown in Figure 4.

Figure 4

LOCAL ECONOMY: Milton Parc Project Impact on the Employment In Adjacent Neighborhoods

HYPOTHESES	INDICATORS	DATA	ANALYSES
<p>The Milton Parc project will, during the construction process, positively affect employment in Milton Parc and in the surrounding neighborhoods. However, upon completion of the construction process and over the longer-term, it will adversely affect employment in these areas, particularly in the lower-paid service sectors.</p>	<ul style="list-style-type: none"> <li>Number of jobs, by type and socio-economic status, eliminated in a) the Milton Parc area and b) the adjacent neighborhoods.</li> <li>Number of new long-term and short-term jobs provided in a) the Milton Parc area and b) the adjacent neighborhoods.</li> </ul>	<ul style="list-style-type: none"> <li>Total number of jobs in areas, by types and socio-economic status.</li> <li>Construction-related short-term employment.</li> <li>New jobs generated and/or (with respect to businesses still to be formed) estimated number of employees needed for their expected level of output or service.</li> </ul>	<ul style="list-style-type: none"> <li>Comparison of total jobs by types and socio-economic status, before and after the Milton Parc development.</li> <li>Survey among new employees to determine their prior work location and work status.</li> <li>Growth of service industries in relation to the increase of primary jobs.</li> </ul>
	<ul style="list-style-type: none"> <li>Change in numbers and percent employed, unemployed and underemployed in a) the Milton Parc area and b) the adjacent neighborhoods.</li> </ul>	<ul style="list-style-type: none"> <li>Pre-Milton Parc development employment, unemployment and underemployment figures.</li> <li>Post-Milton Parc development employment, unemployment and underemployment figures.</li> </ul>	<ul style="list-style-type: none"> <li>Numbers and percent employed, unemployed and underemployed before and after the Milton Parc development.</li> <li>Stability of jobs associated with the Milton Parc development, estimated by comparing how many workers were laid off due to cutbacks and the rate of expansion of the local labour force during the two or three years after completion of the development.</li> </ul>

iv) Public and Private Sector Investments

The degree to which the Milton Parc project affects public and private sector investments in the Milton Parc area itself and in the adjoining neighborhoods is a key indicator of its successes and/or failures. As with other indicators, it will likely not be possible to establish an absolute casual relationship between such investments and the Milton Parc project. However, a combination of empirical data and professional judgements regarding various trends and conditions in the area should give a reasonably clear picture of the actual impacts.

A reserach design for estimating the impact of the Milton Parc project on public and private sector investments in both Milton Parc and the surrounding neighborhoods is shown in Figure 5.

Figure 5

LOCAL ECONOMY: Milton Parc Project Impact on Public and Private Sector Investments

HYPOTHESES	INDICATORS	DATA	ANALYSES
The Milton Parc project will stimulate an increase in public facility investments in the Milton Parc area and in the adjacent neighborhoods.	Changes in City of Montreal and Province of Quebec budgetary allocations in a number of service sectors in a) the Milton Parc area and b) the adjacent neighborhoods.	Budgetary allocations by the a) City of Montreal and b) Province of Quebec with respect to: - streets and parking; - snow removal; - sanitary sewer and water; - electric light and power; - gas; - schools; - police stations and police coverage; - fire stations and equipment and fire protection coverage; - hospitals; - general administrative buildings; - civic or social centres; - cultural or recreational centres; - parks and landscaping; - aesthetic improvements (e.g. signage).	Analyses of pre- and post-Milton Parc development budgetary allocations, by area (Milton Parc; adjacent neighborhoods) and source (City of Montreal; Province of Quebec).
Due partly to the direct effects of the Milton Parc project, and partly as a result of increased public facility investments, private sector investments in both housing and commercial facilities will increase in both the Milton Parc area and in the adjacent neighborhoods.	<ul style="list-style-type: none"> <li>Changes in the rate and amounts of housing building permits in a) the Milton Parc area and b) the adjacent neighborhoods for c) new construction and d) improvements.</li> <li>Changes in the rate and amounts of commercial property building permits in a) the Milton Parc area and b) the adjacent neighborhoods for c) new construction and d) improvements.</li> </ul>	<ul style="list-style-type: none"> <li>Building permits issued for a) new housing and b) improvements, by amount.</li> <li>Building permits issued for a) new commercial establishments and b) commercial establishment improvements, by amount.</li> <li>Existing commercial establishment licenses renewed and new establishment licenses provided.</li> </ul>	Analyses of pre- and post-Milton Parc development private sector investments, by area (Milton Parc, adjacent neighborhoods) land use type (housing; commercial), and amount.

## HOUSING AND SOCIAL CONDITIONS

Impact analyses should attempt to assess changes in the housing supply from the perspective of community housing needs. However, in assessing impact, housing should not be viewed only in terms of new or existing physical structures. Viewed more broadly, housing involves meeting certain needs and preferences for a large range of services. In this context, and indeed this is the case with respect to the Milton Parc project, housing is seen as a delivery system for these services.

The effects of the redeveloped housing in Milton Parc on the price of housing in the area itself and in adjacent neighborhoods has already been dealt with in the section on "Property Values". Such price changes affect the ability of households to obtain adequate housing or, if renting, even to stay in the community.

But the area probably given least attention in most evaluations is the impact of a development on neighborhood social conditions - the interaction of people with one another, the ways in which residents and workers use the neighborhood, and their attitudes or perception of the neighborhood as a place to live or work.

From Heritage Montreal, whose purpose was to help promote and fund urban conservation, to the Société du Patrimoine Urbain de Montréal, an objective of preservation was shared and highly valued. The objective had two components: physical preservation of the buildings and social preservation of the neighborhood. SPUM brought to its task two interrelated objectives: to preserve the neighborhood in the interests of its least privileged residents, and to redress the inequities inflicted upon low-income people by the normal workings of the private market.

Many implications of the Milton Parc project objective of physical and social preservation can be assessed realistically only within the context of (1) cumulative impacts of past developments (such as the displacement caused by La Cité), (2) potential impacts resulting from changes in the use of present structures and facilities (as when Milton Parc's maturing community with a declining birth rate demands fewer child-oriented and more elderly services and facilities), and (3) future sociodemographic changes that are likely to occur in the community (as will likely happen when Milton Parc's substantial elderly population will be replaced almost totally within a very short time span).

The impact of the Milton Parc project on social and physical conditions in the area itself and in adjacent neighborhoods should be assessed by considering the changes to a series of interrelated factors, the most important of which are:

- Housing adequacy, and particularly the availability of affordable housing for lower-income groups and physical preservation of the existing housing stock;

- displacement and relocation of existing residents and workers; and
- whitepainting processes in adjacent neighborhoods.

v) Housing Adequacy

In the Milton Parc project, physical preservation - that is, saving the buildings and infrastructure from both demolition and disrepair - was a primary objective. Nevertheless, in Milton Parc, as in all residential redevelopment projects, the housing stock in the community can obviously be affected not only by preserving the existing stock but also by providing new housing units and by upgrading or demolishing substandard units. (A substandard housing unit is one which has characteristics which are detrimental to the occupant's health or safety.) Renovations to buildings are generally seen as instilling a new life and appearance along streets, building up neighborhood pride and confidence which induce further improvements to the exterior spaces, attract commercial activity, and increase the demand for housing and municipal services.

This probably has to some extent already occurred in the Milton Parc area and, partly as a result, will be occurring in the adjoining neighborhoods. In both areas, the Milton Parc preservation and upgrading will also likely result in a more consistent housing stock (in terms of physical standards) and a more homogeneous stock (in terms of type of housing, price and tenure).

Housing standards applied are also relevant in relation issues of housing adequacy. Like other similarly funded projects, the Milton Parc project renovations had to comply with the National Building Code and with CMHC's housing standards. The argument generally advanced is that a more rigid adherence to standards not only creates a better living environment but helps to increase the life expectancy of a building to at least the duration of the mortgage (35 years for cooperatives and non-profit groups). In this sense, the subsidy is recovered through a better housing stock that generates further money transfers, and the general economy is thus healthier. The city's subsidies are similarly recovered after a few years of increased taxes from the improved and reassessed property.

At the site scale, community standards in the Milton Parc project were established by architects working with SPUM to treat outdoor spaces as communal spaces, eliminating fences, additions, and outdoor storage spaces, identifying pedestrian paths, gathering points, and transitional zones between private and public domains.

With respect to the Milton Parc project itself, public accountability issues which should be assessed are: 1) have the units and buildings been upgraded below, at, or beyond a) the standards suggested or implied in the public programs utilized and b) the standards of comparable market housing; and 2) have the site developments been upgraded below, at, or beyond a) and b) above.

A research design for determining these impacts of the Milton Parc project is shown in Figure 6.

Figure 6

HOUSING AND SOCIAL CONDITIONS: Milton Parc Project Impact on Housing Adequacy

HYPOTHESES	INDICATORS	DATA	ANALYSES
Insofar as it acts as a model for physical redevelopment in the general area, the Milton Parc project will, in the adjacent neighborhoods, result in a decrease in substandard housing, a decrease in the housing stock mix, and a decrease in housing accessible to low and moderate-income households.	Change in number and percent of housing units that are substandard, and change in number and percent of people living in such units in a) the Milton Parc area and b) adjacent neighborhoods.	<ul style="list-style-type: none"> <li>• Age of structure.</li> <li>• Structural hazards.</li> <li>• Availability of plumbing facilities.</li> <li>• Availability of natural light and ventilation.</li> <li>• Availability of kitchen facilities.</li> <li>• Degree of crowding.</li> <li>• In multiple housing, adequacy of fire protection.</li> </ul>	<ul style="list-style-type: none"> <li>• Estimating substandard housing: comparison of pre- and post-Milton Parc development figures regarding substandard housing in a) the Milton Parc area and b) adjacent neighborhoods, and estimates of number and percent of people living in such units.</li> </ul>
	Change in number and percent of housing units by type (price or rent range, zoning category, owner-occupied and rental, etc.) relative to number of families in various income classes in a) the Milton Parc area and b) adjacent neighborhoods.	<ul style="list-style-type: none"> <li>• Housing prices, classified according to five to ten sales price or annual rent level bands (from past and current sales price information collected by realtors or, in the absence of such data, assessment records with data adjusted by the use of assessed-to-market value ratios);</li> <li>• Type of housing;</li> <li>• Type of zoning;</li> <li>• Type of tenure (determined from sampling property tax records).</li> </ul>	<ul style="list-style-type: none"> <li>• Estimating changes in housing mix: comparison of pre- and post-Milton Parc development housing mixes in a) the Milton Parc area and b) adjacent neighborhoods.</li> </ul>
		<ul style="list-style-type: none"> <li>• Socio-economic profiles of the local populations;</li> <li>• Costs of housing;</li> <li>• Ownership status;</li> </ul>	<ul style="list-style-type: none"> <li>• Estimating housing needs: comparison of pre- and post-Milton Parc development costs of housing and local income</li> </ul>



Figure 6 (Cont'd)

HOUSING AND SOCIAL CONDITIONS: Milton Parc Project Impact on Housing Adequacy

HYPOTHESES	INDICATORS	DATA	ANALYSES
		<ul style="list-style-type: none"> <li>. Type of household/family;</li> <li>. Occupancy rates.</li> </ul>	<p>distribution patterns in relation to an appropriate local norm of % family income spent on housing, varying by ownership status, income, and type of household/family; occupancy rates for various types and prices of standard housing, for both pre- and post-Milton Parc development periods.</p>
<p>Housing standards in the Milton Parc project have been upgraded beyond the standards suggested and implied in the public programs utilized and beyond the standards of comparable market housing projects.</p>	<p>Change in housing standards (unit and building) in the Milton Parc project area.</p>	<ul style="list-style-type: none"> <li>. Building and unit standards in terms of: <ul style="list-style-type: none"> <li>- structural stability;</li> <li>- functional planning;</li> <li>- energy conservation;</li> <li>- sound proofing;</li> <li>- quality of materials;</li> <li>- plumbing and electrical systems;</li> <li>- residents' satisfaction with the improvements.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>. Comparison of pre- and post-Milton Parc redevelopment housing standards.</li> <li>. Comparison of Milton Parc housing standards with comparable market housing in adjoining neighborhoods.</li> <li>. Implications with respect to the housing programs used.</li> </ul>
<p>Site development standards in the Milton Parc project have been upgraded beyond the standards suggested and implied in the public programs utilized and beyond the standards of comparable market housing projects.</p>	<p>Change in site development standards in the Milton Parc project area.</p>	<ul style="list-style-type: none"> <li>. Site layout and use standards in terms of: <ul style="list-style-type: none"> <li>- functional planning;</li> <li>- territorial definition and use;</li> <li>- cooperative and non-profit group identity and site use;</li> <li>- shared communal site facilities;</li> <li>- servicing;</li> <li>- overall neighborhood improvement;</li> <li>- residents' satisfaction with site layouts and use.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>. Comparison of pre- and post-Milton Parc redevelopment site development standards.</li> <li>. Comparison of Milton Parc site development standards with comparable market housing projects in adjoining neighborhoods.</li> <li>. Implications with respect to housing programs used.</li> </ul>

vi) Population Maintenance and Mix

Redevelopment often uproots current residents by physically displacing their homes. Less obviously, redevelopment may cause people, and often only certain kinds of people, to move because of its effect on taxes or on the physical or social environment.

Redevelopment can also displace workers by removing existing stores and other enterprises. When certain jobs are eliminated and not moved to a convenient new location or substituted for by new jobs in the project, the net loss of employment could cause some people to leave the area entirely.

This redevelopment often not only displaces an existing population but also affects the population mix.

A main objective of SPUM in the Milton Parc project was to allow existing residents to stay in their neighborhood during and following the redevelopment process. Indeed, the whole idea of setting up cooperatives in the first place was to fight speculation and displacement, which had destroyed a third of the neighborhood in the late 1960's. Neither SPUM nor CMHC wanted to cause large scale displacement. The reasons for attempting to minimize displacement were: 1) humanistic (e.g. the right to housing), 2) ideological (e.g. people should have control over their own lives), and 3) practical (e.g. it would be easier to build a strong sense of community around the existing population).

To minimize displacement, SPUM chose to minimize rent increases needed to carry the costs of purchase and renovation. This entailed primarily using all available programs and subsidies: CMHC's 100% insured mortgages and interest rate supplements were all applicable only to cooperatives and non-profit groups. Not only would these methods reduce costs to residents, but they would preserve, for the long run, the ability of low and moderate income households to occupy these apartments, and they would reduce the possibility of individuals or groups taking profits out of the housing. The subsidized value would rest indefinitely with the project.

In the Milton Parc project, social preservation was interpreted as allowing and encouraging the residents in the area at the time of development to remain as long-term residents in the area. However, given SPUM's and other participants particular redevelopment orientation, not all residents were equally allowed or encouraged to stay. For example, for a number of the key SPUM staff, equalization of housing rights was a primary goal. This was true particularly for low-income people, whose first recourse against the erosion of the control of their lives, especially their housing situation, was, according to these SPUM staff, to abolish their particular relationship of landlord to tenant, which often involved exploitation

through profit making and speculation on the value of land. Yet, the Milton Parc residents who already felt that they were equal in their housing condition, through ownership, rental, socio-economic status, or accumulated equity, appear to not have been in a similar position to manifest their needs and aspirations.

There are, therefore, a number of important evaluation issues, in both the Milton Parc area and in the adjacent neighborhoods, associated with the objective of population maintenance. A research design for assessing the impact of this objective is shown in Figure 7.

Figure 7

HOUSING AND SOCIAL CONDITIONS: Milton Parc Project Impact on Population Maintenance and Mix

HYPOTHESES	INDICATORS	DATA	ANALYSES
<p>The exclusive cooperative and non-profit forms of tenure in the Milton Parc project will result in a particular kind of population displacement and replacement: a dismemberment of the neighborhood at both ends of its social spectrum. Specifically, the minority who can afford and want private ownership will move elsewhere to find it, and low-income tenants who do not want to join cooperatives and/or subject themselves to revenue control will depart, leaving a more economically and ideologically homogeneous and concentrated social group in the Milton Parc area. When compared with the predevelopment population profile, the new-comer members of the Milton Parc cooperatives will increase the ranks of the young, single, mobile, working class, artist, single-parent family and elderly populations, and decrease the ranks of the professional and ethnic minority populations.</p>	<p>Number and socio-economic status of a) residents and b) workers displaced by the Milton Parc project in c) the Milton Parc project area and d) the adjacent neighborhoods.</p> <p>Number and socio-economic status of a) residents and b) workers migrating into c) the Milton Parc project area and d) the adjacent neighborhoods as a result of the Milton Parc project.</p>	<ul style="list-style-type: none"> <li>• Housing units torn down or declared uninhabitable.</li> <li>• Commercial units torn down or declared uninhabitable.</li> <li>• Census data of number of occupants per unit.</li> <li>• Survey of individuals displaced and who left the areas willingly.</li> <li>• Census data of socio-economic mix (family income, household income, education attainment, age/sex, family structure).</li> <li>• Census data of ethnic mix.</li> <li>• Mobility data.</li> </ul>	<ul style="list-style-type: none"> <li>• Pre- and post-Milton Parc project development sociodemographic profiles.</li> <li>• From the survey of those displaced, an analyses to see if they left willingly and their reasons for leaving.</li> <li>• From a sample of people who chose to leave adjacent neighborhoods, analyses to determine if the cause was related to the Milton Parc project.</li> <li>• Comparison of pre- and post-project socio-economic mixes.</li> <li>• Comparison of pre- and post-project ethnic mixes.</li> <li>• Comparison of project area population profiles with those of the adjacent neighborhoods and with Montreal's inner city generally.</li> <li>• Comparison of pre- and post-project locational shifts (intra- and inter-neighborhood, other intra-city, and inter-city).</li> </ul>

vii) Whitepainting Processes

Whitepainting is closely related to the issues raised in the previous section, "Population Maintenance and Mix". It refers to the variety of processes whereby low or moderate income populations are physically and socially displaced as a result of the physical upgrading of an area. While such processes occur in a number of ways and for a variety of reasons, it is quite likely that the Milton Parc project, because of its location, size, and significant upgrading, will catalyze an increased rate and magnitude of whitepainting in the adjoining neighborhoods.

A research design for assessing the impact of the Milton Parc project on the whitepainting processes in the adjacent neighborhoods is shown in Figure 8.

Figure 8

HOUSING AND SOCIAL CONDITIONS: Milton Parc Project Impact on Whitepainting Processes

HYPOTHESES	INDICATORS	DATA	ANALYSES
The physical upgrading of the Milton Parc area will result in an increased rate of whitepainting in the adjacent neighborhoods. This will take the form of an increased rate of low and moderate income population displacement and, as a result of conversions and demolitions, a decrease in the total population and in the total housing stock in these areas.	Changes in the number and percent of units financially accessible to the low-income population.	<ul style="list-style-type: none"><li>• Number and socio-economic status of renters migrating from and to adjacent neighborhoods.</li><li>• % renters paying 25% or more of their household income for rent.</li><li>• Reasons homeowners are leaving/arriving into these areas.</li></ul>	<ul style="list-style-type: none"><li>• Pre- and post-Milton Parc project migration from and to adjacent neighborhoods, by socio-economic status and reasons for leaving/arriving.</li><li>• Rent/income ratios for renters.</li></ul>

DEVELOPMENT STRATEGY

viii) Financial Effectiveness



Figure 9

DEVELOPMENT STRATEGY: Milton Parc Project Financial Effectiveness

HYPOTHESES	INDICATORS	DATA	ANALYSES

ix) Contiguous Area Development

Figure 10

DEVELOPMENT STRATEGY: Milton Parc Project Contiguous Area Development

HYPOTHESES	INDICATORS	DATA	ANALYSES

x) Tenure Choice

Figure 11

DEVELOPMENT STRATEGY: Milton Parc Project Tenure Choice

HYPOTHESES	INDICATORS	DATA	ANALYSES

xi) Physical and Social Preservation

Figure 12

DEVELOPMENT STRATEGY: Milton Parc Project Physical and Social Preservation

HYPOTHESES	INDICATORS	DATA	ANALYSES

POLICY AND PROGRAM ISSUES



xii) Cooperative Housing Program

Figure 13

POLICY AND PROGRAM ISSUES: Milton Parc Project Use of Cooperative Housing Program

HYPOTHESES	INDICATORS	DATA	ANALYSES

xiii) Non-Profit Housing Program

Figure 14

POLICY AND PROGRAM ISSUES: Milton Parc Project Use of Non-Profit Housing Program

HYPOTHESES	INDICATORS	DATA	ANALYSES

xiv) Effectiveness of Targeting

It is already known that the impacts of the Milton Parc redevelopment did not fall evenly across the community. As a result of the changes, benefits were enjoyed and losses were suffered in various ways and to various degrees by many different groups, such as residents who supported cooperative and non-profit group formation versus those who did not.

Evaluation of the Milton Parc project, therefore, should not be limited to estimating community wide impacts. They should also attempt to identify significant impacts on distinct clientele groups within the community, - and particularly those to who the public programs and policies utilized were targeted -, and preferably on groups displaced by the project as well.

Identifying impacts on various target or clientele groups should help clarify how the beneficial and detrimental effects of the development are distributed and prevent a negative effect on one group from being offset by a positive impact on another. The negative impact may not be noticed if the impacts are reported as an average across all groups. As well, knowing the extent to which the target groups intended in the public programs used were reached is central to an accountability of the funds expended.

For the Milton Parc project, different clientele groups need to be considered. These include:

- groups displaced from the neighborhood during the project, and particularly those who left because of the project;
- the low income population in the neighborhood;
- the elderly population;
- ethnic minorities;
- single-parent families.

Figure 15

POLICY AND PROGRAM ISSUES: Milton Parc Project Use of Effectiveness of Targeting

HYPOTHESES	INDICATORS	DATA	ANALYSES

B.2 OUTPUT: CONTENT, FORMS AND CLIENTSHIP

In general, evaluation measures for the Milton Parc project should be displayed for decision makers and the public in a readily understandable, nontechnical format. Highlights should be presented in a few charts that summarize impacts on various client groups and in relationship to specific impact areas, and which show the cumulative effects on potential future development as well as on governmental operations, policies and programs. Merely presenting vast quantities of technical data is not likely to improve decision making; the findings need to be distilled and translated.

**Part C**  
**TEAM ORGANIZATION AND MANAGEMENT**  
**AND RESOURCE REQUIREMENTS**

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**Part D**  
**CONCLUSIONS AND RECOMMENDATIONS**

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## Appendix

### OTHER EVALUATION AREA CONSIDERED

In addition to the evaluation areas presented in Figure 1, a number of others were considered but deemed less suitable for a variety of reasons. For example, some were obviously of lesser importance than those selected; with others it was uncertain who would use the study results; and some appeared to present particularly difficult data collection problems.

Some of these less suitable evaluation areas are presented below. To mention even briefly these alternative issues underscores the earlier point that institutional and professional judgements of what is important locally should influence the compilation of the list of evaluation areas and measures to be used.

#### AESTHETIC AND CULTURAL VALUES

- Visual Attractiveness of the Development

#### HOUSING AND SOCIAL CONDITIONS

- Social Interaction Patterns and Their Perceived Importance
- Outdoor Activity Patterns and Their Perceived Importance
- Attitudes Toward Neighborhood (such as friendliness or overall desirableness as a place to live or work)
- Crowdedness
- Privacy

#### PUBLIC AND PRIVATE SERVICES

- Hospital Care
- Crime Control
- Fire Protection
- Recreation
- Education
- Local Transportation
- Shopping

#### DEVELOPMENT STRATEGY

- General Planning and Implementation Process
- Renovation Process and Standards
- Property Management
- Commercial Properties

#### COMMUNITY FORMATION AND ORGANIZATION

- Community Control and Access To Decision Making
- Housing Cooperatives' Structure, Formation and Performance
- Non-Profit Groups' Structure, Formation and Performance