THE AFFORDABLE HOUSING “TOOLKIT”

A step-by-step approach to deal with your affordable housing challenges
Acknowledgements

This “toolkit” was produced under the auspices of AUMA’s Housing and Social Development Task Force. Concepts and much of the material found in the different chapters have been freely borrowed from the publications listed in the Reference section, in particular, publications from the Ontario Professional Planners Institute (OPPI) and the International Association for Public Participation (IAP2).

Most of the examples in the “Toolkit” have been taken from affordable housing strategies developed by the Town of Canmore, the City of Edmonton, the City of Calgary and the Town of Cochrane.

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INTRODUCTION

Why We Wrote This Guide

AUMA’s Housing and Social Development Task Force has long maintained that housing and social issues are things that every municipality, to varying degrees, is dealing with today, and will continue to deal with in the future. As communities grow, the issue of affordable housing becomes more pressing as municipalities try to contend with the influx of people, and the need to find these people places to live.

A tremendous amount of work has been done by organizations such as the Canada Mortgage and Housing Corporation (CMHC) researching and analyzing affordable housing trends, options, challenges and solutions. However, most of the research available does not answer some very basic questions that municipal officials, elected and administrative, must be able to answer if they are to tackle the housing challenges they face.

This book, therefore, is intended to be a Handbook; a Toolkit; a Reference Guide; a “Housing for Du**ies” document that provides you with simple, practical, pragmatic suggestions and examples of what to do, when to do it, why to do it and how to do it. We have, wherever possible, included examples from other Alberta municipalities to give you a sense that what we are suggesting really can and does work.

How We Approached the Task

Members from the Housing and Social Development Task Force, in conjunction with AUMA Administration, met in May of this year to discuss the concept of a “Housing Toolkit” – a reference guide that would be comprised of:

- A planning and delivery framework that helps people understand where they are in the Affordable Housing Life Cycle;
- Current practices from other municipalities around the province; and
- Tools, templates, and references that could be used to tackle a particular issue.

This “Toolkit” was developed using information from a variety of sources including:

- Canada Mortgage and Housing Corporation;
- The International Association for Public Participation (IAP2);
• The Regional Housing Affordability Strategy for the (B.C.) Capital Region;
• The Ontario Professional Planners Institute (OPPI) report, “The Municipal Role in Meeting Ontario’s Affordable Housing Needs”;
• The Rural and Small Town Research and Studies Programme at Mount Allison University in New Brunswick;
• The Canmore Community Housing Plan (February 2002); and
• Town of Canmore Affordable and Entry Level Housing Study, March 2003

A complete list of references is provided in Appendix D.

Why Affordable Housing?
The Task Force selected Affordable Housing as the topic for this first “Toolkit” for a number of reasons:

1. Affordable Housing is a Growing Problem
The lack of affordable housing is a growing challenge experienced by many communities, and the problem is continuing to escalate. Evidence of this is found in:

• Growing waiting lists for subsidized rental housing
• Record low vacancy rates in many communities
• Increases in homelessness as shown by drastic increases in the number of people living on the streets in a number of urban centres; and
• Rapidly escalating costs in ownership housing.

This problem is fuelled by a number of factors, including: dramatic cuts in funding for social housing by senior orders of government; the inactivity of the private sector in constructing new rental housing; and the significant decline in traditional affordable housing alternatives (e.g., rooming houses). High growth areas in Alberta are experiencing particular difficulty meeting the demands for affordable housing in their community.

2. The Landscape of Housing Responsibilities is Changing
In the last few years, there has been a significant shift in the focus of responsibility for ensuring the availability of affordable housing to meet the needs of Alberta residents. In the past, most municipalities simply reacted to the policies and funding programs initiated by senior levels of government to create affordable housing. However, the
landscape of responsibilities for ensuring the availability of affordable housing has changed.

Until very recently, the Federal and Provincial Governments had virtually withdrawn from providing funding for social housing. Despite widespread calls by national organizations, such as the Federation of Canadian Municipalities (FCM), for a return to former levels of involvement by senior government, insufficient response has been received to date. The recent introduction of a number of Federal and Alberta Government initiatives dealing with housing, while welcome, fail to address the significant and growing need for permanent, affordable housing in many communities in Alberta.

In view of this situation, the need and opportunity for municipalities to develop coherent, pro-active approaches to the provision of affordable housing have never been greater.

3. There are Social, Economic and Environmental Benefits of a Proactive approach to Affordable Housing

Housing is a cornerstone for building strong communities and access to housing is pivotal to community stability – it is a key determinant of a healthy community. Where and how people live not only affects individual health, but the well-being and character of the whole community.

At the community / local government level

The design of communities, in which housing and housing related services play a significant role, is essential for improving and maintaining quality of life for all residents. In many communities, housing is the single largest land use. Local governments are partners with the community in maintaining the social and economic wellbeing of residents by supporting the development of stable neighbourhoods and a range of life cycle options responding to residents’ housing needs for access, affordability, choice and diversity. They provide supportive community social and physical infrastructure through the provision of: recreational and cultural space and programs, safety and security services; protection from hazards; access (roads, pedestrian and cycling pathways, transit); and community development grants.

At the individual level

Housing at its most basic provides a physical structure that is essential for keeping people warm and dry. Housing that is cold, damp, unsanitary, in poor repair or in an unsafe neighbourhood can contribute to disease or injury.
Housing is a component of socio-economic status – representing the largest monthly expenditure for most households. If housing consumes too much of available income, families or individuals can face difficult choices that can affect their health; e.g., sacrificing the budget for food, clothing, or other necessities, sharing housing with other individuals or families leading to overcrowded living conditions, or working longer hours to cover housing costs.

Housing conditions can either support or disrupt personal social networks, important for maintaining health: having to move frequently because of high housing costs impacts opportunities for employment and training and the ability to sustain social networks. Children in such families are particularly vulnerable to stress, health and dental problems, and at an educational disadvantage that perpetuates the poverty cycle and ultimately the cost to society.

**On a societal / economic level**

High housing costs hinder economic development: residents spending too high a proportion of their income on housing have less money to spend on other goods and services, resulting in significant loss of revenue to local business; high ownership costs and lack of rental accommodation mean than many people who want to buy or rent cannot, potentially creating a less stable work force; housing that is too expensive for average-income households makes it difficult to attract and recruit qualified workers; labour shortages can mean higher construction costs; high housing costs may deter businesses from establishing or locating in the region; and people, including children who grow up in a community, who want to find housing they can afford or improve their housing conditions may have to move away.

High housing costs impact health care and social service costs, already a significant portion of provincial and federal budgets. Yet without adequate housing it is difficult for an individual to maintain health, to access health services or be able to make use of available services. Interventions required for those who do not have adequate housing are generally some of the most expensive in our social welfare system (e.g., health care, income subsidy, and the justice system). The provision of safe, stable housing can reduce many of these costs.

**What is Our Definition of Affordable Housing?**

Affordable housing means many things to many people. The successful development and implementation of a community strategy for affordable housing depends on a clear definition.
Defining affordable housing at the onset will help ensure that any action plans identified meet the affordable housing needs of all segments of the population.

In defining affordable housing, we wanted to ensure that the definition:

- Is easily understood and easily implemented;
- Is aimed at households with low to moderate incomes; and
- Takes into account local income distribution and demographic characteristics.

To this end, the Task Force suggests the following definition for affordable housing. It is based on the concept of “core housing need” developed by Canada Mortgage and Housing Corporation.

*Households are in core housing need if they cannot find somewhere to live that is in reasonably good condition and is big enough for their household without spending more than 30% of their household income.*

In any community, there are two basic dimensions to housing affordability. One dimension is the incidence of core housing need – the number of households who cannot obtain adequate housing without spending too high a proportion of their income for shelter. The other dimension is the degree of difficulty that prospective homeowners face in the housing market because of the cost of housing or the level of mortgage rates or both.

Five questions that will have to be answered as you develop your strategy for tackling your affordable housing challenges are:

1. What are the steps involved in developing and implementing an affordable housing strategy?
2. What level of community participation / community consultation is appropriate and when should it occur?
3. What is our Vision of affordable housing in the community? What type of community do we want to become?
4. How big is the affordability problem in our community and who is in “core housing need”?
5. How do we move from “where we are” to “where we want to be”?

Subsequent chapters to this book will try to provide answers to these questions as well as offer suggestions and examples from other communities.
How This Book Is Organized

The overall organization of this book is designed for easy access for anyone involved in the Community Planning portion of the Affordable Housing Life Cycle (Figure 1). The model shows how the Life Cycle is a continuum whereby municipalities define where they want to be, assess where they are, and then develop a strategy for closing the gap. Implementing the strategy involves both the administrative tasks of implementation (e.g., communication, marketing, financing) and the actual construction of the affordable housing (the Community Projects cycle). Throughout this process, ongoing community consultation takes place to ensure that the community is included in the decision making process and provides feedback into subsequent planning cycles.

Affordable Housing Life Cycle

Figure 1
The Toolkit is divided up into the following sections:

**PART I: COMMUNITY PLANNING OVERVIEW**

This part provides an overview of the “Community Planning” process. The planning process and the key elements of developing and implementing an Affordable Housing Strategy are described. This framework then forms the basis for the subsequent chapters of the book.

**PART II: COMMUNITY CONSULTATION / PARTICIPATION**

Public consultation and participation are critical components in developing and implementing an affordable housing strategy. This section of the Toolkit provides examples of techniques that can be used throughout the planning process.

**PART III: SETTING THE DIRECTION**

This part starts with a basic overview of why a Vision for affordable housing is so important. It provides examples of vision statements from other municipalities, and talks about the process others have used to develop these visions. Included is a checklist outlining who should be involved in the process and the steps you should follow. By the end of this section, if you follow the steps identified, you should be able to answer the question, “Where do we want to be?”

**PART IV: ASSESSING THE NEED**

This part starts by providing an overview of the Needs Assessment process. Questions you need to answer and checklists you can use are included in this section.

Answering questions about your community’s housing affordability problem must then be related back to your community’s vision. Knowing where you are relative to where you want to be gives us the “gap” and helps identify action plans and strategies for closing the gap.

**PART V: BUILDING THE STRATEGY**

Once you know where you are and where you want to be, you can start putting together action plans for “closing the gap”. This part provides you with some guidelines as to what your strategy should include, and some examples of the types of actions you may want to consider, depending on your unique situation.

**PART VI: IMPLEMENTING THE STRATEGY**

This part provides an overview of things you can do to move forward on your affordable housing strategy. Included is a section on “NIMBY”, Marketing” and “Measurement”.

**PART VII: FINAL THOUGHTS**

This part provides some final thoughts on Affordable Housing.
APPENDICES

Appendix A is a Public Participation Toolkit developed by the International Association for Public Participation (IAP2). Appendix B provides lists of things you need to consider or do at each step along the way. Using checklists, we provide a quick set of reference sheets that you can use at any point in the life cycle to see if you have covered off all the bases before you move forward. Appendix C is a glossary of terms commonly used in the affordable housing arena. Appendix D provides a list of reference material, including websites and publications that you can use to further investigate areas of interest to you.

Icons Used in the Book

Throughout the book, you will find little pictures – called “icons” – that will direct your attention to information that is especially relevant to you. Here are the icons and a description of what they mean:

- **Example**
  
  Actual examples from other municipalities about how they dealt with a particular issue, or applied a certain technique.

- **Checklist**
  
  Checklist provided for this collection of information in Appendix B at the end of the book.

- **Community Consultation**
  
  Community Consultation is important at this step in the process.

- **Important things to remember**

  Important things to remember.
Where to Go From Here

You can get into this book in a number of ways: you can read it cover-to-cover or start with any chapter of the book and flip to other chapters as needed. Or, you can look up a specific issue in the index and just read about that item.

Many of you probably already know most of the information included in this toolkit. In your case, you may simply want to look for the “Example” icon in the margins to see what others are doing regarding a particular issue.

Regardless how you use the book, please pass on any feedback you have to:

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or email us at:

main@auma.ab.ca

Your feedback will be reviewed and considered for inclusion in future versions of the document. Our goal is to ensure that this “Toolkit” evolves over time to meet the needs of those tasked with addressing the affordable housing challenges in our communities both today and in the future.
PART I: COMMUNITY PLANNING

OVERVIEW

Given that you are reading this book, we will assume that your municipality has decided to develop and implement an affordable housing strategy for your community. Assuming that the funding is in place to develop the strategy, there are a number of elements that are important to crafting a successful plan. These are described in this section.

Chapter 1 – Achieving Success

Crafting a successful affordable housing strategy requires more than words on a page. It must be proactive (e.g., commits resources, initiates programs, creates partnerships). It must bring together the entire community to work towards a common goal. It is a living, breathing, ongoing process.

Before embarking on the development of the strategy, everyone involved must understand the underlying factors critical to the success of such an initiative. The person managing the process, in particular, must appreciate “what it takes” to achieve meaningful results.

Achieving success in developing an effective community affordable housing strategy requires:

• **Defining affordable housing in your community up front**
  
  “Affordable housing” can mean different things in different communities, depending on their size, location and socio-economic characteristics. Success at meeting affordable housing needs means providing a clear definition upon which to focus efforts.

• **Setting fundamental community goals and objectives**
  
  The community must agree at the outset on the overall vision toward which the plan is aimed and the fundamental goals and objectives to be met in order to achieve this vision.

• **Knowing the facts and where to find them**
  
  Effective solutions require a strong understanding of current and future affordable housing needs and gaps and the reasons for them. Early on in the process, you must define the range of data and information required to develop this understanding, identify and access the sources for this material and develop appropriate frameworks for analysis.

• **Knowing and involving your partners**
  
  Successfully involving community partners means understanding the interests of all local stakeholders and bringing them into the process in a meaningful way.
• **Bringing Council on board**
  All members of the municipal council must have a full understanding at the outset of the purpose and nature of the plan and the types of decisions they will be challenged to make. They should be actively involved and informed on a regular basis throughout the process.

• **Ensuring municipal departments pull together**
  Successfully meeting affordable housing needs means ensuring consistency and “buy-in” amongst all municipal departments. Having the finance department raising development charges or the building department raising construction standards while the affordable housing strategy is being prepared can undermine the process. Different departments bring a variety of perspectives, experience and approaches. All municipal departments need to be actively involved throughout and need to support the recommended directions, strategies and plans.

• **Understanding tools and legislation**
  This toolkit will outline nine approaches that municipalities can use to address community affordable housing needs. All participants need to understand the full range of approaches and how they can be applied within a comprehensive and consistent framework to achieve meaningful results.

• **Choosing practices suited to your community**
  Numerous community practices are in use in Alberta and elsewhere to help meet affordable housing needs. Not all such practices are appropriate or suitable for all communities. These and other practices that may be identified during the planning process need to be considered from a local perspective and the most suitable approaches incorporated in to your Community Affordable Housing Strategy.

• **Incorporating more than one approach**
  Affordable housing needs are complex and varied. So are the solutions. Success means tackling affordable housing needs on many fronts with a variety of approaches and initiatives.

• **Integrating measures and initiatives**
  Those measures that are adopted must be well integrated into a comprehensive and consistent plan giving rise to a coherent set of actions and initiatives. You must ensure this integration is achieved in order for the plan to achieve meaningful results.
• **Developing long term and self-sustaining solutions**
  Meeting affordable housing needs takes time. Plans must be aimed at developing self-sustaining solutions that will continue to meet needs over time rather than “quick fixes”.

• **Testing your plan against your definition**
  All elements of the plan must be aimed at affordable housing as defined at the outset of the process. Participants must continually test the plan against this definition to ensure it stays focused and on-track.

• **Initiating immediate action plans**
  The community needs to be motivated and committed in order to achieve local “buy-in” vital to success. The plan needs to include some immediate actions that will show results, excite interest and bring support.

• **Committing resources**
  “All talk and no action” will not bring success. The plan must clearly identify dollars, staff, time commitments and other contributions required from the municipality and local community partners to implement recommended action plans. All parties upon adoption of the plan must commit these resources. There must be a mechanism set in place to ensure all participants meet commitments.

• **“Selling” the plan**
  To achieve buy-in and commitment from the whole community requires designing a communications strategy and then actively getting out into the community to “sell” the plan. The community must be made aware that the plan is a “homegrown” solution that depends entirely on local efforts. The message must be delivered to the community that its fate is largely in its own hands, given the lack of Federal and Provincial support. The community must be convinced to support difficult and sometimes unpopular local decisions in order to achieve meaningful results.

• **Giving the plan a life**
  A successful strategic plan has no ending. Performance must be monitored and results assessed on an ongoing basis. Those measures that are ineffective must be modified or eliminated. Newly emerging ideas and concepts must be considered and applied where appropriate. Changing affordable housing needs must continue to be identified and plans adjusted accordingly. A process of regular review and revision is crucial to sustainability.
Chapter 2 – The Planning Process

The strategic planning process for developing a meaningful Community Affordable Housing Strategy involves a host of important steps and activities. Some municipalities may have already taken some of these steps and are further ahead. Therefore, some may be in a position to move more quickly than others. The entire process is outlined in this chapter.

1. Select a Project Manager and Project Team

The project manager for the development of the strategic plan should be an individual who is knowledgeable about housing policy, socio-economic analysis, municipal structure and the community planning process. The individual should also be enthusiastic, creative, a great motivator and a good project manager. A supporting project team to assist in fact finding, producing materials and handling day-to-day administrative aspects of the process should also be assembled and ready.

2. Establish Reference (or Steering) Committee

This is one of the most critical steps in the process. The Reference Committee must contain a blend of:

- Community representation (including local politicians)
- Differing sectors (e.g., public, private, not-for-profit)
- A wide range of municipal departments (e.g., planning, housing, real estate/property, finance, legal, community services)
- Communications ability

Members of the Reference Committee must see themselves as not only the drivers of the process, but a team with the courage to challenge the community and the commitment to stand behind their ideas.

The project manager must consult with individuals across the community to identify those persons capable of bringing the above elements to the Reference Committee and prepared to make the necessary commitment to the process.
The Town of Cochrane Affordable Homes Task Force

Cochrane Family & Community Support Services (FCSS) representative
Cochrane Society for Housing Options representative
Cochrane Partnership for Economic Development (CPED) representative

Town of Cochrane Staff
- Director of Community and Protective Services
- Director of Planning and Engineering Services
- Senior Planner, Planning and Engineering Services

Town Councillors (2)

Members-at-Large
- Local Developer
- Local Realtor
- Mortgage Broker
- Cochrane Women’s Housing Committee (2)
- Reporter from local newspaper
- Private citizen

3. Develop Terms of Reference for Reference Committee and Project Team

All participants need a clear understanding of their roles and responsibilities. The project manager must carefully define these at the outset to ensure all participants will know what is expected of them. The terms of reference must also set out clear guidelines on process – e.g., flow of information, reporting channels, decision-making, communications protocol and so on. Terms of Reference should be reviewed and finalized by the members of the Reference Committee and Project Team.

The Canmore Community Housing Plan is designed to provide an overall strategy for the Town to follow in addressing the community’s affordable housing issues. The purpose of this Plan is:

1. To provide to the Town of Canmore and its residents a public document that articulates the direction and priorities of the Canmore Community Housing Corporation (CCHC);

2. To provide a basis for community consultation and feedback;

3. To identify gaps in the current and future supply of affordable housing in Canmore;

4. To provide recommendations for Town Council and the Canmore Community Housing Corporation directed at increasing the supply of affordable housing in Canmore; and

5. To support funding requests to the Provincial and/or Federal Governments for affordable housing program assistance.
4. **Conduct a Visioning Session**

The community must see a vision of what this plan is trying to achieve. At the outset of the process, the Reference Committee must articulate this vision, including determining a clear definition of affordable housing as the underlying basis for the plan. The Reference Committee must set out broad goals and objectives crucial to achieving the vision. These should be immediately communicated across the community, so that all efforts can be pointed in this direction. Community consultation is covered in Chapters 3, 4 and 5. Visioning is covered in more detail in Chapters 6 and 7.

5. **Undertake Fact Finding**

A key success factor in developing a strategic plan is knowing the facts – identifying needs, understanding gaps, and projecting future trends. The project manager, Reference Committee and project team should all be actively involved in this step to develop a first-hand understanding of the facts and to be better able to communicate them to the community.

Data sources should be identified early on and pursued aggressively. Emphasis should be placed on local sources and observations wherever possible, rather than relying strictly on broad-based measures and statistics. Information must be as up-to-date as possible. Get out and talk to people, visit problem areas, conduct discussion sessions, organize focus groups. This topic is covered in more detail in Chapter 8.

6. **Hold a Public Information Sharing Session**

When the vision has been defined and fact finding completed, hold a widely advertised public information sharing session. This will help establish linkages with the community, spread awareness about the facts, test reaction to the vision developed by the Reference Committee and identify potential community partners and resources.

7. **Crystallize the Issues**

The vision has been defined, facts have been gathered, needs identified and community viewpoints expressed. From this process, a set of issues will emerge around the range of affordable housing needs facing the community. These issues need to be clearly defined and understood by all participants and by the community as a whole. They will ultimately form the framework around which strategies will be developed. This topic is covered in Chapter 9.
8. **Identify Community Partners and Strategies to Communicate with Partners**

Identify specific community partners who can make a difference – private developers, not-for-profit housing providers, social agencies, corporate supporters, media representatives, architects and planners, service clubs, religious organizations, ratepayer groups, prominent individuals. Develop strategies for communicating with them and convincing them of their potential role in addressing various issues and achieving the vision.

9. **Establish Subcommittees to Develop Action Plans for Each Issue**

The most effective approach to strategic plan development is one that focuses on key issues and sets in place a series of directions and initiatives for each comprehensive and consistent strategy.

Depending on the size of the Reference Committee, it could be organized into subcommittees responsible for addressing each issue. Each subcommittee should also contain a member of the project team. The project manager should actively contribute to as many subcommittees as possible. Additional community partners should be recruited to participate in subcommittees where appropriate in order to enhance the potential for achieving meaningful solutions.

10. **Develop Action Plans**

Each subcommittee should examine their issue in depth, determining what directions are most appropriate for resolving the issue, identify which tools and practices will be most effective in achieving the desired directions and set out specific action plans to be implemented. This topic is covered in more detail in Chapter 10.

11. **Integrate Action Plans into a Comprehensive Affordable Housing Strategy**

The project manager, assisted by the Reference Committee and the project team, pulls together the individual action plans into a comprehensive affordable housing strategy. All action plans must be reviewed for consistency to ensure no conflicting approaches are being recommended. Chapter 11 discusses some of the choices that you need to make in finalizing your affordable housing strategy.

12. **Identify Specific Responsibilities, Partners, Resources, Timelines and Expected Results**

These action plans must identify specific responsibilities, community partners to be involved, required resources, timelines, and expected results. Again, the project manager
is primarily responsible for ensuring these plans are well integrated, consistent and mutually supportive.

13. Hold a Public Forum

When the draft comprehensive affordable housing strategy has been developed and resources identified, hold a widely advertised public forum. Local councillors should be invited to this public forum and, if appropriate, requested to speak in support of the strategy. This will help establish further linkages with the community, spread awareness about the facts, communicate an understanding of the issues, test reaction to the action plan, and confirm community partners and resources. The local councillors and the community as a whole should be invited to provide comments on the proposed strategy. Chapter 12 discusses one of the critical issues you may have to deal with in a public forum setting.

14. Finalize Community Affordable Housing Strategy

Comments received from local councillors and the community must be incorporated into the final affordable housing strategy to be implemented by the local community. The references listed in Appendix D include examples of Affordable Housing Strategy documents for other municipalities.

15. Develop and Implement a Communication Strategy to Sell the Plan

“Selling” the plan is as important as creating the plan. The entire community must see the plan as a possible and necessary step in meeting important local needs. Those being asked to contribute resources must be motivated and committed to come forward. Those being challenged to make difficult decisions must be convinced to make them.

The Reference Committee should determine the best approaches for communicating the contents of the plan to the community and actively seek buy-in. Typical approaches might include press releases, local radio and television sessions, printing and distributing easy-to-read materials, speaking engagements by members of the Reference Committee, Council presentations and so on. This topic is covered in Chapter 13.

16. Establish Monitoring Process

A strategic plan is not static. The effectiveness of strategies and action plans must be measured and approaches revised as appropriate. Changing needs and issues must be identified. Further resources must be found. New concepts and practices must be identified and applied. The plan must
contain a monitoring process that will be undertaken on an ongoing basis. This topic is covered in Chapter 14.

Figure 2 brings together the identified process and key elements of a community affordable housing strategy.

**Process & Elements of a Community Affordable Housing Strategy**

- Select Project Manager and Team
- Establish Community Reference Committee
- Develop Terms of Reference
- Conduct Visioning Session
- Undertake Fact Finding
- Hold Public Information Sharing Session
- Crystallize Affordable Housing Issues
- Identify Community Partners
- Establish Subcommittees
- Develop Action Plans
- Integrate Action Plans into a Strategy
- Identify Resources, Timelines and Results
- Hold Public Forum
- Finalize Affordable Housing Strategy
- Develop and Implement Communications Plan
- Establish Monitoring Process

Figure 2
PART II: COMMUNITY CONSULTATION / PARTICIPATION

Community involvement in the development and implementation of an affordable housing strategy is a necessity. However, this involvement can be positive or negative (see Chapter 12 – NIMBY). Ideally, we want the community to be strong advocates of the affordable housing strategy. This section outlines some of the principles and techniques that can be used to ensure that the participation is on the positive end of the spectrum.

Chapter 3 – The Practice of Public Participation

How many of you knew that an Association existed that focused specifically on the area of Public Participation? The International Association for Public Participation (IAP2) is “an association of members who seek to promote and improve the practice of public participation in relation to individuals, governments, institutions, and other entities that effect the public interest in nations throughout the world.” As an international leader in public participation, IAP2 has developed the “IAP2 Core Values for Public Participation”. The purpose of these core values is to help make better decisions which reflect the interests and concerns of potentially affected people and entities.

The Core Values are:

1. The public should have a say in decisions about actions that affect their lives.
2. Public participation includes the promise that the public's contribution will influence the decision.
3. The public participation process communicates the interests and meets the process needs of all participants.
4. The public participation process seeks out and facilitates the involvement of those potentially affected.
5. The public participation process involves participants in defining how they participate.
6. The public participation process provides participants with the information they need to participate in a meaningful way.
7. The public participation process communicates to participants how their input affected the decision.

(www.iap2.org)

As you begin the development of your affordable housing strategy, or any project that affects your community, keep in mind these core values.
**Chapter 4 – The Public Participation Spectrum**

The term “public participation”, like “affordable housing”, can mean different things to different people. For some, it means holding an Open House to tell the community what is being contemplated. For others it can mean Citizen Advisory Committees and Consensus Building Workshops.

So how do you decide what is right for you? IAP2 has established a Public Participation Spectrum (reproduced below) as a guide to determine what level of participation is appropriate.

### Increasing Level of Public Impact

<table>
<thead>
<tr>
<th>Inform</th>
<th>Consult</th>
<th>Involve</th>
<th>Collaborate</th>
<th>Empower</th>
</tr>
</thead>
<tbody>
<tr>
<td>To provide the public with balanced and objective information to assist them in understanding the problems, alternatives and/or solutions.</td>
<td>To obtain public feedback on analysis, alternatives and/or decisions.</td>
<td>To work directly with the public through the process to ensure that public issues and concerns are consistently understood and considered.</td>
<td>To partner with the public in each aspect of the decision including the development of alternatives and the identification of the preferred solution.</td>
<td>To place final decision-making in the hands of the public.</td>
</tr>
</tbody>
</table>

#### Promise to the Public:

<table>
<thead>
<tr>
<th>Inform</th>
<th>Consult</th>
<th>Involve</th>
<th>Collaborate</th>
<th>Empower</th>
</tr>
</thead>
<tbody>
<tr>
<td>We will keep you informed.</td>
<td>We will keep you informed, listen to and acknowledge concerns and provide feedback on how public input influenced the decision.</td>
<td>We will work with you to ensure that your concerns and issues are directly reflected in the alternatives developed and provide feedback on how public input influenced the decision.</td>
<td>We will look to you for direct advice and innovation in formulating solutions and incorporate your advice and recommendations into the decisions to the maximum extent possible.</td>
<td>We will implement what you decide.</td>
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</table>

#### Example Tools:

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<tr>
<th>Inform</th>
<th>Consult</th>
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<tr>
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<td>Public comment</td>
<td>Workshops</td>
<td>Citizen Advisory Committees</td>
<td>Citizen juries</td>
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<td>Web sites</td>
<td>Focus groups</td>
<td>Deliberative polling</td>
<td>Consensus building</td>
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<td>Open houses</td>
<td>Surveys</td>
<td>Participatory decision making</td>
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<td>Delegated decisions</td>
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<td>Public meetings</td>
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*(www.iap2.org)*

**Note:** these example tools are cumulative. Each category to the right includes tools used in the categories on the left.
Using the spectrum, municipalities can decide what they want to accomplish through their public consultation / participation process, and then determine which tool may be most appropriate for achieving the objective. However, no matter what approach you choose to take, make sure you communicate your choice (or choices) to the other stakeholders. Make sure that people don’t believe they are being “empowered” when in fact they are only being “consulted”.

As the IAP2 Spectrum document says, “At all public participation levels, promises should be clear – and promises should be kept.”

Appendix A has the complete “IAP2 Public Participation Toolbox” which includes:

- Techniques to share information;
- Techniques to compile input and provide feedback; and
- Techniques to bring people together.

**Chapter 5 – Who Participates?**

Now that we know that public participation is required, and we have some idea of the goals, tools and techniques that we can use in our public participation process, who should we invite to participate? The following is a suggested list of groups you should consider.

- Community residents (both owners and renters)
- Local businesses
- Builders / developers / realtors
- Local housing authority (if one exists)
- Representatives from relevant municipal departments
- Members of Council
- Rental property owners
- Financial institutions
- Chambers of Commerce
- Non-profit Community Developers
- Community and Social Services groups
- Religious organizations
- Community groups

Some of these groups will be represented on your Reference Committee. Others will participate at different points in the planning and implementation process. Ideally, the Terms of Reference for your Affordable Housing Strategy will have a “responsibility matrix” that shows who is involved, when and for what purpose. Identifying this at the beginning of the project will greatly increase the likelihood of success by ensuring that all stakeholders are participating in an appropriate manner.
# Calgary Stakeholders in Affordable Housing (2002)

<table>
<thead>
<tr>
<th></th>
<th>IMAGINE &amp; OPERATION</th>
<th>ADMIN OF RESOURCES</th>
<th>DIRECT FUNDING &amp; EXP/T</th>
<th>STRATEGIC PARTNERSHIPS</th>
<th>RESEARCH</th>
<th>PLANNING &amp; REGULATION</th>
<th>COMMUNITY DEV'T &amp; EDUCATION</th>
<th>ADVOCACY</th>
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9/18/2003
PART III: SETTING THE DIRECTION

“If you don’t know where you are going, any map will do.”

Lewis Carroll

Meeting affordable housing needs is a complex problem that cannot be solved with one simple solution. It must be addressed from a variety of directions, using a wide range of ideas, tools and resources. To be fully effective, these must be brought together in a comprehensive, coherent and consistent manner. The most meaningful solutions must involve all community partners and integrate mutually supportive concepts, strategies and initiatives.

Meeting affordable housing needs cannot be accomplished overnight. It is a long-term process. It requires continuous attention, adjustment and action. A critical element to being successful, however, is ensuring that you have a clear picture of where you are heading.

Chapter 6 – Developing a Vision

A Vision for the Future

“The B.C. Capital Region Receives Accolades”

In Victoria's Capital Region, various interests have really worked together to make the region a special place to live for everyone. Faced with housing affordability issues a decade ago, the community has rallied to collaborate and respond with energy and enthusiasm. The results are impressive:

- Young families with children have greater choices of more affordable rental housing or ownership opportunities with legal secondary suites to help them with mortgage payments.
- Seniors have a wide range of housing choice from independent living through supportive housing to care accommodation.
- Singles on lower incomes can choose between secondary suites in family neighbourhoods, or renting attractive, small units, or other housing tenure options in neighbourhoods close to services and public transit.

In accepting the accolades, the Chair of the CRD echoed the sentiments of the vast majority of residents when she said, “Thank goodness the community had the conviction to act in 2003. With the quality of life we have built, we are deservedly the envy of other Canadian communities – it goes beyond our weather, scenery and gardens. Why would anyone want or need to move?”

Victoria Times Colonist, June 12, 2013

* From “A Regional Housing Affordability Strategy for the Capital Region”
If you were asked to create a similar “newspaper article” for what your community would look like 10 years from now, how similar or different would it look to the one referenced here? This is really where visioning starts.

*Think about your community 10 years from now, and describe how it would look from an affordable housing perspective.*

Reading the excerpt above, it is obvious that this region of Vancouver Island has thought through what it wants to see in the future. Some specific things to note are:

- The strategy specifically identifies its target residents – young families with children, seniors and singles on lower incomes;
- The strategy specifically talks about the types of affordable housing options being considered:
  - Affordable rental housing;
  - Houses with legal secondary suites;
  - Independent living, supportive housing and care accommodation;
  - Other housing tenure options.
- The emphasis on the community working together in a collaborative manner.
Chapter 7 – Establishing Goals and Objectives

The best way to define the process of establishing goals and objectives for your affordable housing strategy is by way of example. The following information is taken from The Regional Housing Affordability Strategy for the (B.C.) Capital Region.

**THE VISION**
Improved housing affordability for residents of the Capital Region

**THE GOAL**
To improve housing affordability and ensure the availability of a reasonable choice of housing by type, tenure, price and location, especially for low and moderate-income households, the elderly, youth, those with special health and other needs, and the homeless, over both the short and long term.

**THE STRATEGIC PRINCIPLES**
- community based
- sustainability
- flexibility
- inclusivity
- choice
- educational
- creativity

**THE OBJECTIVES**
- To create a policy and regulatory environment that will increase the supply of more-affordable housing.
- To increase the availability of funds for more-affordable housing.
- To promote and facilitate community partnerships and individual support and that will improve housing affordability.
- To focus on meeting the needs of those in Core Need, especially low-income renters.
- To prevent homelessness and support the transition out of homelessness.

The key elements of this example are:

- **Vision** – a statement of your communities “preferred state” at some point in the future; adjectives (e.g., “increased”, “improved”, “reduced”, “thriving”, “safe”) are typically used to describe this future state, but remember, if you use an adjective, the expectation is that outcome measures will be created to determine if you have in fact achieved this vision.

- **Goal** (sometimes referred to as a Mission Statement) – Generally answers the questions “what will you do” and “for whom?”

- **Strategic (or Guiding) Principles** – these words (or sentences) describe those things that will be used to guide decision making; as ideas are generated or recommendations made, you will review them to determine if they adhere to these underlying principles (e.g., if a recommendation is made to ONLY consider
adult-only rental units, it does not adhere to the Principles of “flexibility” and “choice”).

Principles should clearly support both the Goals and the Vision for the community.

- **Objectives** – these statements further refine the Goal by describing specific areas that the strategy will focus on. Objectives can cover a cross-section of areas such as advocacy, policy, funding, cooperation and communication.

Once these elements are defined, you are in a position to move on to the next step in the process which is to understand the current state of housing affordability within your community.
PART IV – ASSESSING THE NEED

“If you don’t know where you are, a map isn’t going to help.”
Author Unknown

Before any municipality can decide upon an effective affordable housing program, it must evaluate the housing stock in the community.

- Does the community’s housing meet the needs of current residents?
- What type of housing is in greatest demand?
- What issues are preventing the community from satisfying the demand?

Answering these questions and others will help shape the type and extent of the affordable housing program that your community chooses to implement. The needs of residents and future populations should also be considered, particularly if the municipality is seeking to attract new businesses to the community.

Needs assessments can be accomplished in a myriad of ways and be performed by several different entities. Many municipalities use their existing comprehensive plans to understand the current state of affordable housing and determine next steps. Other municipalities have created an affordable housing task force while still others have contracted the work to local universities and community development practitioners.

Every community is different, even neighbouring ones. These points should be considered when developing long-range goals. It often benefits every aspect of a community’s growth when affordable housing needs assessments are completed within the context of total community development. In conducting a needs assessment a few of the many issues to consider are who will conduct and fund the needs assessment, what will be done with the results of the needs assessment, to whom the results will be made available, and how often needs assessments will be completed.

The second step in developing a strategy for affordable housing within your community is assessing where you are. This step has two main components:

- Data Gathering; and
- Crystallizing the Issues.
Chapter 8 – Data Gathering

In order to build an effective affordable housing strategy, you must be able to describe the basic characteristics of your community, in particular its residents and housing stock. A wide variety of demographic data is available including income, education and age. The most complete source of demographic data is probably the 1996 Census, available from Statistics Canada.

Once the data has been selected for analysis, you can prepare a basic description of the community. This description could include a comparison to other municipalities in the province of similar size or socio-economic make-up. Certain demographic and housing may be particularly important to your affordable housing strategy. For example, an insufficient supply of modest rental housing impacts the labour market as prospective employees face higher costs when considering relocating to the community.

The biggest drawback to using Census data is its age and the fact that a community may have changed a great deal since the census was conducted. The only available updates of this data are marketing studies performed by municipal staff or consulting firms. However, an investment of time and money at this stage of the process to get an accurate picture of your current state will ensure that any strategies for going forward are based on good information.

There are three questions you want to answer as part of your data gathering process:

- How big is the affordability problem in the community?
- Who is in core housing need and where do they live?
- Why has the housing problem developed?

Answering these questions will give you a basic level of understanding of the nature of the challenges you face.

The City of Edmonton, as part of its review of affordable housing in the City, reviewed housing needs. Using CMHC estimates of housing need (based on 1996 census data), the Task Force conducting the review determined that the vast majority of need in the City is among renters and relates to affordability. Based on this information, and other analysis conducted by the Task Force, the City identified specific actions to address the issue of affordable rental units in the community.
Chapter 9 – Crystallize the Issues

You’ve completed the data gathering process. So what conclusions can you draw from this analysis? Some of the questions you should be able to answer include:

- Are we developing the right type of housing?
- Is availability of land an issue?
- Are we being too restrictive by not allowing innovation in subdivisions?
- Do our existing bylaws need to be modified?
- Are our development standards too high?
- Do our review and approval processes need to be streamlined?
- Should we consider levying fees on other types of development to pay for affordable housing?
- Should we offer financial incentives to promote the development of affordable housing?

In answering these questions, you will begin to highlight the challenges you face, and put your affordable housing problem in context. This chapter provides a few examples of the challenges that certain municipalities face and the conclusions they have drawn based on their analysis of the data.

Supply versus Demand

Housing affordability has been a growing issue in Canmore since the 1980’s. The issue is mainly the result of supply not meeting demand – the supply of lower-end market and non-market housing is lower than actual demand.

**FACTORS AFFECTING DEMAND**

Canmore is experiencing the impacts of two general trends. The first is the growing number of urbanites moving out of the city and into small towns in search of a slower pace of life, easy access to outdoor recreation and leisure, and scenic beauty. The second is the growing affluence and aging of the Baby Boom generation. This age cohort is purchasing secondary homes either as seasonal vacation homes or as future retirement homes (often both). The combination of Canmore’s location and Alberta’s economic prosperity over the past decade has increased the impact of these two trends and its appeal to an international marketplace.

At the same time, increased service and hospitality sector activity has resulted in an influx of lower-paid workers, many of whom are also attracted to the mountain lifestyle. These workers are unable to afford the high cost of local housing.
FACTORS AFFECTING SUPPLY
Due to Canmore’s mountain location and popularity, the cost of land is higher than in other small towns. Thus housing prices tend to be higher. Topographical constraints and coal undermining make servicing residential land more expensive which is reflected in the cost of individual lots. Canmore also has a limited supply of developable land due mainly to environmental considerations.

THE IMPACT OF THOSE FACTORS
Together, these supply and demand factors have resulted in a high demand for new residential development catering to higher income ex-urbanites and vacation / retirement home purchasers and a limited capacity to supply homes for lower-income households. At the same time, Canmore has seen changes in the Town’s population, demographics and income levels. The housing issue must be addressed or Canmore will continue to lose the very individuals and families it needs to maintain a healthy and diverse community.

From “Canmore Community Housing Plan”, February 2002

Type of Affordable Housing

HOUSING NEED IN EDMONTON
Overall, with a growing population, there will be increased demand for rental dwellings as well as increasing pressure on rent levels, especially at the lower rent ranges.
The lack of affordable rental development has long-term consequences on future growth and the quality of life, particularly for younger Edmontonians.

- Housing costs and prices in Edmonton are rising faster than personal incomes. As this gap widens, the next generation of buyers faces greater difficulty in enjoying the benefits of homeownership. The greatest impact is on households with low and fixed incomes – mainly renters.
- While many voters and municipal citizens own their own homes and see rising house prices as a positive trend, this has a negative impact on many citizens, and their difficulties undermine the overall quality of life of the City. Concentrated poverty contributes to substandard housing and neighbourhood decline – which scars some areas of the City and impacts on all residents.
- Younger skilled workers are valuable to the City; however, they are mobile and will gravitate to areas which provide the best opportunity, quality of life and affordability. An insufficient supply of modest rental housing impacts the labour market as prospective employees face higher costs when considering relocating to Edmonton and young individuals just starting out in the work market have difficulty finding housing that they can afford at entry level wages.
- The failure to take a strategic perspective on community development and on investment in our housing stock can have long term consequences on the desirability of Edmonton as a place to live, work, learn and play.

From “Improving Opportunities for Affordable Housing in Edmonton”, February 2003
Land Costs and Land Availability

The most significant variable contributing to higher housing costs in the B.C. Capital Region is the cost of land.

To make matters worse, land costs will further *increase* as the supply of developable land inside the Regional Urban Containment and Service Area diminishes, exacerbating the problem for lower income households. RGS forecasts indicate that all capacity for single detached/duplex units will be consumed by 2011 (or earlier). Capacity for townhouse units will also be exhausted before 2026.

From “A Regional Housing Affordability Strategy for the Capital Region”, July 2003
PART V – BUILDING THE STRATEGY

A strategic plan can change how we think, act and communicate – it addresses the future impacts of present decisions. A strategic plan is a highly suitable vehicle for addressing community affordability housing needs because it:

- **Provides a long-term perspective** – Although short-term progress is crucial, solutions must be sustainable;
- **Gives direction** – All community partners must understand where to focus efforts;
- **Is complex and iterative** – Affordable housing solutions require multiple approaches and ongoing feedback and adjustment;
- **Is driven from the outside** – Everyone in the community should contribute;
- **Requires courage and risk taking** – Meaningful solutions require innovative thinking and difficult decisions;
- **Improves service** – Successful plans yield clear results;
- **Establishes priorities** – The most urgent needs require the most immediate attention; and
- **Integrates efforts** – Effective affordable housing solutions require comprehensive, consistent approaches involving local planners, all municipal departments and community partners.

**Chapter 10 – Affordable Housing Approaches**

The approaches that municipalities can use to address local affordable housing needs fall into nine fundamental categories, grouped according to level of municipal involvement. Within each category, there are concepts and practices than can assist municipalities in meeting affordable housing needs. The practices most suitable for a given community should be identified, analyzed within a local context and integrated into a comprehensive and consistent strategy.

Some of the approaches identified do not lead to the direct creation of affordable housing (e.g., advocacy, education). Nevertheless, they can be important building blocks leading to the production of affordable housing.

These approaches, and some examples, are included in the chart on the next page.

*NOTE: A successful approach to affordable housing combines many of the items listed within this chapter, not just one.*
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<th>CONCEPTS &amp; PRACTICES</th>
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<tbody>
<tr>
<td>Education and Advocacy</td>
<td>Raise issues and solutions awareness – examples are public meetings, committees, need and trends studies, media, brochures, advocacy with other orders of government</td>
</tr>
<tr>
<td>Remove Barriers</td>
<td>Remove barriers to new private-market affordable housing – examples are streamlining review processes, reducing development standards and requirements, ensuring full range of unit types and sizes, allowing innovation in subdivisions.</td>
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<td>Incentives</td>
<td>Provide incentives for new private-market affordable housing through community plan policy and zoning – examples include density bonus, development credits, density transfer</td>
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<td>Requirements</td>
<td>Make mandatory new private-market affordable housing through master agreements and zoning – examples include Inclusionary provisions, dedicated housing for employees</td>
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<tr>
<td>Fees</td>
<td>Levy fees or taxes on commercial and residential development to be used for affordable housing – examples include “linkage” programs and affordable housing reserve funds</td>
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<td>Municipal Land</td>
<td>Buying land and writing-down land costs for affordable housing provided by private, non-profit or municipal housing corporation</td>
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<td>Private Non-Profits, Co-ops</td>
<td>Assist private non-profits to build affordable housing – rental, cooperatives – through municipal personnel, loans or grants</td>
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<td>Municipal Housing Corporations</td>
<td>Build or buy affordable housing directly through municipal housing corporation, or through partnerships, turnkeys. Restrict resales. 100% or lesser ownership by housing corporation</td>
</tr>
<tr>
<td>Financial</td>
<td>Direct financial benefits to eligible groups: homeowners and renters – examples include second mortgage, deferred taxes, rental deposit</td>
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</table>

The examples on the following pages are all things that Alberta municipalities have done to try and address their affordable housing challenges.
Education and Advocacy

Raising community awareness and knowledge of housing issues is an approach used by many fast-growth or growth-constrained municipalities.

In Canmore, a series of meetings have been held and studies have been undertaken in recognition of the growing concern about housing affordability. A general timeline of these events include:

- Canmore Advisory Committee on Housing, 1990
- Bow Corridor Employee Housing Study, 1992
- Town of Canmore Municipal Housing Committee, 1993
- Adoption of the Growth Management Strategy, 1995
- Canmore Housing Symposium, 1999
- Canmore Housing Needs Assessment, 2000-2001
- Seniors Housing Needs Assessment, 2000
- Seniors Housing Forum, 2000
- Canmore Community Housing Plan, 2002
- Canmore Affordable and Entry Level Housing Study, 2003

Removing Barriers, Providing Flexibility

A number of municipalities, usually working in consultation with the development and building industries, have looked at ways to streamline approval processes, provide zoning flexibility, and reduce onerous development standards or high development fees. If these “barriers” are addressed or removed, private developers have the potential to build more affordably. Generally, these housing units are only affordable to the first homeowner. In a fast-growth or growth-constrained market, these units escalate in value. Subsequent home purchasers and renters do not gain the same advantage as the “first in”.

Canmore has been one of the more active communities in trying new approaches to land use and land subdivision to encourage the private market to build, or maintain, affordable housing.
**Town of Canmore – Cluster Housing**

The cluster style homes were originally used as a means of providing single-family detached housing in areas where land was scarce. The placement of two houses on a single lot reduced servicing costs, but additional benefits were found: those of providing relatively affordable single family housing and providing smaller scale family housing that did not require maintenance on behalf of the owner (due to maintenance being performed by the condominium corporation).

The housing lot configuration utilizes the same lot areas of the previous standard R1B lots, but uses that land more efficiently. In essence, two existing R1B lots are combined and four single-family dwellings, ranging in size from 1,000-1,400 ft² (excluding basement areas and garages) are placed on the lots. The four houses are accessed via a common property driveway. Efficiencies are found through the lower per unit cost of providing infrastructure and an increase in the density permitted on the site. Additionally, for these units to appeal to the local resident market, the architectural controls for the area may be less than the remainder of the subdivision. Three Sisters Mountain Village also requires that the units are provided for sale to local residents first, for a period of 45-90 days. After that period, the units are available to the open market.

**Town of Canmore - Manufactured Home Family Residential District – Grotto Mountain Village**

In the mid 1980s, the Town approved a bylaw that designated a 133 lot subdivision for manufactured homes in the Elk Run area of town on Grotto Road, Grotto Way and Grotto Close. The lots have a minimum lot width of 12 meters and a maximum site coverage of 40%. The homes are required to be placed on a standard foundation or a basement.

While very successful at attracting local residents to this product, prices of these homes have risen in step with the overall real estate market in Canmore, making them less affordable over time. A number of the units with walk-out basements have illegal suites. There is some congestion on local roads due to the additional parked cars associated with the secondary suites.

**Town of Canmore - Narrow Lot Subdivision – Cougar Creek**

In 1993, a narrow lot subdivision at Riverstone in Cougar Creek was granted subdivision approval. There were two phases to the development, with a second subdivision created in 1994. In total, 66 units were created. The development was successful at creating entry level housing for residents of Canmore through the provision of secondary suites and attached suites. These lots were less expensive than other new lots on the market due to the reduced size of the parcels. The increased density of the development also provided economies of scale towards the servicing costs. There have been no serious complaints about this development, except that the narrow lots and smaller houses appear somewhat out of place surrounded by large homes on bigger lots.
Town of Canmore - Z-Lot Subdivision – Peaks of Grassi

In the late 1990s, the town designated 10 lots in the Peaks of Grassi as a Z lot subdivision. In a Z-Lot subdivision, the lot sizes are reduced and the axis of the house is rotated 30-45 degrees. The diagonal positioning of the housing provides the perception of a larger yard. This development proved popular at first with all the units selling quickly. The long steep driveways to the garages at the back of the properties have been an issue. The Z lot concept would likely work elsewhere in Canmore on a more level site.

Town of Canmore - Employee Housing District (EHD)

The Town has encouraged the creation of employee housing districts within its jurisdiction. To date, two developments located at Montane Village off of Bow Valley Trail have been built. The developments are condominium complexes, with zoning restrictions requiring only Bow Valley Residents able to live in the units.

The mix of tenants in the building, which includes young adults, families and seniors, has been seen by some to be a poor match and causing undue conflict. The zoning restrictions have been reasonably successful at eliminating second home ownership in the development and consequently, the value of the units has not appreciated as fast as the other properties in the Town. The EHD has proven to be a useful mechanism in providing affordable housing, although there has been little enforcement of the need to reside clause to date.

The land at the base of the Silver Tip Resort development has also been zoned EHD and will be constructed in conjunction with the commercial development at Silver Tip.

Incentives through Zoning

Another technique to stimulate the construction of affordable units is to provide incentives to developers. Generally, this takes the form of a “density bonus” (more floor-space or units allowed in return for an amenity, such as affordable housing). This is most commonly used in more urban communities where land prices, and densities, are higher. Other forms of incentives take the form of density transfers or development right transfers. These have been successfully used to protect heritage buildings and agricultural land.

Requiring Housing through Agreements and Zoning

A municipality can create requirements for a developer to provide affordable housing through inclusionary zoning and linkage programs. Inclusionary zoning policies require a percentage of the overall development to be affordable. Linkage programs require the developer to provide housing for a portion of the employees generated by the development.
**Town of Canmore – Silvertip Entry-Level Housing and Payment in Lieu**

The Silvertip Golf Course has recently included entry-level housing provisions within all of their new subdivisions. Similar to the Three Sisters Master Control Bylaw, all new subdivisions in the Silvertip development area must provide 25% of the units as “entry-level” housing, which are units that meet the criteria found in the Three Sisters Bylaw DC1/98. An additional item within Silvertip allows for a cash payment in lieu of providing the entry level housing in the newer subdivisions. While this is still being ironed out, a recent amendment to the bylaw proposes that a percentage (to be negotiated for each subdivision) of the overall sale price of units may be paid in lieu of the entry-level housing subject to Council approval.

**Residential Development within Commercial Districts**

In Canmore, commercial developers are required to provide employee housing units based on the size and type of commercial development within an area zoned as Commercial Resort District (CRD). The developer has three options for providing the employee housing:

- incorporated into the development;
- constructed as a separate building within the overall site development; or
- constructed at another location subject to approval from the Town.

Other commercial districts, including the Town Centre District, Gateway Commercial District and the Bow Valley Trial Commercial District also encourage the location of employee housing within their boundaries. This was a requirement at one point, but was dropped due to concerns expressed by the business community in Canmore.

**Secondary Suites**

Recently, the Town of Canmore has encouraged the development of legal secondary suites in a number of residential neighbourhoods throughout the town. The increased supply of rental accommodation has provided a source of affordable rental accommodation for residents and temporary employees of Canmore. The development of secondary suites within homes makes them more “doubly affordable”, by not only providing rental accommodation but by also providing a revenue stream to the home owner. The zoning of secondary suites is accomplished through R1B zoning that permits the inclusion of secondary suites as part of a single family detached dwelling. This includes the following:

- R1B (Residential Single Family-Detached Plus District)
- R1BE (Residential Single Family-Detached Plus Entry Level Lot District)
- R1BW (Residential Single Family-Detached Plus Wide Lot District)

The Town has also developed a R1S zoning (Residential Single Family-Detached with Suites District) for single family-detached dwelling units on large lots with the potential for secondary suites where the appearance of the homes from the street is similar to single-family dwellings. Other important districts include R2 zoning (Residential Family Two-Unit District) which provides for duplexes and R2A (Residential Family Low Density District) which permits duplexes with the option of townhouse development.
Three Sisters Development: Master Zoning Bylaw (Direct Control Zoning Bylaw #1-98)

In 1998, the Town of Canmore and Three Sisters concluded discussions resulting in approval of a Master Zoning Bylaw for the entire 2000+ acre property. The key information relating to affordable housing includes:

- 25% of residential units are to be entry level housing
- up to 30 acres designated for community housing
- staff housing required at a rate of one unit per 6-10 hotel rooms.

The development of the Three Sisters Resort requires phased growth of no more than 200 residential units per annum. A minimum proportion of 25% of all residential units approved during any particular year must:

- Provide roughed in secondary suites at the time of construction of the primary unit
- Qualify as entry level housing units under the terms set out in the bylaw. This includes meeting the R1B district regulations of Bylaw 09-99, and also includes other criteria such as selling to locals for a set period, an average maximum lot width of 13 meters, a commitment to build one primary unit of no more than 130 square meters and a secondary suite of no more than 84 square meters, and a commitment to build within 6 months of purchase
- be defined as an entry level multi-family unit: providing a total gross floor area in the range of 28 to 93 square meters.

As a means of encouraging additional affordable housing in the Three Sisters Development, the following types of development can be built in excess of the 200 residential units per year at Three Sisters:

- Staff accommodation units
- Secondary suites provided in single family detached dwellings
- Up to an additional 50 entry level units (Canmore residents are offered first offer of sale for 45 days, the development requires both a primary and secondary suite be development within 6 months).

Silver Tip Development – Area Structure Plan

This large tract of land on the north side of the Trans-Canada Highway began its phased development prior to the Three Sisters Development. In June 2000, the Town of Canmore requested Stone Creek Properties prepare an area structure plan for Silver Tip to replace the 1990 Hyatt Regency Canmore Master Plan. With regard to affordable housing, the plan advocates:

- 850 employee housing units commensurate with development of the resort site
- the provision of employee housing as entry level or affordable dwelling units appropriate to the nature of employment generated by the resort development
- the provision of a variety of housing forms and types within the employee housing area
Municipal Land
A number of municipalities have been successful in establishing community housing lands that are to be used for perpetually affordable housing.

**Community Housing Land**
The Town of Canmore currently owns approximately 19 acres of land, with an option to purchase an additional 18. Out of this total, only about 25 acres will actually be developable. There is potential for the Town to acquire 25 acres of additional lands through further development of the Three Sisters property subject to road closures.

**Municipal Rail Land**
The City of Red Deer assisted Habitat for Humanity with provision of Municipal rail land. Nine lots in an existing subdivision were given to Habitat for Humanity and with extensive business and community participation in provision of servicing and planning; the majority of the lots have been developed in a three year period.

Assisting Non-Profits and Cooperatives
A number of municipalities have assisted private non-profit societies, such as service organizations, faith-based groups, and co-operatives. This has taken the form of providing staff assistance, facilitating discussions with potential lenders, providing direct grants and writing-down land costs.

**City of Red Deer**
The City of Red Deer Social Planning Department has assisted the community in addressing housing issues for more than a decade. The department has had a significant role in the development and support of the Red Deer Housing Committee (a group of agencies, organizations and individuals established in the early 1990’s) through financial contribution and staff support. As well, the Social Planning Department staff work with community agencies, steering committees, consortia, project teams and other groups who endeavour to collaboratively plan and implement housing solutions and related support services along the continuum of housing. Departmental support includes information, facilitation, and liaison to other City departments and other orders of government.

**Town of Canmore – Mountain Homes for Humanity**
Mountain Homes for Humanity will be applying for their Co-op project in the fall of 2003. The proposal calls for the development of a total of 43 units and a common amenity building. The 43 units will be comprised of 7 – 1 bedroom units, 14 – 2 bedroom units, 18 – 3 bedroom units and 4 – 4 bedroom units. Prices will range from $115k to $180k. Development is expected to be completed by the spring of 2004.
The Town of Canmore has been active in supporting locally based groups to pursue the construction of affordable housing. In 1996, with the help of Town staff, the Mountain Homes for Humanity Housing Co-op was formed. This group has actively explored the development of a “limited and non-equity style co-operative”. Plans are well advanced on the development of a parcel of land that had been dedicated to the Town through the Three Sisters Master Agreement.

Establishing Municipal Housing Corporations

Across Canada, many municipal housing corporations have been established to build or buy affordable housing either directly or through partnerships. Some of these corporations have been established for more than 40 years and were able to use various Federal-Provincial Government programs.

Since new funding for these programs was severely curtailed almost ten years ago, municipal housing corporations have had to be much more creative in facilitating affordable housing. Notwithstanding this, municipal housing corporations, together with senior government sponsored social housing, have been highly successful in maintaining good quality, perpetually affordable housing, most as rental properties.

The Canmore Community Housing Corporation (CCHC).

The Town of Canmore established the CCHC in 2001. The Corporation was given the necessary structure, funding and land to tackle the issue of perpetually affordable housing in Canmore. The CCHC has been given the responsibility of identifying and prioritizing housing needs in the community, working with local service organizations and businesses to improve the supply of affordable housing and to identify and secure potential lands for the future provision of perpetually affordable housing in Canmore. The CCHC’s first project is an option to lease land to the Mountain Homes for Humanity Co-operative on community lands at the Three Sisters Development, Site 2A.

Central Edmonton Community Land Trust (CECLT)

The CECLT is a non-profit corporation formed to acquire land and housing to provide affordable housing for families with limited resources. To keep units affordable, the land is held in trust in perpetuity. Units are leased to tenants on a “rent-to-own” basis. These properties are purchased by the Trust with funding under the City of Edmonton Low-Income Housing Capital Assistance Program (LIHCAP). These properties also received funding for renovations under the federal RRAP Program.

Financial Approaches

Some municipalities have established reserve funds earmarked for affordable, rental or special needs housing. Funding can be from several sources including various “linkage programs”,

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which establish a form of tax on commercial or industrial development that must go towards housing. Other sources of revenue are municipal borrowings (more common in the U.S.), charitable giving, and municipal land sales.

Other forms of direct financial assistance have taken the form of low-interest or forgivable mortgages and direct funding of specific projects built and managed by service organizations, community non-profits or faith-based societies.

**The Canmore Community Housing Fund**

This fund was created through the sale of a municipal parcel of land in South Canmore. The fund can be used as a loan from the Town of Canmore to assist the CCHC develop rental and sale units for local residents. There are no plans in the immediate future to top up the fund for additional affordable housing projects in Canmore.

**Incentives for the Preservation of Existing Rental Stock**

Renters have the most serious housing affordability issues. According to the 1996 Census, there are 48,930 renter households in the Victoria Census Metropolitan Area. One-third of these households are in core need. This means there are more than 16,000 families, single individuals and senior citizens who cannot rent appropriate accommodation for less than 30% of their income.

The cost of replacing existing rental units that are removed from the market, through either deterioration or conversion, continues to be uneconomic without a significant capital subsidy. The gap between the construction costs of a typical wood-frame apartment unit and what would be a viable investment based on current market rents is about $27,000. In many cases, it would be much more efficient to support the preservation and improvement of existing rental units rather than subsidize their replacement.

By selectively using incentives such as the waiving of property taxes for up to 10 years at a cost of $4,500 to $6,000 per unit, local governments would be able to assist in the preservation of the existing housing stock.
Chapter 11 – Deciding Where to Concentrate Your Efforts

Local communities have scarce resources to meet the range of local needs. Accordingly, the effective allocation of these resources is a key challenge facing the community overall and the municipality in particular.

Not all practices will have a similar impact on every community. For example, the practice of density bonusing to raise funds for affordable housing, while of low cost, will not be very effective in a community where there is little new commercial or industrial development.

The chart below highlights some of the practices that may be of interest to many communities and points out the general cost/benefit of each. Communities must make careful choices to ensure that greatest benefit can be achieved with locally available resources.

The practices and approaches identified are the ‘tools’ available to local municipalities; however, there may be limitations to the extent that municipality may employ these tools. In addition, the cost of some tools may be too expensive for a given community’s property tax base to finance (e.g., direct provision of financing of affordable housing). In these cases, local municipalities may want to use the advocacy approach. This approach can be used to encourage other orders of government to consider changing legislation or providing some form of capital or ongoing funding to meet the affordable housing needs of communities in Alberta.

### Municipal Cost / Benefit of Selected Practices

<table>
<thead>
<tr>
<th>PRACTICES</th>
<th>DIRECT COST</th>
<th>BENEFIT</th>
<th>Rural</th>
<th>Urban</th>
<th>Growing Urban</th>
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<td>MED</td>
<td>MED-HIGH</td>
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<td>LOW</td>
<td>HIGH</td>
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<tr>
<td>Inclusionary Zoning</td>
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<td>LOW</td>
<td>HIGH</td>
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<tr>
<td>Infill Development</td>
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<td>LOW</td>
<td>HIGH</td>
<td></td>
<td>MED</td>
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<td>Exemption of Development Charges &amp; Other Fees</td>
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<td>LOW</td>
<td>MED</td>
<td>HIGH</td>
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<tr>
<td>Tax Credits</td>
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<td>LOW</td>
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<td>HIGH</td>
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<td>Grants &amp; Loans</td>
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<td>Trust Funds</td>
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<tr>
<td>Direct Financing</td>
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<td>HIGH</td>
<td>HIGH</td>
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<tr>
<td>Public/Private Partnerships</td>
<td>X</td>
<td>HIGH</td>
<td>HIGH</td>
<td>HIGH</td>
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</table>

Figure 5
PART VI – IMPLEMENTING THE STRATEGY

“I know where I am and where I am going; I have my map. Now I need to get there.”

You’ve built a vision; you’ve performed an assessment of your current affordable housing situation; you understand the issues; you’ve developed a plan to close the gap. Now comes the time to implement the strategy.

Implementation is often a very complex process encompassing a myriad of factors. There are a number of key elements to be considered in developing successful implementation strategies, particularly if activity is extended over a period of time and the scope of the activities is extensive. These elements include:

- **Commitment**: acknowledging the problem and taking action to deal with it – some elements will come to fruition in the short term, some may take longer; over the long run, persistence and patience on the part of government, the community and stakeholders will be essential;
- **Leadership**: within the region, amongst the housing industry community, local government, the business community, and the local community;
- **Cooperation**: a willingness to work together to form partnerships, to share resources to stretch resources; to coordinate solutions;
- **Phasing**: it is not affordable or realistic to carry out everything at once, not everything is equally important, and some activities are precondition or catalysts for others;
- **Resources**: there are usually costs (both financial and human) involved and, depending on which initiatives are undertaken and by whom, there is a differential impact on the various parties involved, in some cases key public investments can act as a catalyst for advancing implementation;
- **Responsibility**: the formation of an on-going implementation administrative mechanism is important for advancing initiatives;
- **Momentum**: achieving early tangible results with significant impacts is important for maintaining commitment, as is continued progress; and,
Adjustment: refining, responding to, coordinating and facilitating specific proposals and alternatives on an ongoing basis.

In any municipality, many partners will be involved in implementing your strategy and the combination of partners will vary depending on the action, the timing of the strategic action, and resources available. Local governments and other stakeholders, working together, will need to choose a course of action and be committed to carrying it out.

However, regardless of what the actions are, and who will carry out the actions, you need to take into consideration a couple of other factors to increase the likelihood of success. These factors are discussed in this section.

Chapter 12 – NIMBY

The following information is taken from the document “NIMBY – Guidelines for Action – Managing Housing Related Dispute” from the Rural & Small Town Research and Studies Programme at Mount Allison University in New Brunswick.

WHAT IS NIMBY?

The “Not In My Back Yard” (NIMBY) syndrome is collective opposition taken against proposed change – both physical and social – to the local environment. New housing construction, renovations to existing housing, landscaping, or altered traffic patterns all constitute physical changes. Social change denotes demographic, ethnic, racial or economic changes to a neighbourhood social structure. NIMBY protest is based on the belief that change will have a negative effect on the character, socioeconomic status, or quality of life in a neighbourhood.

Everyone needs information that can help them make better decisions about issues that affect housing in their community. One of the most common complaints expressed by NIMBY citizens is that they were not informed about proposed changes to their local environment. Housing providers may lack local knowledge about the area in which they plan to build. Elected officials – on whose shoulders rest the major decisions about planning and development – may not be cognizant of information on new design concepts or innovative housing ideas. Demographic changes and the advent of partnerships between the public and private sectors require initiative on the part of planners and developers so that future needs for affordable housing will be met. Planners may be too preoccupied with procedural matters to recognize emerging demands for alternate
or more efficient forms of housing. As a result, attempts to diversify housing stock in a community may not be fairly considered, especially if the stakeholders involved in a NIMBY dispute are not well-informed. These guidelines suggest ways that planners, municipal officials, and housing providers can meet a range of housing needs without stifling citizen participation in the planning process.

Meeting Housing Needs

The Community
On a personal level, housing fills a basic human need; but it also contributes materially to the economic and social well-being of a community. In determining its housing needs, a community must strive to provide a variety of appealing and affordable housing choices for all. Usually, this is stated as a policy objective in the municipal plan. In practice, however, meeting diverse housing needs may be a top priority for many communities.

The Homeowner
Buying a home can be the most important investment decision one ever makes. Home ownership is an important indicator of social and economic status in the community. It is an expression of personal identity and reinforces self-esteem. Housing is much more than a roof over out heads; it contributes to a sense of well-being and promotes feelings of security, family and community ties, and financial and emotional stability. No wonder, then, that people react very strongly to anything that might alter their local housing environment.

Why does NIMBY occur?
Housing-related NIMBY occurs most often when development proposals conflict with the lifestyle and investment expectations of residents. These expectations are widely held and can be traced back to the “beautification” by-laws passed in most North American cities at the turn of the century. This legislation was designed to prevent the encroachment of slums into affluent neighbourhoods. After the Second World War, the homogeneous, middle-class suburb became an ideal model against which all other forms of housing were measured. Meanwhile, rising land costs in older, inner city neighbourhoods resulted in a shift from large single detached housing to multiple-unit apartment buildings. These and other kinds of large-scale development – collectively referred to as “urban renewal” – produced a backlash among residents who were disconcerted about the sudden and drastic changes occurring in their neighbourhoods. The desirability of a long-term development strategy built around the concept of growth for growth’s sake is being questioned.
These are just a few root causes of the NIMBY phenomenon. Opposition is also based on prejudice and fear. NIMBY citizens have legitimate grounds for opposing a project that may be inappropriate for the area, poorly designed, or likely to have a negative effect on their property investment. Nevertheless, much local opposition does spring from concerns and fears that may have little to do with the proposal under consideration. Since the range of objections in NIMBY disputes is typically broad, developing a greater understanding of what motivates residents to oppose a project is an essential prerequisite to successful negotiations and meaningful responses to the objections being voiced.

**Understanding NIMBY**

Research suggests that NIMBY objections can be broken down into five groups:

- **Process** Objections related to land use regulations and criticism of the public participation process.
- **Project** Objections that comment on the physical characteristics of the project.
- **Presage** Objections that are largely speculative in nature and cannot be substantiated with evidence.
- **Pretext** Objections that indicate that the issue was not exclusively related to the project itself, but to prior conditions in the community.
- **Prejudice** Objections related to the social, economic, racial or ethnic status of potential occupants of proposed project.

NIMBY cannot always be characterized as narrow-minded obstructionism. Critics of the physical appearance of a project may be echoing local planning regulations that require compatibility with surrounding architecture. Other common objections with respect to the appropriateness of the site, appropriate land use, local availability of amenities such as playgrounds, access to schools and transit services, traffic flow, and existing zoning regulations are valid questions that should be clarified before a proposal is given the green light. However, NIMBY citizens sometimes put their own fears or expectations about what might happen to their neighbourhood ahead of community requirements for alternative, innovative, social or special needs housing.

Distinguishing between the two is not a simple matter. What at first seems to be spontaneous protest targeting a specific proposal can in fact hearken back to previous NIMBY incidents, to the existence of unattractive or inappropriate housing nearby, or to other factors unconnected to the project in question, such as
personality conflicts, reputation of the developer, quality of municipal services, or single-interest lobbying. Intolerance also plays a central role in many housing-related disputes. Fear of strangers and ethnic or racial prejudice may underlie NIMBY objections, or discrimination based on social or economic status may be involved when social or special needs housing is proposed. Changing deeply ingrained societal attitudes towards other people is much more challenging than changing public attitudes towards housing. To some extent, however, the latter does affect the former. More appealing design, better quality of construction, and better integration of social housing projects into existing neighbourhoods have improved neighbourhood acceptance of such projects. Nevertheless, the stigma of social assistance, fear of outsiders, fear of crime and other factors indirectly related to residential development remain all too-common feature of NIMBY incidents.

The Duality of NIMBY

Research suggests that both positive and negative motivations can be present in a NIMBY dispute. Community responses to a housing proposal can range from wholehearted acceptance to total rejection of any proposed changes in the local environment. The need to differentiate between opposition that is in tune with municipal planning objectives and protest based purely on self-interest is the most delicate and difficult task facing planners, housing providers, and elected officials confronted by a NIMBY dispute. The chief task, therefore, of the people who must respond to NIMBY objections is to determine whether or not local opposition to a housing project is based on “bad” NIMBY” or “good” NIMBY.

The positive side of NIMBY stems from the universal desire to live in safe, stable neighbourhoods where cultural and historical values are respected. “Good" NIMBY indicates the presence of strong community identity. It also shows that people are concerned about housing issues which extend beyond the boundaries of their own property. Public input contributes local knowledge to the planning process and promotes more effective and accountable decision-making at the municipal level.

When a NIMBY response conflicts with meeting the housing needs of others, however, it exerts a negative influence on the course of community development. Too often, housing-related NIMBY objections are a cross purposes with planning objectives and social goals. “No-growth” advocates, for example, may wish to preserve the character of existing neighbourhoods, even if it means that community housing needs remain unresolved. NIMBY citizens may make demands on how a property owner develops a piece of land, even though they would strenuously resist the imposition of similar controls on themselves. When
citizen participation is manipulated by pressure group tactics, a process intended to serve the public interest serves narrow self-interest instead.

### THE NIMBY ACRONYM GAME

<table>
<thead>
<tr>
<th>Acronym</th>
<th>Definition</th>
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</thead>
<tbody>
<tr>
<td>YIMBY</td>
<td>Yes In My Back Yard</td>
</tr>
<tr>
<td>LULU</td>
<td>Locally Unacceptable Land Use</td>
</tr>
<tr>
<td>NIMTOO</td>
<td>Not In My Term Of Office</td>
</tr>
<tr>
<td>NIMBL</td>
<td>Not In My Bottom Line</td>
</tr>
<tr>
<td>BYBYTM</td>
<td>Better Your Back Yard Than Mine</td>
</tr>
<tr>
<td>NIABY</td>
<td>Not In Anybody’s Back Yard</td>
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<tr>
<td>DAD</td>
<td>Decide, Announce, Defend</td>
</tr>
<tr>
<td>YIMFY</td>
<td>Yes In My Front Yard</td>
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<tr>
<td>NOPE</td>
<td>Not On Planet Earth</td>
</tr>
<tr>
<td>CAVE</td>
<td>Citizens Against Virtually Everything</td>
</tr>
<tr>
<td>BANANA</td>
<td>Build Absolutely Nothing At or Near Anyone</td>
</tr>
</tbody>
</table>

### Responding to Housing-Related NIMBY

Developing a clear understanding of how NIMBY objections reflect these complex dualities means recognizing the value of public input. At the same time it requires allaying the natural fears of those who feel threatened by change. Housing providers need to anticipate NIMBY and respond directly when a NIMBY challenge arises. This can be accomplished in a number of ways:

- By preparing for NIMBY through increased public awareness of the changing nature of community housing needs;
- By encouraging negotiation and non-partisan discussion of NIMBY objections; and
- By convincing community leaders and housing providers that citizens want and need to be informed about housing issues.

The following guidelines build on these key fundamentals. The first step is understanding that everyone in the community is a housing stakeholder. Citizens, planners, elected officials, private developers, social agencies – all can learn from observations and insights gleaned from research on NIMBY. Above all, the NIMBY phenomenon must be viewed by all participants as an opportunity for reviewing – and if necessary revising – local
housing policies, rather than as a mechanism for obstructing change. The housing needs of minority social groups such as single parents and seniors must be included and accepted within this dialogue. At the same time, the possible effects of public participation in planning decisions – keeping the promotion of public policy accountable, giving a public sounding board to private concerns about social and physical change, and furnishing decision makers with resident perspectives on community development – need to be recognized and emphasized.

Guidelines for Preparing for NIMBY

Planners, elected officials and housing providers can all take an active role in educating the community about how to resolve development issues. Taking into account how people, individually and collectively, cope with changes in the physical and social environment is at the very heart of dealing effectively with controversial development proposals. Because housing affects the social and economic life of a community in so many ways, it is shortsighted for municipalities and the public at large to brush aside NIMBY concerns and unconditionally approve residential development proposals, as has happened many times in the past. All interested citizens, individual builders, housing advocacy groups, and responsible government agencies should be given an opportunity to scrutinize and comment on housing development proposals, since all have a stake in the growth of their community and all have unique perspectives on the implications of that growth.
**DIPLOMACY**
- Be aware that no housing proposal is immune from a NIMBY reaction, and prepare for it in advance. Do not react negatively or insensitively to hostile criticism at open houses. Be diplomatic, not overbearing. Refrain from making unflattering or derogatory public statements about NIMBY citizens.

**COMMUNITY BENEFITS**
- If you are a housing provider, ask yourself, “Can I argue with complete confidence that my project is good for the community?” Prepare a list of reasons why the project will benefit the community as a whole, rather than those who are potential occupants.

**COMMUNICATE**
- Keep the public informed of how the latest advances in innovative housing can further community housing goals. Regular press releases, appearances on community affairs television and radio programs, and public information meetings are useful tools of communication and education.

**DOCUMENT**
- Keep appeal records of NIMBY challenges on hand and make them available to developers who want to build similar projects.

**STREAMLINE**
- Streamline application procedures for innovative housing so that they do not become mired in red tape simply because they are non-standard.

**INFORMATION**
- Elected officials should keep up to date on housing proposals; develop an information base that will facilitate informed responses to NIMBY arguments.
Guidelines for Building Acceptance

Home builders and other housing providers often seem perplexed when residents react negatively to their proposal. “How could anyone in their right mind oppose such a wonderful project?” they ask themselves. Many builders conclude that NIMBY is attributable to a few “hotheads” or “fanatics” who are trying to “stir up the neighbourhood.” Since builders are understandably preoccupied with getting their project off the ground, they may not grasp the importance of public participation, or the utility of gauging community feelings and attitudes towards their proposal. When housing is seen as a community issue, however, the effort must be made to place the project within its neighbourhood context – that is, to view it from the perspective of those who must live alongside it. For example, a controversial proposal is much more likely to win the approval of local residents if they perceive benefits to the community at large rather than just to the developer or people they don’t know.
<table>
<thead>
<tr>
<th><strong>AFFORDABLE HOUSING TOOLKIT</strong></th>
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<table>
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<tr>
<th><strong>POSITIVE CONTRIBUTION</strong></th>
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<tbody>
<tr>
<td>• Recreational facilities or parkland set aside within a project might be opened up to the community. Likewise, residents of a group home might offer to perform community service to show their willingness to participate in neighbourhood activities. The objective is not to “buy off” residents but to demonstrate that new housing makes positive contributions to community and neighbourhood alike.</td>
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<table>
<thead>
<tr>
<th><strong>HOUSING NEEDS</strong></th>
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<tbody>
<tr>
<td>• Find out if a housing needs study exists for your community. Does your project address a specific housing need? If so, how have you made this known to the general public (for example, through press releases, appearances on community affairs television and radio programs, public information meetings)?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>INFORMAL CONTACT</strong></th>
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</thead>
<tbody>
<tr>
<td>• Approach nearby residents on an informal, one-on-one basis and talk to them about the proposal. It costs nothing but a little time, and it can provide early indications of how the project will be received locally.</td>
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</table>

<table>
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<tr>
<th><strong>PREVIOUS EXPERIENCE</strong></th>
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<tbody>
<tr>
<td>• Ask the local planning department about prior NIMBY incidents in the community. What were the main issues? How were they resolved? If they were not resolved, does your project run the risk of opening old wounds? Are you willing to modify your plans if opposition develops?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>POLITICAL BACKING</strong></th>
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</thead>
<tbody>
<tr>
<td>• Find out where municipal councilors stand on questions related to planning and housing development. Will the elected officials who supported your project last year vote in favour of your proposal tomorrow? If you cannot find any allies on council, maybe you need to rethink your proposal.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>DEVELOPMENT HISTORY</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>• Know the development history of the community. Are there NIMBY citizens in the neighbourhood? Do you know their names? Have you considered approaching them to discuss community housing issues?</td>
</tr>
</tbody>
</table>
Guidelines for Educating Leaders

Demographic and cultural change is creating demand for affordable alternatives to the typical single-family dwelling. Government policies with regard to social housing are attempting to adapt to these changes. Acceptance of innovative housing development cannot occur without community-based leadership that is committed to both public participation in the planning process and the promotion of housing choice as a positive value. The views of NIMBY citizens may not represent those of other groups in the community with different housing needs – the views of senior citizens, single parents, low-income families, single adults are generally under-represented in most housing-related NIMBY disputes. But that does not mean that they should not be heard. It is the responsibility of housing stakeholders – not NIMBY advocates – to be aware of the housing needs of all people in the community. They should support proposals that enhance housing affordability and increase housing choice.
OPEN HOUSE APPROACH

- Most development proposals are introduced to the public using the DAD approach: Decide, Announce, Defend. Public meetings and planning appeal board hearings often take place in a confrontational atmosphere. An open house is a more neutral and invitational forum for discussing a proposal with interested members of the public.

COMMUNITY SURVEY

- A petition is the most common method for NIMBY citizens to express their grievances. However, petitions can be misleading because they may not give everyone an equal opportunity to express an opinion. Opponents of a project who go door to door collecting signatures are most likely to approach neighbours whom they know will support their position. A community or neighbourhood based referendum or straw poll conducted by telephone can be an alternative, cost-effective way of gauging how the community as a whole feels about a particular project proposal.

PROMOTE AWARENESS

- Hold special sessions, workshops, and information meetings to promote public awareness of housing needs, issues and planning responses. They can be sponsored by municipal councilors or a committee appointed by council. Holding information sessions in conjunction with regular council meetings, or organizing televised town meetings, are other options.

REGULAR COUNCIL UPDATES

- Have the planning department update council regularly on the impact of previous development agreements and variances on the municipal plan. Ask where NIMBY citizens get their information. Does it agree with your sources? Should the merits of a proposal by dedicated solely on the basis of testimony by angry neighbours on one side and a frustrated developer on the other?

INFORM THE PUBLIC

- Most building supply dealers recognize the value of keeping their customers informed about new products, new building techniques, and innovative housing designs. Retailers sometimes hold after-hours seminars for home builders or renovators for the simple reason that a well-informed customer is a repeat customer. The Home Show is another common method of introducing new ideas and products to the general public. The same techniques for disseminating retail product information can be used to inform the general public about housing needs and issues.
Chapter 13 – “Selling” the Plan

Chapter 4 introduced you to the Public Participation Spectrum. Presumably, you have been using appropriate public participation techniques throughout the development of your Affordable Housing Strategy. If you have followed the guidelines to this point, “selling” the plan should be easy. Right? Not necessarily.

This section talks about the specific questions you need to answer (Who, Why, What, How, When and Where) to develop and execute an effective communication strategy.

Identify Your Target Audiences (Who and Why)

The first question you need to answer is, “Who needs to know about and support this plan to ensure that it is successfully implemented?” Most of the stakeholders will already have been identified during the development of the plan. However, additional groups may need to be involved now that the plan has been finalized.

Ask yourself the question, “Why do I need this group / person involved at this point?” If you cannot answer this question, then maybe you do not need to include them at this time. If you can answer this question, take it a step further and ask yourself, “How would this person / group define success?” Knowing the answers to these two questions will greatly increase the likelihood of developing a communications plan that will work.

Develop the Message (What)

Now that you have determined the Who and the Why, ask yourself, “What information / message do we need to communicate to each audience?” Different groups will need different information, and different levels of detail. The message you develop should be tailored to each target audience.

Select the Appropriate Communication Channels (How)

Once you know what message needs to be delivered to whom (and why), you need to determine the most effective means of delivering this message. The IAP2 Toolbox (Appendix A) describes the different techniques you can use to share information. Review these techniques and select ones that fit your needs. Note that you will likely use multiple delivery channels to reach certain target audiences.
Deliver the Message (When and Where)

Once you have developed all the key components of your communications plan, you need to deliver the message. At this point, all your preparation will pay off. You know the who, the why, the what and the how. Pick the when (probably NOT on Super Bowl Sunday), and the where (e.g., local recreation centre, City Hall) and make it happen.

If all goes well, you will have successfully paved the way for your new affordable housing projects to be built!

<table>
<thead>
<tr>
<th>Audience (Who)</th>
<th>Message (What)</th>
<th>Channel (How)</th>
<th>Timing (When)</th>
<th>Location (Where)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community Residents</td>
<td>Highlights of Plan</td>
<td>Brochure</td>
<td>End of September</td>
<td>To every household</td>
</tr>
<tr>
<td>Community Residents</td>
<td>Upcoming Events</td>
<td>Radio Ad / Newspaper Ad</td>
<td>Middle of October</td>
<td>Local Radio Station / Newspaper</td>
</tr>
<tr>
<td>Community Residents</td>
<td>Overview of Planning Process / Recommendations</td>
<td>Town Hall Meeting</td>
<td>October 26, 2003</td>
<td>Recreation Centre</td>
</tr>
<tr>
<td>City / Town Council</td>
<td>Affordable Housing Strategy</td>
<td>Meeting</td>
<td>September Council Meeting</td>
<td>City Hall</td>
</tr>
<tr>
<td>Community Housing Authority</td>
<td>Recommendations and implications</td>
<td>Meeting</td>
<td>Middle of October</td>
<td>Recreation Centre</td>
</tr>
<tr>
<td>Home Builders Association</td>
<td>Recommendations and implications</td>
<td>Meeting</td>
<td>Middle of October</td>
<td>Recreation Centre</td>
</tr>
<tr>
<td>Financial Institutions</td>
<td>Highlights of Plan</td>
<td>Brochure</td>
<td>End of September</td>
<td></td>
</tr>
<tr>
<td>Community Groups</td>
<td>Highlights of Plan</td>
<td>Brochure</td>
<td>End of September</td>
<td></td>
</tr>
</tbody>
</table>
Chapter 14 – Measuring Success

Effective implementation of any Affordable Housing Strategy requires the establishment of reasonable targets, measurable outcomes based on defined performance indicators, and a monitoring system with which to evaluate short and long term progress toward the Strategy’s goals.

There are two ways progress can be monitored – on the basis of directly measurable targets, and on the basis of more indirect measures.

Setting Targets

To measure progress in achieving the goal of improving housing affordability in your municipality, it is desirable for targets to be identified. Progress towards meeting the targets needs to be measured so that actions, programs and the strategy itself can be evaluated.

From the perspective of improving housing affordability, there are a limited number of areas where measurable targets can be established and then monitored. Some examples of these criteria, and sample targets, are included below (from the B.C. CRD Housing Affordability Strategy).

### Households in core need

The number of households in core need is the best and most direct measure of housing affordability that is available on a municipal basis. Data on core need is derived from the Canada Census, but only every five years. However, since progress at reducing core need in communities requires long term and sustained action, the infrequency of Census data should not be considered a major disadvantage.

- **Recommendation**: Core need housing data should be monitored every five years for compliance with either a general target (reductions in absolute numbers or percentages) or a more specific target (e.g. 5% over five years, for both renters and owners)
- **Target** – By the next Census in 2006, the number of households in core need on a percentage basis in the municipality will be less than was the case in 2001.
Secondary suites

Secondary suites make a valuable contribution to housing affordability from the perspective of tenants as well as homeowners (mortgage helpers). It is difficult to count the number of secondary suites because of their frequent illegality. However, numerical estimates by municipality, which are probably fairly precise, are available from the Census.

- **Recommendation**: The number of secondary suites and progress towards legalizing secondary suites should be monitored every five years.
- **Target** – By the next Census in 2006, the number of secondary suites has increased by 10% and secondary suites have been legalized in all municipalities.

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**Monitoring the Housing Market**

In addition to the measurable targets identified above, there are many other indicators where it is not possible to establish targets, partly because it is impossible to assign accountability for reaching targets, partly because municipalities have no control over some important factors (e.g. interest rates), and partly because in many cases it is not possible to establish meaningful targets in the first place.

However it is critical that these indicators be monitored because they are essential to monitoring the status of the housing market. To take one example, vacancy rates do not directly measure housing affordability but, in most cases, falling vacancy rates lead to rising rents and potential affordability problems for low-income renters. It is thus very important to monitor vacancy rates on an ongoing basis.

**Key Data to Track**

- New housing starts by type, price range and location
- Resale housing sales by type, price range and location
- Vacancy rates and rents
- Land and building costs
- Population and household growth by municipality
- Household formation data (type, size, age group of household maintainer)
- Household incomes
- Dwelling unit characteristics (type, tenure, location, condition, size)
- Core need data
- Social housing waiting lists
- Demolitions and conversions (where available)
- Rental housing quality
DEVELOPING A MONITORING AND REPORTING PROGRAM

The following steps are important in developing a monitoring and reporting program.

Assigning accountability for the achievement of results

It is essential that a mechanism be established to undertake monitoring activity and assess implications of the data. A preliminary estimate of resources required is 25% of a staff year and possibly the provision of support services. At the municipal level, the development of in-house capacity for data collection would also be needed.

Designing the monitoring system and selecting performance measures

Monitoring programs are usually based on the use of quantifiable performance measures and targets. A sample set of indicators and baseline data could be tracked in the following areas:

- the factors affecting the cost of building housing;
- the nature of local housing stock and supply;
- affordability based on core housing need data regionally and by municipality, and related data;
- local municipal initiatives; and,
- local financing, partnership and tenure arrangements to improve affordable housing options.

Monitoring should involve annually updating this information as new or other data becomes available, depending on data sources, to determine trends and progress. If, for example a housing fund is established the number of units developed with assistance from the fund could be monitored.

Creating a monitoring and reporting schedule

Formal reporting dates should be incorporated into the monitoring program, e.g. on a set annual date – anything more frequent will make trend spotting difficult. For efficiency purposes, however, as new data becomes available, existing information should be updated on a regular basis.

Reporting monitoring results

Annual information updates should be communicated via a report card to stakeholders and the public.

Adapting and Adjusting the Strategy Over Time

As the strategy is implemented and as time goes on, the benchmark set of conditions will change. This means that the strategy should be adjusted and adapted to reflect changing circumstances.
While it is possible to project anticipated changes with some degree of accuracy over the short term, over a longer term, certainty decreases. It is, therefore, imperative that a monitoring and review program be established not only to monitor progress, but also to ensure that as new or changed circumstances arise (such as changes in senior government programs or local government powers), that actions are taken to address them.
PART VII – FINAL THOUGHTS

Well, there you have it – “Everything you always wanted to know about Affordable Housing, but were afraid to ask.”

Hopefully, this toolkit will be helpful as you take on the challenges of dealing with affordable housing issues in your community. As was stated at the outset, this book is not intended to be a Research Paper, or an Affordable Housing Strategy. Rather it offers tips, techniques, hints and examples from a variety of sources to help you with the development and implementation of your plan.

As you review the book, please keep in mind that this is not the end, but rather the beginning. The goal is to update this document on a yearly basis (more frequently if warranted) with new examples that reflect the evolving demands that municipalities are facing. So, forward those examples, those tips and techniques from your experience, to us so that we can continue to evolve this toolkit for your benefit for years to come.
APPENDICES

Appendix A – IAP2 Public Participation Toolbox
<table>
<thead>
<tr>
<th>TECHNIQUE</th>
<th>ALWAYS THINK IT THROUGH</th>
<th>WHAT CAN GO RIGHT</th>
<th>WHAT CAN GO WRONG</th>
</tr>
</thead>
<tbody>
<tr>
<td>PRINTED PUBLIC INFORMATION MATERIALS</td>
<td></td>
<td></td>
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<tr>
<td>● Fact Sheets</td>
<td>● KISS! - Keep it Short and Simple Make it visually interesting but avoid a slick sales look</td>
<td>● Can reach large target audience Allows for technical and legal reviews</td>
<td>● Only as good as the mailing list/distribution network</td>
</tr>
<tr>
<td>● Newsletters</td>
<td>● Include a postage-paid comment form to encourage two-way communication and to expand mailing list</td>
<td>● Encourages written responses if comment form enclosed</td>
<td>● Limited capability to communicate complicated concepts</td>
</tr>
<tr>
<td>● Brochures</td>
<td>● Be sure to explain public role and how public comments have affected project decisions. Q&amp;A format works well</td>
<td>● Facilitates documentation of public involvement process</td>
<td>● No guarantee materials will be read</td>
</tr>
<tr>
<td>● Issue Papers</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>INFORMATION REPOSITORIES</td>
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<tr>
<td>Libraries, city halls, distribution centers, schools, and other public facilities make good locations for housing project-related information</td>
<td>● Make sure personnel at location know where materials are kept</td>
<td>● Relevant information is accessible to the public without incurring the costs or complications of tracking multiple copies sent to different people</td>
<td>● Information repositories are often not well used by the public</td>
</tr>
<tr>
<td></td>
<td>● Keep list of repository items Track usage through a sign-in sheet</td>
<td>● Can set up visible distribution centers for project information</td>
<td></td>
</tr>
<tr>
<td>Technique</td>
<td>Always Think It Through</td>
<td>What Can Go Right</td>
<td>What Can Go Wrong</td>
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<tr>
<td><strong>FEATURE STORIES</strong></td>
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<tr>
<td>Focused stories on general project-related issues</td>
<td>● Anticipate visuals or schedule interesting events to help sell the story  ● Recognize that reporters are always looking for an angle</td>
<td>● Can heighten the perceived importance of the project  ● More likely to be read and taken seriously by the public</td>
<td>● No control over what information is presented or how</td>
</tr>
<tr>
<td><strong>BILL STUFFER</strong></td>
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</tr>
<tr>
<td>Information flyer included with monthly utility bill</td>
<td>● Design bill stuffers to be eye-catching to encourage readership</td>
<td>● Widespread distribution within service area  ● Economical use of existing mailings</td>
<td>● Limited information can be conveyed  ● Message may get confused as from the mailing entity</td>
</tr>
<tr>
<td><strong>PRESS RELEASES</strong></td>
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</tr>
<tr>
<td>Fax or e-mail press releases or media kits  Foster a relationship of editorial board and reporters</td>
<td>● Informs the media of project milestones  ● Press release language is often used directly in articles  Opportunity for technical and legal reviews</td>
<td>● Low media response rate  ● Frequent poor placement of press release within newspapers</td>
<td></td>
</tr>
<tr>
<td><strong>NEWS CONFERENCES</strong></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Make sure all speakers are trained in media relations</td>
<td>● Opportunity to reach all media in one setting</td>
<td></td>
<td>● Limited to news-worthy events</td>
</tr>
<tr>
<td><strong>TELEVISION</strong></td>
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</tr>
<tr>
<td>Television programming to present information and elicit audience response</td>
<td>● Cable options are expanding and can be inexpensive  ● Check out expanding video options on the internet</td>
<td>● Can be used in multiple geographic areas  ● Many people will take the time to watch rather than read</td>
<td>● High expense  ● Difficult to gauge impact on audience</td>
</tr>
<tr>
<td><strong>INFORMATION CENTERS and FIELD OFFICES</strong></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Offices established with prescribed hours to distribute information and respond to inquiries</td>
<td>● Provide adequate staff to accommodate group tours  ● Use brochures and videotapes to advertise and reach broader audience  ● Consider providing internet access station  ● Select an accessible and frequented location</td>
<td>● Provides opportunity for positive media coverage at groundbreaking and other significant events  ● Excellent opportunity to educate school children  ● Places information dissemination in a positive educational setting  Information is easily accessible to the public  ● Provides an opportunity for more responsive ongoing communications focused on specific public involvement activities</td>
<td>● Relatively expensive, especially for project-specific use  ● Access is limited to those in vicinity of the center unless facility is mobile</td>
</tr>
</tbody>
</table>
### EXPERT PANELS

<table>
<thead>
<tr>
<th>Technique</th>
<th>Always Think It Through</th>
<th>What Can Go Right</th>
<th>What Can Go Wrong</th>
</tr>
</thead>
</table>
| Public meeting designed in “Meet the Press” format. Media panel interviews experts from different perspectives. | ● Provide opportunity for participation by general public following panel  
● Have a neutral moderator  
Agree on ground rules in advance  
Possibly encourage local organizations to sponsor rather than challenge | ● Encourages education of the media  
● Presents opportunity for balanced discussion of key issues  
● Provides opportunity to dispel scientific misinformation | ● Requires substantial preparation and organization  
● May enhance public concerns by increasing visibility of issues |

### BRIEFINGS

Use regular meetings of social and civic clubs and organizations to provide an opportunity to inform and educate. Normally these groups need speakers. Examples of target audiences: Rotary Club, Lions Clubs, Elks Clubs, Kiwanis, League of Women Voters. Also a good technique for elected officials.

<table>
<thead>
<tr>
<th>Technique</th>
<th>Always Think It Through</th>
<th>What Can Go Right</th>
<th>What Can Go Wrong</th>
</tr>
</thead>
</table>
| | ● KISS - Keep it Short and Simple  
● Use “show and tell” techniques  
● Bring visuals | ● Control of information/presentation  
● Opportunity to reach a wide variety of individuals who may not have been attracted to another format  
● Opportunity to expand mailing list  
● Similar presentations can be used for different groups  
● Builds community goodwill | ● Project stakeholders may not be in target audiences  
● Topic may be too technical to capture interest of audience |

### CENTRAL INFORMATION CONTACT

Identify designated contacts for the public and media.

<table>
<thead>
<tr>
<th>Technique</th>
<th>Always Think It Through</th>
<th>What Can Go Right</th>
<th>What Can Go Wrong</th>
</tr>
</thead>
</table>
| | ● If possible, list a person not a position  
● Best if contact person is local  
Anticipate how phones will be answered  
Make sure message is kept up to date | ● People don’t get “the run around” when they call  
● Controls information flow  
● Conveys image of “accessibility” | ● Designated contact must be committed to and prepared for prompt and accurate responses  
● May filter public message from technical staff and decision makers  
● May not serve to answer many of the toughest questions |

### CENTRAL INFORMATION CONTACT

Providing access to technical expertise to individuals and organizations.

<table>
<thead>
<tr>
<th>Technique</th>
<th>Always Think It Through</th>
<th>What Can Go Right</th>
<th>What Can Go Wrong</th>
</tr>
</thead>
</table>
| | ● The technical resource must be perceived as credible by the audience | ● Builds credibility and helps address public concerns about equity  
● Can be effective conflict resolution technique where facts are debated | ● Limited opportunities exist for providing technical assistance  
● Technical experts may counter project information |
<table>
<thead>
<tr>
<th>TECHNIQUE</th>
<th>ALWAYS THINK IT THROUGH</th>
<th>WHAT CAN GO RIGHT</th>
<th>WHAT CAN GO WRONG</th>
</tr>
</thead>
<tbody>
<tr>
<td>INFORMATION HOT LINE</td>
<td>Make sure contact has sufficient knowledge to answer most project-related questions</td>
<td>People don’t get “the run around” when they call</td>
<td>Designated contact must be committed to and prepared for prompt and accurate responses</td>
</tr>
<tr>
<td></td>
<td>If possible, list a person not a position</td>
<td>Controls information flow</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Best if contact person is local</td>
<td>Conveys image of “accessibility”</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Easy to provide updates on project activities</td>
<td></td>
</tr>
<tr>
<td>INTERVIEWS</td>
<td>Where feasible, interviews should be conducted in-person, particularly when considering candidates for citizens committees</td>
<td>Provides opportunity for in-depth information exchange in non-threatening forum</td>
<td>Scheduling multiple interviews can be time consuming</td>
</tr>
<tr>
<td>IN-PERSON SURVEYS</td>
<td>Make sure use of result is clear before technique is designed</td>
<td>Provides traceable data</td>
<td>Expensive</td>
</tr>
<tr>
<td>RESPONSE SHEETS</td>
<td>Use prepaid postage</td>
<td>Provides input from those who would be unlikely to attend meetings</td>
<td>Does not generate statistically valid results</td>
</tr>
<tr>
<td></td>
<td>Include a section to add name to the mailing list</td>
<td>Provides a mechanism for expanding mailing list</td>
<td>Only as good as the mailing list</td>
</tr>
<tr>
<td></td>
<td>Document results as part of public involvement record</td>
<td></td>
<td>Results can be easily skewed</td>
</tr>
<tr>
<td>MAILED SURVEYS &amp; QUESTIONNAIRES</td>
<td>Make sure you need statistically valid results before making investment</td>
<td>Provides input from individuals who would be unlikely to attend meetings</td>
<td>Response rate is generally low</td>
</tr>
<tr>
<td></td>
<td>Survey/questionnaire should be professionally developed and administered to avoid bias</td>
<td>Provides input from cross-section of public not just activists</td>
<td>For statistically valid results, can be labor intensive and expensive</td>
</tr>
<tr>
<td></td>
<td>Most suitable for general attitudinal surveys</td>
<td>Statistically tested results are more persuasive with political bodies and the general public</td>
<td>Level of detail may be limited</td>
</tr>
</tbody>
</table>

Techniques to compile input and provide feedback
<table>
<thead>
<tr>
<th>Technique</th>
<th>Always Think It Through</th>
<th>What Can Go Right</th>
<th>What Can Go Wrong</th>
</tr>
</thead>
<tbody>
<tr>
<td>Telephone Surveys/Polls</td>
<td>Make sure you need statistically valid results before making investment</td>
<td>Provides input from individuals who would be unlikely to attend meetings</td>
<td>More expensive and labor intensive than mailed surveys</td>
</tr>
<tr>
<td></td>
<td>Survey/Questionnaire should be professionally developed and administered to avoid bias</td>
<td>Provides input from cross-section of public, not just those on mailing list</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Most suitable for general attitudinal surveys</td>
<td>Higher response rate than with mail-in surveys</td>
<td></td>
</tr>
<tr>
<td>Internet Surveys/Polls</td>
<td>Be precise in how you set up site, chat rooms or discussion places can generate more input than you can look at</td>
<td>Provides input from individuals who would be unlikely to attend meetings</td>
<td>Generally not statistically valid results</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Provides input from cross-section of public, not just those on mailing list</td>
<td>Can be very labor intensive to look at all of the responses</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Higher response rate than other communication forms</td>
<td>Cannot control geographic reach of poll</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>Results can be easily skewed</td>
</tr>
<tr>
<td>Computer-Based Polling</td>
<td>Appropriate for attitudinal research</td>
<td>Provides instant analyses of results</td>
<td>High expense</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Can be used in multiple areas</td>
<td>Detail of inquiry is limited</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Novelty of technique improves rate of response</td>
<td></td>
</tr>
<tr>
<td>Community Facilitators</td>
<td>Define roles, responsibilities and limitations up front</td>
<td>Promotes community-based involvement</td>
<td>Can be difficult to control information flow</td>
</tr>
<tr>
<td></td>
<td>Select and train facilitators carefully</td>
<td>Capitalizes on existing networks</td>
<td>Can build false expectations</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Enhances project credibility</td>
<td></td>
</tr>
<tr>
<td>Focus Groups</td>
<td>Conduct at least two sessions for a given target</td>
<td>Provides opportunity to test key messages prior to implementing program</td>
<td>Relatively expensive if conducted in focus group testing facility</td>
</tr>
<tr>
<td></td>
<td>Use a skilled focus group facilitator to conduct the session</td>
<td>Works best for select target audience</td>
<td></td>
</tr>
<tr>
<td>Deliberative Polling</td>
<td>Do not expect or encourage participants to develop a shared view</td>
<td>Can tell decision-makers what the public would think if they had more time and information</td>
<td>Resource intensive</td>
</tr>
<tr>
<td></td>
<td>Hire a facilitator experienced in this technique</td>
<td>Exposure to different backgrounds, arguments, and views</td>
<td>Often held in conjunction with television companies</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>2 – 3 day meeting</td>
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</tbody>
</table>
## Techniques to bring people together

<table>
<thead>
<tr>
<th>Technique</th>
<th>Always Think It Through</th>
<th>What Can Go Right</th>
<th>What Can Go Wrong</th>
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</thead>
<tbody>
<tr>
<td><strong>Simulation Games</strong></td>
<td>● Test “game” before using&lt;br&gt;● Be clear about how results will be used</td>
<td>● Can be designed to be an effective educational/training technique, especially for local officials</td>
<td>● Requires substantial preparation and time for implementation&lt;br&gt;Can be expensive</td>
</tr>
<tr>
<td><strong>Tours</strong></td>
<td>● Know how many participants can be accommodated and make plans for overflow&lt;br&gt;● Plan question/answer session Consider providing refreshments Demonstrations work better than presentations</td>
<td>● Opportunity to develop rapport with key stakeholders&lt;br&gt;● Reduces outrage by making choices more familiar</td>
<td>● Number of participants is limited by logistics&lt;br&gt;Potentiallly attractive to protestors</td>
</tr>
<tr>
<td><strong>Open Houses</strong></td>
<td>● Someone should explain format at the door&lt;br&gt;● Have each participant fill out a comment sheet to document their participation&lt;br&gt;● Be prepared for a crowd all at once - develop a meeting contingency plan&lt;br&gt;● Encourage people to draw on maps to actively participate&lt;br&gt;● Set up stations so that several people (6-10) can view at once</td>
<td>● Foster small group or one-on-one communications&lt;br&gt;● Ability to draw on other team members to answer difficult questions&lt;br&gt;● Less likely to receive media coverage&lt;br&gt;● Builds credibility</td>
<td>● Difficult to document public input&lt;br&gt;● Agitators may stage themselves at each display&lt;br&gt;● Usually more staff intensive than a meeting</td>
</tr>
<tr>
<td><strong>Community Fairs</strong></td>
<td>● All issues, large and small must be considered&lt;br&gt;● Make sure adequate resources and staff are available</td>
<td>● Focuses public attention on one element&lt;br&gt;● Conductive to media coverage&lt;br&gt;● Allows for different levels of information sharing</td>
<td>● Public must be motivated to attend&lt;br&gt;● Usually expensive to do it well&lt;br&gt;● Can damage image if not done well</td>
</tr>
<tr>
<td><strong>Coffee Klatches</strong></td>
<td>● Make sure staff is very polite and appreciative</td>
<td>● Relaxed setting is conducive to effective dialogue&lt;br&gt;● Maximizes two-way communication</td>
<td>● Can be costly and labor intensive</td>
</tr>
<tr>
<td>TECHNIQUE</td>
<td>ALWAYS THINK IT THROUGH</td>
<td>WHAT CAN GO RIGHT</td>
<td>WHAT CAN GO WRONG</td>
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<tr>
<td><strong>MEETINGS WITH EXISTING GROUPS</strong></td>
<td>● Understand who the likely audience is to be</td>
<td>● Opportunity to get on the agenda</td>
<td>● May be too selective and can leave out important groups</td>
</tr>
<tr>
<td>Small meetings with existing groups or in conjunction with another event</td>
<td>● Make opportunities for one-on-one meetings</td>
<td>● Provides opportunity for in-depth information exchange in non-threatening forum</td>
<td></td>
</tr>
<tr>
<td><strong>COMPUTER-FACILITATED WORKSHOP</strong></td>
<td>● Understand your audience, particularly the demographic categories</td>
<td>● Immediate graphic results prompt focused discussion</td>
<td>● Software limits design</td>
</tr>
<tr>
<td>Any sized meeting when participants use interactive computer technology to register opinions</td>
<td>● Design the inquiries to provide useful results</td>
<td>● Areas of agreement/disagreement easily portrayed</td>
<td>● Potential for placing too much emphasis on numbers</td>
</tr>
<tr>
<td></td>
<td>● Use facilitator trained in the technique</td>
<td>● Minority views are honored</td>
<td>● Technology failure</td>
</tr>
<tr>
<td><strong>PUBLIC HEARINGS</strong></td>
<td>● Avoid if possible</td>
<td>● Provides opportunity for public to speak without rebuttal</td>
<td>● Does not foster constructive dialogue</td>
</tr>
<tr>
<td>Formal meetings with scheduled presentations offered</td>
<td></td>
<td>● Can perpetuate an us vs. them feeling</td>
<td></td>
</tr>
<tr>
<td><strong>DESIGN CHARRETTES</strong></td>
<td>● Best used to foster creative ideas</td>
<td>● Promotes joint problem solving and creative thinking</td>
<td>● Participants may not be seen as representative by larger public</td>
</tr>
<tr>
<td>Intensive session where participants re-design project features</td>
<td>● Be clear about how results will be used</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>CONSSENSUS BUILDING TECHNIQUES</strong></td>
<td>● Use simplified methodology</td>
<td>● Encourages compromise among different interests</td>
<td>● Not appropriate for groups with no interest in compromise</td>
</tr>
<tr>
<td>Techniques for building consensus on project decisions such as criteria and alternative selection. Often used with advisory committees. Techniques include Delphi, nominal group technique, public value assessment and many others.</td>
<td>● Allow adequate time to reach consensus</td>
<td>● Provides structured and trackable decision making</td>
<td>● Clever parties can skew results</td>
</tr>
<tr>
<td></td>
<td>● Consider one of the computerized systems that are available</td>
<td></td>
<td>● Does not produce a statistically valid solution</td>
</tr>
<tr>
<td></td>
<td>● Define levels of consensus, i.e. a group does not have to agree entirely upon a decision but rather agree enough so the discussion can move forward</td>
<td></td>
<td>● Consensus may not be reached</td>
</tr>
<tr>
<td>Technique</td>
<td>Always Think It Through</td>
<td>What Can Go Right</td>
<td>What Can Go Wrong</td>
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</tr>
<tr>
<td><strong>Advisory Committees</strong></td>
<td>Define roles and responsibilities up front</td>
<td>Provides for detailed analyses for project issues</td>
<td>General public may not embrace committee’s recommendations</td>
</tr>
<tr>
<td>A group of representative stakeholders assembled to provide public input to the planning process</td>
<td>Be forthcoming with information</td>
<td>Participants gain understanding of other perspectives, leading toward compromise</td>
<td>Members may not achieve consensus</td>
</tr>
<tr>
<td></td>
<td>Use a consistently credible process</td>
<td></td>
<td>Sponsor must accept need for give-and-take</td>
</tr>
<tr>
<td></td>
<td>Interview potential committee members in person before selection</td>
<td></td>
<td>Time and labor intensive</td>
</tr>
<tr>
<td></td>
<td>Use third party facilitation</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Task Forces</strong></td>
<td>Obtain strong leadership in advance</td>
<td>Findings of a task force of independent or diverse interests will have greater credibility</td>
<td>Task force may not come to consensus or results may be too general to be meaningful</td>
</tr>
<tr>
<td>A group of experts or representative stakeholders formed to develop a specific product or policy recommendation</td>
<td>Make sure membership has credibility with the public</td>
<td>Provides constructive opportunity for compromise</td>
<td>Time and labor intensive</td>
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</tr>
<tr>
<td><strong>Panels</strong></td>
<td>Most appropriate to show different news to public</td>
<td>Provides opportunity to dispel misinformation</td>
<td>May create unwanted media attention</td>
</tr>
<tr>
<td>A group assembled to debate or provide input on specific issues</td>
<td>Panelists must be credible with public</td>
<td>Can build credibility if all sides are represented</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>May create wanted media attention</td>
<td></td>
</tr>
<tr>
<td><strong>Citizen Juries</strong></td>
<td>Requires skilled moderator</td>
<td>Great opportunity to develop deep understanding of an issue</td>
<td>Resource intensive</td>
</tr>
<tr>
<td>Small group of ordinary citizens empanelled to learn about an issue, cross examine witnesses, make a recommendation. Always non-binding with no legal standing</td>
<td>Commissioning body must follow recommendations or explain why</td>
<td>Public can identify with the “ordinary” citizens</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Be clear about how results will be used</td>
<td>Pinpoint fatal flaws or gauge public reaction</td>
<td></td>
</tr>
<tr>
<td><strong>Role-Playing</strong></td>
<td>Choose roles carefully. Ensure that all interests are represented.</td>
<td>Allow people to take risk-free positions and view situation from other perspectives</td>
<td>People may not be able to actually achieve goal of seeing another’s perspective</td>
</tr>
<tr>
<td>Participants act out characters in pre-defined situation followed by evaluation of the interaction</td>
<td>People may need encouragement to play a role fully</td>
<td>Participants gain clearer understanding of issues</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Set room up with center table surrounded by concentric circles</td>
<td>Can be used with 10 to 500 people</td>
<td>Dialogue can stall or become monopolized</td>
</tr>
<tr>
<td></td>
<td>Need microphones</td>
<td>Works best with controversial issues</td>
<td></td>
</tr>
<tr>
<td><strong>Samoa Circle</strong></td>
<td>Set room up with center table surrounded by concentric circles</td>
<td>Can be used with 10 to 500 people</td>
<td>Dialogue can stall or become monopolized</td>
</tr>
<tr>
<td>Leaderless meeting that stimulates active participation</td>
<td>Need microphones</td>
<td>Works best with controversial issues</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Requires several people to record discussion</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TECHNIQUE</td>
<td>ALWAYS THINK IT THROUGH</td>
<td>WHAT CAN GO RIGHT</td>
<td>WHAT CAN GO WRONG</td>
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</tr>
<tr>
<td><strong>OPEN SPACE TECHNOLOGY</strong></td>
<td>- Important to have a powerful theme or vision statement to generate topics</td>
<td>- Provides structure for giving people opportunity and responsibility to create valuable product or experience</td>
<td>- Most important issues could get lost in the shuffle</td>
</tr>
<tr>
<td></td>
<td>- Need flexible facilities to accommodate numerous groups of different sizes</td>
<td>- Includes immediate summary of discussion</td>
<td>- Can be difficult to get accurate reporting of results</td>
</tr>
<tr>
<td></td>
<td>- Ground rules and procedures must be carefully explained for success</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>WORKSHOPS</strong></td>
<td>- Know how you plan to use public input before the workshop</td>
<td>- Excellent for discussions on criteria or analysis of alternatives</td>
<td>- Hostile participants may resist what they perceive to be the “divide and conquer” strategy of breaking into small groups</td>
</tr>
<tr>
<td></td>
<td>- Conduct training in advance with small group facilitators. Each should receive a list of instructions, especially where procedures involve weighting/ranking of factors or criteria</td>
<td>- Fosters small group or one-to-one communication</td>
<td>- Several small-group facilitators are necessary</td>
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<tr>
<td></td>
<td></td>
<td>- Ability to draw on other team members to answer difficult questions</td>
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<td></td>
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<td>- Builds credibility</td>
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<td></td>
<td>- Maximizes feedback obtained from participants</td>
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<td></td>
<td></td>
<td>- Fosters public ownership in solving the problem</td>
<td></td>
</tr>
<tr>
<td><strong>FUTURE SEARCH CONFERENCE</strong></td>
<td>- Hire a facilitator experienced in this technique</td>
<td>- Can involve hundreds of people simultaneously in major organizational change decisions</td>
<td>- Logistically challenging</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Individuals are experts</td>
<td>- May be difficult to gain complete commitment from all stakeholders</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Can lead to substantial changes across entire organization</td>
<td>- 2 — 3 day meeting</td>
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Appendix B – Sample Checklists
AFFORDABLE HOUSING TOOLKIT

Critical Success Factors

The following list describes the elements required to develop an effective community affordable housing strategy.

Critical Success Factors

- Clear Definition of “Affordable Housing” Created
- Community Goals and Objectives Established
- Data Requirements Defined
- Community Partners Involved
- Municipal Council On Board
- Municipal Departments Bought In
- Different Approaches Understood by Participants
- Affordable Housing Practices Suitable to Your Community
- More Than One Approach Incorporated
- Measures Well Integrated into Plan
- Solutions are Long-term and Self-Sustaining
- Plan is Consistent with Definition
- Immediate Action Plans are Identified and Initiated
- Appropriate Resources are Committed to the Plan
- Communications Plan Developed
- Success of Plan is Evaluated Against Established Measures
The following list describes the elements required to develop an effective community affordable housing strategy.

**Planning Steps**

- Project Manager Selected
- Project Team Selected
- Reference Committee Established
- Terms of Reference Developed
- Visioning Session Conducted
- Fact Finding Completed
- Public Information Sharing Session Completed
- Issues “Crystallized”
- Community Partners Identified and Communication Strategies Finalized
- Subcommittees established to Develop Action Plans
- Action Plans Developed
- Action Plans Incorporated into Affordable Housing Strategy
- Roles, Responsibilities, Resources and Timelines Identified
- Public Forum Held
- Affordable Housing Strategy Finalized
- Communications Strategy Finalized
- Monitoring Process Established
Appendix C – Glossary of Terms

Accessory Dwelling Unit /Secondary Suite can be rented as affordable units for low to moderate income individuals or families. They can be contained within a principal residential building or in an accessory building. In some municipalities, a covenant is attached to the deed (or title), ensuring that the unit is rented to a local resident or employee.

A.C.T. – The Affordability and Choice Today Program is sponsored by CMHC and managed by the Federation of Canadian Municipalities, the Canadian Home Builders Association and the Canadian Housing and Renewal Association. The program is designed to eliminate bylaw barriers to new approaches in planning, design, construction or servicing. Municipalities, homebuilders and developers (private, non-profit and co-operative) are eligible for grants to undertake demonstration projects, to investigate streamlined approval process projects or to document existing initiatives.

Adaptable Housing is housing designed with built-in flexibility to integrate special needs groups and an aging population e.g. ground floor accessibility, wider doorways, wheelchair ramps, adjustable counters and cabinets.

Alternate Development Standards: A way to reduce servicing costs, examples include: smaller lots, narrower roads, reduced sidewalk requirements, storm water systems that rely more on surface drainage, and the use of common utility connections.

Affordable Housing – pertains to those households in “core housing need” as developed by Canada Mortgage and Housing Corporation. Households are in core housing need if they cannot find somewhere to live that is in reasonably good condition and is big enough for their household without spending more than 30% of their household income.

Capacity – Capacity is the ability of individuals, organizations and communities to perform functions, solve problems, and set and achieve goals effectively and efficiently. Capacity development involves the sustainable creation, utilization and retention of that capacity. It involves a consideration of all factors that impact on the ability to develop, manage, and implement policies, programs, and projects. These factors include: human, physical, and financial resources and the external environment or overall context within which individuals, organizations and communities operate and interact.
**CHBA** - Canadian Home Builders’ Association.

**CMHC** - Canada Mortgage and Housing Corporation.

**Co-Housing** – This form of housing depends on traditional subsidy-free financing and attracts mostly middle class households. Units in a co-housing project are owned, often through a strata-title arrangement. In addition to the residential units there is also a common building that includes a large dining room, kitchen, lounges, meeting rooms, recreational facilities, library, workshops, and child care facilities. Cardiff Place in Victoria is the first co-housing project in Canada. (www.cohousing.org.)

**Community Housing** is a program that provides accommodation, generally for families on a rent-geared-to-income basis. The rent charged is based on 30% of adjusted family income. The shortfall of economic costs less the tenant rent is subsidized by governments. The housing projects are usually owned by the Federal/Provincial governments, the Provincial government or Municipal government.

**Condominium** – A multiple family residential strata title development consisting of individual dwelling units.

**Core Need Income Thresholds** (CNIT) are measure used by the Province to distinguish households requiring social housing assistance. Households with annual incomes equal to or less that CNIT are said to have insufficient income to afford the on-going cost of suitable and adequate and rental unit in their area. CNITs are established based on 30 percent of the median market rent.

**Covenants** are legal documents registered on title of a property that can be used to ensure that a house or property will remain affordable over the long-term. Most covenants cover one or both of the following: restricting resale prices/rental rates to a fixed rate (usually linked to the Consumer Price Index or other similar benchmark); or, restricting the use of the units to a particular group (residents).

**Co-ownership Housing** enables housing to be offered to home buyers at reasonable prices. The property is owned jointly between a homeowner and a housing authority. The land remains in the ownership of the municipality. The homeowner has equity in the value of the building. The units are deed (or title) restricted with covenants. To retain the units as affordable, resale restrictions are placed on the property. The resale value is typically set with the Consumer Price Index (CPI).
**Deed** - Generally, the word “deed” is an American term for what we call the “title” of a piece of property.

**Deed (or Title) Restrictions** are used to ensure that units are inhabited by local residents and employees. They can also be used to ensure that the residential unit will remain affordable over the long-term. Municipalities can place a covenant on a deed (or title) that will limit the resale price of the unit for an extended period of time.

**Deferred taxes** can act as an incentive to construct affordable housing. In the United States municipalities have the authority to defer property tax payments. Often, tax deferrals are extended until a profit has been made by the developer. This helps to reduce the initial cost of the project for the developer.

**Density bonuses** permit developers to build at higher densities than designated by the existing zoning provided there is an affordable housing component. This provides incentive to construct affordable housing, as the cost of constructing affordable housing is lumped in with the market development

**Density Bonusing** – A zoning tool used by municipalities to increase density (e.g. small lot, multi-family, seniors, clustering, and zero lot lines) within a zone in exchange for amenities such as the protection of environmentally sensitive areas, construction of day-care facilities, and the provision of affordable housing.

**Density transfers** allow for the sale and transfer of unused development rights of one building or parcel of land to another. Often, municipalities will sell or donate the development rights on municipally owned land to a developer assuming a proportion of the units constructed are affordable.

**Employee housing units** are used exclusively for the residence of employees and their families. These units are not rented to seasonal staff.

**Equity Coops** – Equity coops provide a form of limited equity homeownership as an alternative form of tenure for families and seniors. The coops operate on a non-profit basis so housing costs are affordable. Purchasers get ownership of unit and security of tenure. Members manage the project and control who can join. The sponsor non-profit company retains ownership of the building exterior and all common property, including the recreation, meeting and parking facilities.

**Flexible Housing** – Housing designs that offer a range of incremental adaptation to either the interior and/or exterior.
**Ground-Oriented Housing** – A relatively broad housing category; includes any structure type where the entry to dwelling unit is from the outside rather than from an interior corridor. Examples of housing types in this category include single-detached houses; duplexes, triplexes and other small, attached projects; small and large row house projects; stacked row houses; and higher-density projects with some form of ground-oriented row house component.

**Housing Adequacy** refers to the physical safety of the individual dwelling. The Public Health Act, Regulation 241/85 provides a series of conditions in which housing is considered to be inadequate. Housing is inadequate if it requires major repairs and/or is lacking the necessary services and basic facilities. Major repairs refer to plumbing, electrical, ventilation systems, disposal systems, and the structural components of a house that would warrant it being unsafe. Basic facilities refer to potable hot and cold running water, and full bathroom facilities including and indoor toilet and bathtub or shower. Additionally, housing is not adequate if it is infested with vermin.

**Housing Affordability** relates to the ability of individual households to meet their monthly rent or mortgage payments within a reasonable threshold of their income. CMHC has determined that housing is affordable if it cost not more that 30% of a household’s gross monthly income for rent or mortgage payments. CMHC also uses 32% if utilities and taxes are included. Assessing the level of housing affordability is based on a comparison of median house prices and average market rents to local income levels.

**Housing Reserve Fund or Trust Fund** – Municipalities establish special funds (from general revenues, provincial grant monies, community bonds, pension funds) to buy sites for lease or to make up the shortfall between market value and the amount paid by groups who lease land from the municipality at below market price.

**Housing Suitability** refers to the size of the home in bedrooms compared to the size of the family living in that home. Regulation 244/94, section 8, subsection 3 of the Alberta Housing Act states that accommodation is not suitable if:

a) more than 2 persons must share a bedroom and there is at least 1 individual in each of the other bedrooms,

b) an individual, 18 years of age or older, must share a bedroom with another member of the household, unless that individual is married or in a common-law relationship with that member, or
c) an individual, 5 years of age or older, must share a bedroom with an individual of the opposite sex.

Housing suitability is most likely to be an issue for large low-and moderate-income families since these families may not be able to afford the rents or mortgages on larger homes (homes that have enough bedrooms).

**Inclusionary zoning** is a technique applied to new housing developments, in which a certain portion of the units being constructed are set aside to be affordable for low and moderate-income homebuyers. Municipalities can enforce that a certain percentage of new residential development is affordable over the long term.

**Inclusionary Zoning** – Refers to policies requiring that a proportion of housing units within a new development meet affordability or other special needs criteria. It has been used to help ensure a mix of housing types in an area.

**Infill Development** occurs on parcels that have been bypassed by previous development. Infill development can provide a solution to provide new housing in already built-up areas. Lot sizes are often smaller, and the infrastructure is already in place, thereby allowing for a more affordable housing price.

**Infill Housing** – The introduction of new housing into, or adjacent to, existing neighbourhoods resulting in an intensification of land use. Such a project can include a single-family dwelling, residential conversion, attached or multiple unit form of housing and can occur in a variety of locations, including small vacant lots, transitional areas between land uses, lands previously zoned for alternate uses (e.g. commercial or industrial), underdeveloped sites, and irregular sites.

**Land Lease** – Municipalities lease land owned by them usually for non-profit co-operative or government-assisted rental housing. Generally they lease the land at 75% of its market value for 60 years. Maximum rent increases or limited resale prices are sometimes imposed.

**Land Trust** – A land trust can acquire land through purchase or donation and holds it in perpetuity in order to remove it from the speculative market and to preserve its use for specific purposes in the future, such as housing affordability.

**Life Lease** – Residents purchase an interest in the project through a leasehold interest or a contract with the sponsoring organization, and “share” in any appreciated value of the building and property. Rights to leasehold interest are purchased
with a lump sum prepayment, and residents contribute their monthly share of maintenance and operating costs through a monthly occupancy fee.

**Linkage Program /Leverage Fee**

**Commercial** – Large commercial developments, often in excess of 4000 square feet in floor space, can be required to provide an affordable housing component as a stipulation of approval. Housing can be provided on the commercial site (if appropriate); off-site, there could be a donation of land, or a cash-in-lieu payment, with the latter being the most undesirable of the options. These units normally become deed (or title) restricted.

**Residential** – A residential linkage program would often be a fee payment to the municipality, which would contribute to an affordable housing fund. Larger homes may be required to provide an ancillary dwelling unit or a secondary suite.

**Manufactured Home** – A single family dwelling manufactured as a unit, or in modules, intended to be occupied in a place other than that of its manufacture, and designed so that it may be drawn or moved from place to place.

**Mixed Use** – A combination of retail/commercial, institutional and housing units of various types on one parcel or in one project. An example is apartments for rent or condominium tenure, located above commercial or retail uses, typically maintaining separate street access.

**Multi-Family Housing** – Includes patio homes, apartments, townhouses, cluster developments and duplexes.

**Non-Cost Initiatives** are defined as methods by which the community can secure resident housing without contribution to the capital funds required for housing. Whistler, B. C. has recently launched a study into non-cost initiatives.

**Ordinance** is a term often used in the United States which refers to a statutory or legislative enactment passed by government, especially a local government. A municipality can pass an ordinance requiring that a certain percentage of new residential development be affordable. In the Canadian context, an ordinance is similar to a municipal by-law.

**Payment-in-lieu** is an option that many municipalities provide developers who do not wish to build the required affordable housing. Many municipalities have found that payment-in-lieu programs don’t provide for affordable housing. Often the fees are too low, or are set at outdated levels.
Planned Unit Developments (PUD, US term) give developers an increased level of flexibility in the overall design of residential projects in exchange for a higher quality of development. PUD ordinances often allow developers greater latitude in locating buildings on the development site, mixing various housing types and densities (single and multi-family), and land uses (including some neighbourhood commercial uses), and in some cases grant density over those normally allowed in the zoning ordinance.

Rent Geared to Income (RGI) – This is considered to be the share of a lower income household’s budget that could be spent on shelter without impacting on other necessities.

Resident Occupied Housing refers to rental units being occupied by local residents.

Resident Restricted Housing refers to housing that has a covenant attached to the deed (or title), ensuring the house will remain affordable over the long-term. When a developer is required to construct affordable housing as part of a housing or commercial development, a covenant is often placed on the affordable housing units. The covenant restricts the re-sale price of the units, thereby ensuring that affordable housing will be available over the long-term.

SCPI – Supporting Communities Partnership Initiatives; a federal program and part of the National Homelessness Initiative, that provides funding to projects addressing the needs of the homeless and those at risk of homelessness.

Secondary Suites – A self-contained unit in a building (typically a single family home). These rental units are also called basement apartments, apartments in houses, accessory apartments, in-law suites and “illegal” suites.

Second Home /Vacation Homes are those homes owned by people that do not reside permanently in the community.

Shell housing – Housing built as a complete shell with the interior left unfinished. The owner can reside in the enclosed space or basement while completing the remaining structure.

Small Lot Zoning – A zoning tool designed to use land more effectively and efficiently by decreasing the average lot size, or creating a maximum lot size; and reducing setbacks.

Social Housing – Generally housing that is subsidized by government.
Special Needs – Persons with special needs include persons with chronic mental illness, physical disabilities, alcohol and/or drug dependency, brain injuries, HIV/AIDS, mental illness, children-in-care, inner-city youth, women fleeing violence, disorderly offenders, young offenders and individuals who are homeless or at risk of homelessness, the frail elderly. Special Needs Housing includes short-term emergency shelters for the homeless, transition houses, group homes, single room occupancy, second stage and permanent self-contained accommodation.

Special Needs Housing is usually provided in the form of a Group Home, and is for persons with special needs such as physical or mental disabilities. The group home residents are generally provided with support services that assist them with daily living needs. Projects are typically owned by community non-profit groups and subsidies are provided by the Federal and Provincial governments.

Staff Housing, not to be confused with employee housing, is seasonal or temporary accommodation for staff.

Streamlined Municipal Approval Process – The removal of obstacles that slow the development approval process. Usually involves a review of such regulatory tools as zoning, development permits, and public processes.

Supportive Housing – A form of housing that combines building features and personal services to enable people to remain living in the community as long as they are able and choose to do so. Support services, include, at a minimum: a private space with a lockable door, a safe and barrier-free environment, monitoring and emergency response, at least one meal a day available, housekeeping, laundry and recreational opportunities.

UDI – Urban Development Institute.
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