



Roadmap Report

A LOOK AT WHERE WE ARE
AT PRESENT AND WHERE WE
ARE HEADED

SUMMER 2021

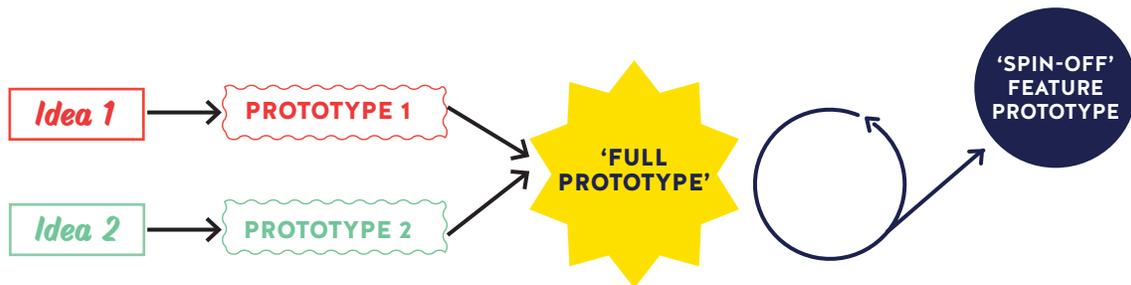


INTRODUCTION

The *Future of Home: Inclusive Housing Solutions Lab* draws on the principles of human-centred design and social innovation to generate new and creative housing and support models that are accessible, affordable, and enable the social inclusion of people with developmental disabilities.

Through its work, Lab participants generated a number of prototypes to address different challenge areas, ultimately collaborating on a single prototype model that would lead to more inclusive apartment-style living for people with disabilities. This exciting new prototype - and a smaller spin-off prototype riffing on one of the features –is described in more detail below.

The *Future of Home Lab* is a collaboration between Skills Society, Inclusion Alberta, Civida (formerly Capital Region Housing) and Homeward Trust. Lab participants included people with developmental disabilities, their families and allies, service providers, funders, architects, advocates, and housing developers.



This roadmap report describes the final prototypes that were generated and outlines key learnings that have emerged so far in moving towards a pilot with a hope of adoption and scaling.



INCLUSIVE APARTMENT LIVING

WHAT COULD A NEW MODEL FOR INCLUSIVE LIVING LOOK LIKE?

Imagine a six-storey, mixed-use apartment building located in a desirable, central neighborhood that is close to amenities and accessible by transit. Drawing on an Intentional Community model, there is a clause included in the rental agreement that outlines the inclusive philosophy of the building. The building has 96 units; 10% of these units are offered below market value in order to be affordable to someone living on AISH. Shared common areas in the building and vibrant retail spaces on the main floor create 'bumping grounds' for community connections to begin to form. A Community Concierge, a full-time paid position, regularly initiates community-building activities in the building. In partnership with a local disability service provider, people with disabilities receive PDD-funded support services in their own apartments on demand. Interested neighbors in the building are also contracted by the service provider to provide overnight support as needed.

THE PROBLEMS WE ARE TRYING TO SOLVE:

There is currently a lack of housing that meets the needs of people with developmental disabilities—that is accessible, affordable, and fosters inclusion. In many apartment buildings rents are out of reach, suites are inaccessible, and there are few opportunities for residents to connect. This can make residents feel unsafe, lonely, and left with a sense that their house is not a home.

KEY FEATURES OF THE PROTOTYPE

During the Lab, participants quickly learned that they were not just prototyping a physical space and support model but rather a 'way of living' that encapsulated values such as interdependence, community and care. This way of life involves people sharing their life with one another – regardless of their differences. Importantly, teams recognized this 'neighbourly' way of life requires nurturing - intentional efforts on the part of key paid supports, like the community concierge, to build and sustain a vibrant community culture.

This 'way of living' might look like people:

- ▶ Spontaneously checking in with one another
- ▶ Offering food and conversation when someone is going through a difficult time

- ▶ Celebrating wins together
- ▶ Sharing a job opportunity they heard about with a neighbor seeking employment
- ➔ Ultimately, it looks like neighbours having meaningful interactions with one another.

Lab participants explored ways that both the physical and social spaces might be part of nurturing community. The features outlined below reflect different ‘hunches’ as to what might help nurture this desired ‘neighbourly’ way of life:

Barrier Free Design throughout the building creates seamless access to indoor and outdoor amenity spaces and within individual suites for people with disabilities.

Low ratio of affordable units and disbursement of affordable units throughout the building supports inclusion.

On demand support services through partnership with a local service provider enable residents with disabilities to access supports when they need them.

A community night watch initiative contracts neighbors in the building to provide more natural feeling support as needed to residents with disabilities overnight.

Shared community spaces create opportunities for neighbours to gather and engage in activities together.

Retail and commercial spaces offer ‘bumping grounds’ to spark social connection and draw the outside community in.

A community concierge helps animate the building with the help of volunteer neighbours. Together, they match-make neighbours with similar passions or interests, coordinate community activities, and keep a pulse on what’s happening in the neighbourhood surrounding the building.

A shared social contract ensures neighbours understand and remain committed to this way of life and outlines opportunities for sharing gifts and talents with the community.

A community inspired and organized to participate in activities like:

- ▶ A social committee facilitating care packages for those facing challenges
- ▶ A pride-of-ownership committee spearheading a community art project for the lobby and inviting neighbors to help plant flower beds that improve the curb appeal of the building.

WHO BENEFITS & HOW - ANTICIPATED IMPACTS

RESIDENTS WITH DISABILITIES

- ▶ Gain access to a high end apartment in a desirable location near amenities at a monthly rate that fits their budget
- ▶ Receive PDD funded supports when they need it (rather than having it be scheduled in) in the comfort of their own home
- ▶ Build connections and meaningful relationships with others through the built in community building activities

RESIDENTS WITHOUT DISABILITIES

- ▶ Gain the opportunity to 'live their values' in an inclusive community
- ▶ Build connections and meaningful relationships with others through the built in community building activities
- ▶ Learn about the experience of disability and ways they can support people's inclusion

DEVELOPER/PROPERTY MANAGER

- ▶ Able to offer enhanced property management services that far exceed building maintenance, and incorporate community building for all residents
- ▶ Reduced turnover costs and peace of mind knowing they have support finding tenants for a subset of units
- ▶ For profit developers/property managers gain access to federal grant dollars and tax incentive programs when working with a non-profit to offer affordable housing

DISABILITY SERVICE PROVIDER

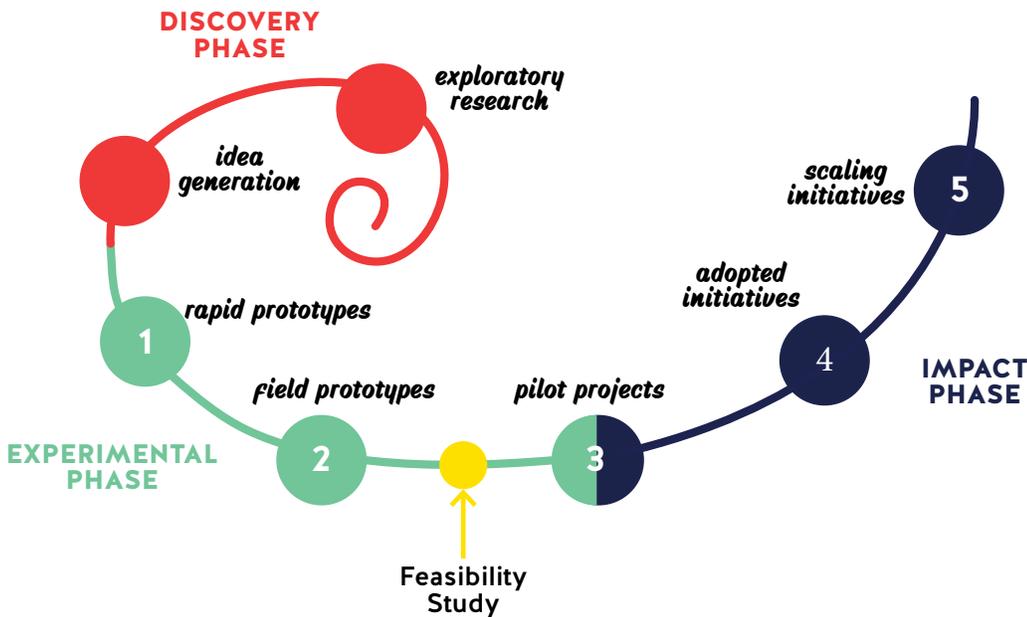
- ▶ Strong relationship with landlord enables them to better support the people with disabilities they serve
- ▶ Contribute to disability and housing sector system change, incorporating learning into practices and sharing with others
- ▶ Community Disability Support Workers able to tap into the community building activities in the building to support the inclusion of the people with disabilities they serve

WHERE WE ARE IN THE INNOVATION CYCLE

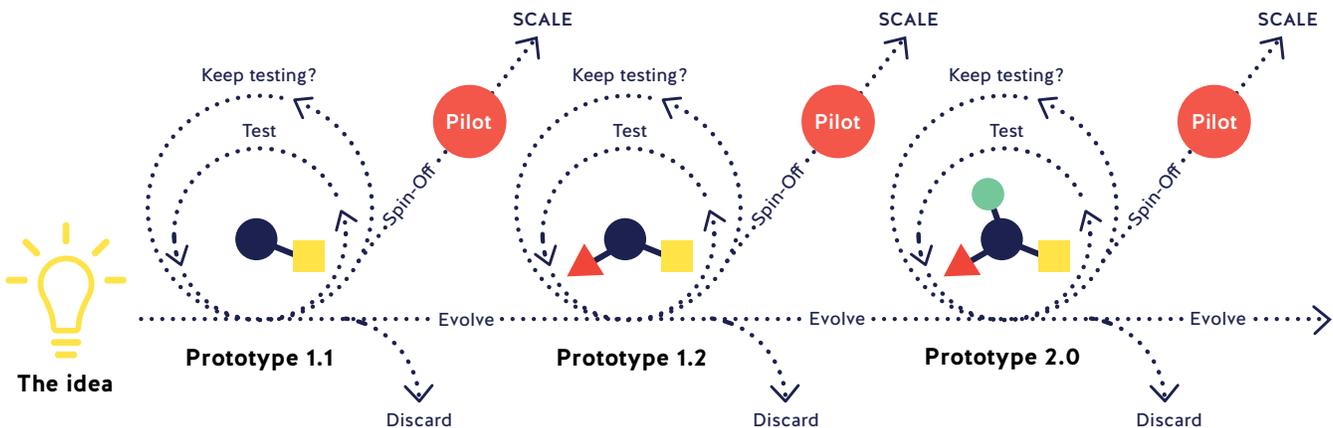
We are currently somewhere between prototype and pilot in the innovation cycle (see stages 2 and 3 on the innovation swirl). The first phase of the *Future of Home Lab* resulted in two prototypes that were then merged into a unique third prototype. As we began preparing to pilot this third prototype (described above) two opportunities emerged.

Following the innovation cycle enables us to remain committed to continual learning and improvement of ideas over time - growing what works, and letting go of what doesn't. It also enables us to be responsive and follow up on interesting opportunities that emerge at various points in the process, like prototyping a 'spin off' idea that emerges late in the game (see more on this below).

See our strategic learning brief titled "Design, Delivery, and Evaluation of the Future of Home Lab" for some of our reflections on the move from prototype to pilot.



Innovation Swirl adapted from NESTA by Mark Cabaj, Here to There Consulting (2020)



Iterative Prototyping Process by Mark Cabaj

THE OPPORTUNITIES

OPPORTUNITY #1 - PILOTING THE FULL PROTOTYPE

In the spring of 2021 we learned about a package of land in a central neighborhood in Edmonton that was to be redeveloped into a large apartment complex. One of the partners in this Lab, Skills Society, had an existing relationship with the developer. Seeing an opportunity to collaborate, we, the *Future of Home Lab* team approached the developer to explore possibilities. Much to our delight the developer was interested in collaborating to bring the imagined prototype to life as a pilot. We then jumped head first into a process of partnership formation—testing the feasibility of the ‘full prototype’ in real time in negotiations with the developer.

OPPORTUNITY #2 - PROTOTYPING A ‘SPIN OFF’ FEATURE OF THE FULL PROTOTYPE

As we were exploring the feasibility of the prototype a ‘spin off’ idea emerged. What if we took one part of the prototype that shows promise of scaling and prototyped it on it’s own? The idea to prototype and test the Community Concierge feature of the merged prototype was born.

AN ENHANCED PROPERTY MANAGEMENT SERVICE - THE ‘SPIN OFF’ PROTOTYPE

Imagine a property management service that does not just maintain a property but enhances it. In addition to all your usual property management services, our team would build and nurture community within your building. A Community Concierge helps animate the building with the help of volunteer neighbours. Together, they match-make neighbours with similar passions or interests, coordinate community activities, and keep a pulse on what’s happening in the neighbourhood surrounding the building. A highly desirable service, we help combat tenant turnover, conflict, and property abuse. Through the incorporation of principles of asset based community development we nurture a sense of community amongst residents, increasing tenant satisfaction, sense of belonging, and pride of ownership.

As this opportunity surfaced much later in the game, we have had little opportunity to pursue it but intend to in the future. If we are able to secure funding, we hope to prototype and stress test this idea as a separate prototype to the one already on its way to be piloted. What’s neat about this prototype is that it shows promise of being scalable and reaching and benefitting multiple marginalized populations, not just people with disabilities.

REFLECTIONS IN PURSUING OPPORTUNITY #1

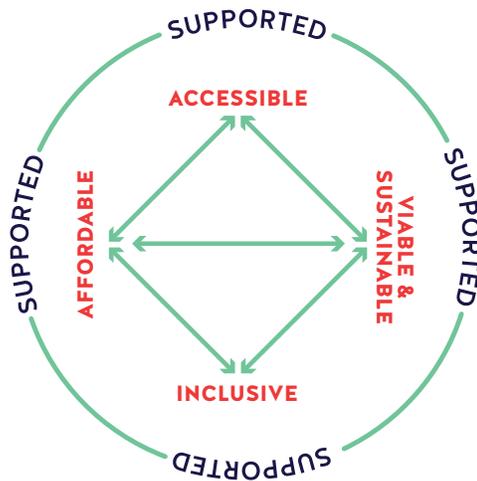
NAVIGATING TENSIONS IN MOVING TOWARDS A PILOT

In this section we discuss some key reflections related to our work on Opportunity #1 - piloting the full prototype.

As we negotiated the terms of our partnership a number of tensions surfaced. This is common when moving an idea towards a pilot and is an important part of tackling a complex challenge. The process surfaces the ways the idea does and does not fit within real life constraints. When there is a poor fit between the idea and the real life context, the team must then work to create a better fit. Our team discussed three ways of addressing tensions:

1. Focus on one or two priorities while sacrificing others
2. Optimize by making trade offs
3. Use integrative approaches to build entirely new models
(see Martin 2007 and Riel & Martin 2017 for more on integrative thinking and design)

Although using integrative approaches is the most desired, it is also often the most challenging and is not always feasible. In our case, we had the opportunity to ‘jump in’ on a development already in progress thereby placing constraints on what could be changed or added. For these reasons we focussed largely on optimizing, using integrative approaches only where possible. Additionally, sometimes neither optimization nor integration were viable options so features were sacrificed in order to move the project ahead. A summary of tensions that surfaced and how we addressed them are on the following page.



For a deeper dive into the unique tensions that emerge in building a ‘home-oriented’ housing model with and for people with developmental disabilities and (some) ways of addressing them see our Strategic Learning Brief titled “Addressing Tensions in Building an Inclusive Home Life for People with Developmental Disabilities” that can be found on our website.

TENSION	EXAMPLES	HOW WE ADDRESSED THEM
Affordability and Viability	Tension between the minimal government income support available to persons with developmental disabilities (i.e., AISH is approximately \$1,685/month) and the realities of the housing market where the minimum rent return rate is roughly \$1,250/month.	OPTIMIZED We hope to be able to offer 12 of 96 units at a deeply discounted rate affordable to someone living on AISH by reducing costs elsewhere in the building and applying for federal funding that supports affordable housing developments.
Inclusivity and Viability	Tension between the need for shared indoor and outdoor amenity space to support community building activities and the increased cost each square foot of shared space adds.	SACRIFICED Due to financial constraints, we will likely only be able to accommodate limited shared indoor and outdoor amenity spaces. Seeing value in moving the partnership ahead, we are comfortable making this sacrifice and hope to get creative in the design of the shared space to maximize functionality.
Inclusivity and Viability	Tension between having retail space in the building that can support inclusion and affordability but requires specific zoning, consumer appetite, and impinges on amenity space.	INTEGRATED With limited space to dedicate to commercial space we creatively conceptualized a ‘micro cafe’ with a minimum viable workspace and cozy seating area that can be used by customers during the day and residents in the building after hours.
Inclusivity and Viability	Tension between meaningfully supporting resident inclusion and the additional costs associated and rigid mental models around what property management entails.	INTEGRATED Inclusion supports are not typically offered to an entire building of residents nor is supporting inclusion typically thought of as part of property management. The Community Concierge role and shared social contract are new, innovative approaches to supporting inclusion and are being sold as a part of an ‘enhanced property management’ package.
Accessibility and Viability	Tension between integrating a “universal design” into a building to make it accessible to all people and the extra costs associated with integrating these features.	OPTIMIZED Due to the additional costs, and in the absence of code/law that requires higher accessibility standards, we plan to compromise by having all shared indoor and outdoor amenity areas be barrier free. In addition the 12 affordable suites will incorporate universal design principles and a subset will be fully wheelchair adapted.
Accessibility and Affordability	Tension between ensuring housing is close to community amenities and human services yet also affordable.	OPTIMIZED Because the building is located in a highly desirable, central location, market rents in the area are high, making it more difficult to offer rents at a deeply discounted rate. To address this we will make a trade off - offering fewer units at a deeply discounted rate to enable the location.

We created an MOU template based on the MOU we developed with our partner. You can view this template in the Appendix.

WHAT WE IMAGINE THE FUTURE MIGHT HOLD

Looking to the future we see the following as key next steps in continuing to move both opportunities towards pilot with the hope of adoption and scaling. Items that still require funding are marked as a “remaining barrier” as without successful funding, the project will not be able to proceed.

OPPORTUNITY #1 - PILOT OF FULL PROTOTYPE

Soon

PREPARATION FOR CONTINUED PROTOTYPING

- ▶ Apply for funding to support the social research and development (R&D) work of further refining the Community Concierge role, social contract, and PDD funded support model **Remaining Barrier**
- ▶ Participate in design conversations with developer to finalize key physical features of the building
- ▶ Apply for funding from CMHC and/or other federal, provincial, and municipal sources to enable the subset of suites to be offered at an affordable rate **Remaining Barrier**
- ▶ Apply for municipal funding to support tax incentives to further increase the financial viability of the building **Remaining Barrier**



Next
CONTINUED PROTOTYPING

- ▶ Prototype the Community Concierge role, social contract, and PDD funded support model with community in a series of workshops—working out the who, what, where, when, and how of each feature
 - Conduct a research scan into different community building approaches that may be incorporated into the Community Concierge role
 - Connect with and learn from others doing similar work
- ▶ Conduct a scan of possible partners for the community building work in immediate neighborhood and beyond and develop a plan for reaching out and onboarding new partners
- ▶ Secure funding for Community Concierge role **Remaining Barrier**



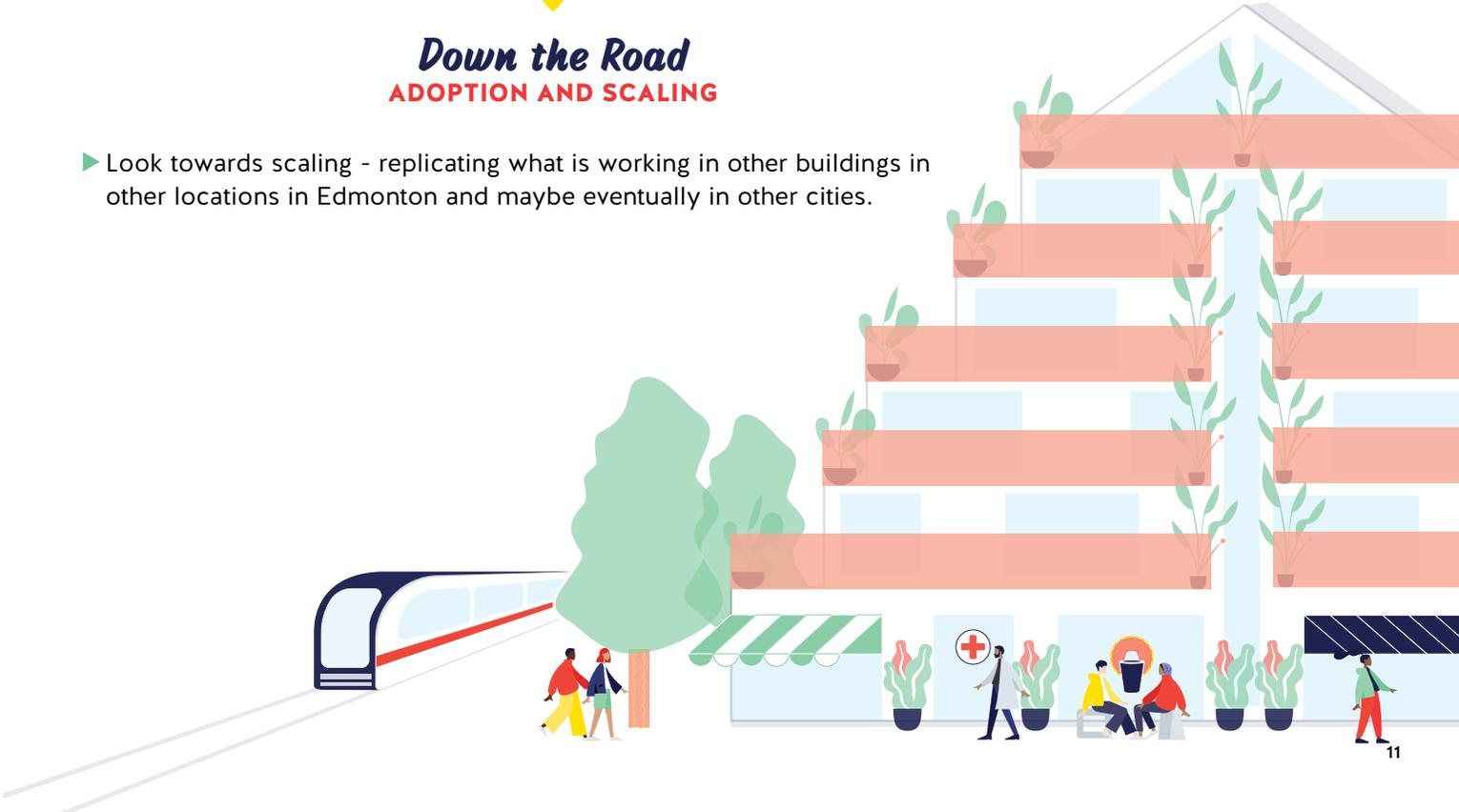
And then
PILOT

- ▶ Pilot Community Concierge, social contract, and PDD funded support model features in the real building once built
- ▶ Develop a feasibility study and business case if the idea shows promise



Down the Road
ADOPTION AND SCALING

- ▶ Look towards scaling - replicating what is working in other buildings in other locations in Edmonton and maybe eventually in other cities.



OPPORTUNITY #2 - PROTOTYPING A 'SPIN OFF' FEATURE OF THE FULL PROTOTYPE

Soon

PREPARATION FOR CONTINUED PROTOTYPING

- ▶ Secure funding to support prototyping process to be undertaken
Remaining Barrier



Next

CONTINUED PROTOTYPING

- ▶ Work with consultant to build out idea, prototype, and stress test
- ▶ Develop a business case if the idea shows promise



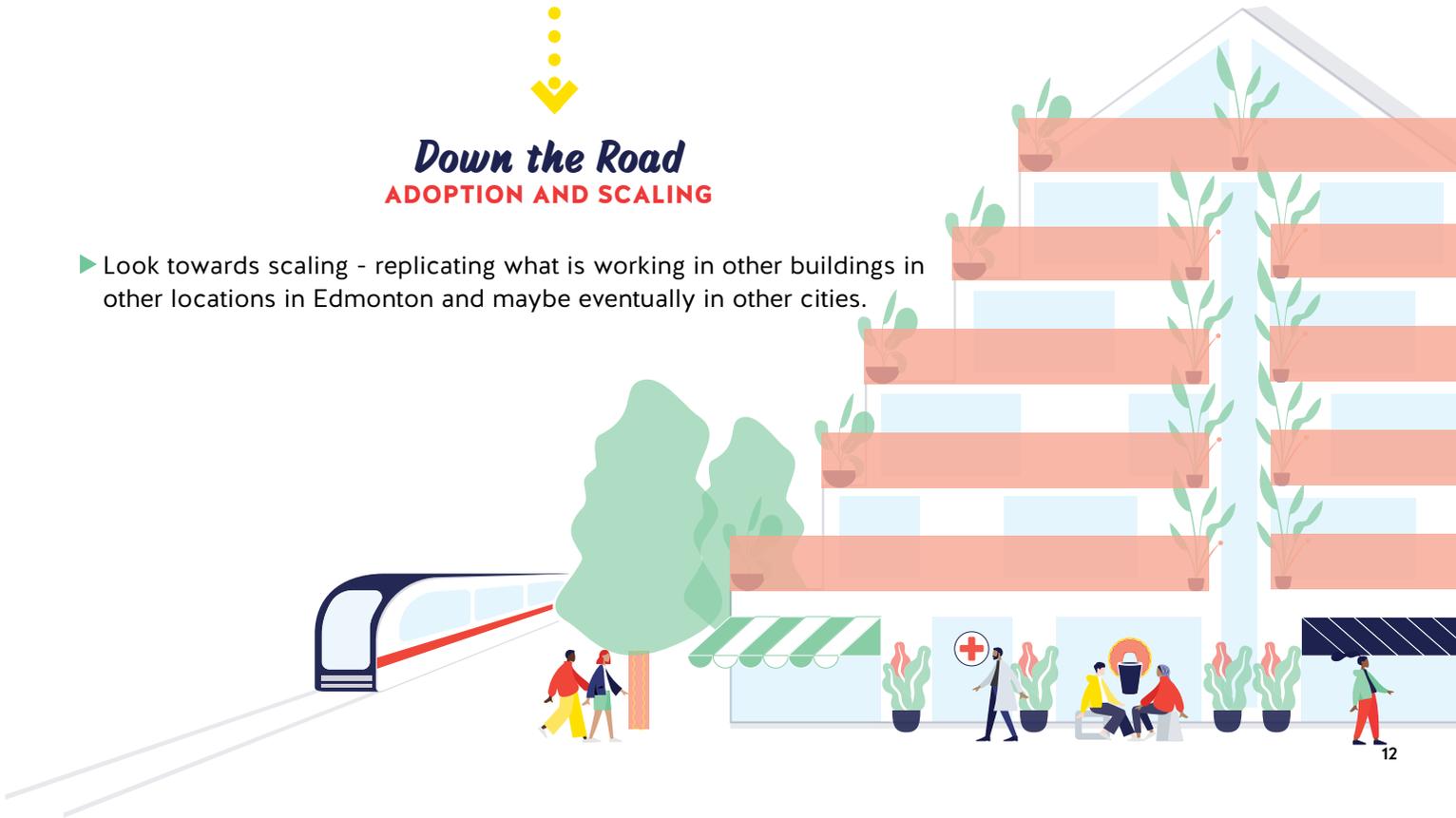
And then
PILOT

- ▶ Pilot the business model in a single location



Down the Road
ADOPTION AND SCALING

- ▶ Look towards scaling - replicating what is working in other buildings in other locations in Edmonton and maybe eventually in other cities.



SOURCES

1. Riel, Jennifer, Martin, Roger (2017). *Creating Great Choices: A Leaders Guide to Integrative Thinking*. Boston, MA: Harvard University Press.
2. Martin, Roger. (2007). *The Opposable Mind: How Successful Leaders Win Through Integrative Thinking*. Boston, MA: Harvard University Press.

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A Skills Society Action Lab project conducted in partnership with Inclusion Alberta, Civida, and Homeward Trust.



Inclusion Alberta



APPENDIX:

MEMORANDUM OF UNDERSTANDING TEMPLATE

Following is a template and example of a Memorandum Of Understanding (MOU). It is meant to be used as a starting place when drafting an MOU. Significant changes and additions will be required to make the MOU suit your own project. The section headings of the MOU can be changed to suit the specific needs of your project. Below are example headings of what were applicable to our project which was a partnership between a non profit organization and for profit developer in the creation of an apartment complex with a subset of units offered at an affordable rate to people with disabilities. Depending on your project, you might seek the advice of a Lawyer when drafting your MOU to advise as to what components are legally binding and what type of MOU is best suited to your situation.

THIS MEMORANDUM OF UNDERSTANDING made effective the ___ day of _____, 2021.

BETWEEN:

[INSERT Name of Partner #1]
(hereinafter referred to as **[Partner #1 Shorthand]**)
OF THE FIRST PART,

- and -

[INSERT Name of Partner #2]
(hereinafter referred to as **[Partner #2 Shorthand]**),
OF THE SECOND PART.

WHEREAS **[Partner #1 Shorthand]** is the registered owner of those lands situated in the Province of **[Partner #2 Shorthand]** which are legally described on Schedule “A” attached hereto (and which are hereinafter collectively referred to as the “Lands”);

WHEREAS **[INSERT Partner #1]** and **[INSERT Partner #2]** (each a “Party” and together, the “Parties”) wish to work together on a **[INSERT descriptor of project e.g. ‘affordable housing’]** project with grant funding through **[INSERT Funder Names]** (the “Project”), upon the terms and conditions hereinafter set forth;

NOW THEREFORE THIS AGREEMENT WITNESSETH that in consideration of the mutual covenants and agreements contained herein hereto covenant and agree as follows:

1. Non-Binding MOU.

[INSERT description of the type of MOU being struck - below is example text for a non binding agreement]

This Memorandum of Understanding (“MOU”) is intended to constitute an expression and mutual understanding of the Parties’ willingness to work collaboratively in support of the implementation of the Project. The Parties do not intend that this MOU will create any legally binding or enforceable rights or obligations, with the exception of Sections 5, 8, or 10(c) **[INSERT sections, if any, that are legally binding]**. Subject to the foregoing, this MOU sets out the Parties’ understanding as of the date hereof with respect to the subject matter herein, and there are no other written or oral agreements or understandings among the Parties as of the date hereof.

2. Grant Funding & Financing. **[INSERT description of what each party will do to apply for funding and what financial resources will be used to do so]**

3. Development and Use. **[INSERT description of the development and the different input each partner will have on various design elements. For example: Partner #1 will offer 22 units at a fixed monthly rent of \$1000/month. Partner #2 will provide input on the design of all 22 affordable units. All 22 affordable units will be designed to universal design specifications.]**

4. Schedule. [INSERT the suggested timelines for the project]

5. Term. The term of the agreement shall be for [INSERT Term], at which point the Parties shall have the option to renew on terms and conditions satisfactory to both Parties.

6. Property Management & Support Services. [INSERT description of the different roles each partner will have in the development. This may require a different title than the one provided in this template depending on the nature of the project. For example: Partner #1 will provide property management services which will include x, y, and z. Partner 2 will provide supports to the people living in the 22 affordable suites.]

7. Tenants of Affordable Units. [INSERT information about how the partners will support finding tenants for the affordable units (if applicable)]

8. Termination. [Below are some example termination terms. You may include all or some of these or add additional ones]. This MOU shall terminate upon the earlier of:

- a) the expiration of the Term as set out in Section 5 herein;
- b) the execution and delivery by both Parties hereto of a legally binding agreement which explicitly restates or replaces this MOU;
- c) the mutual agreement of the Parties in writing; or
- d) 60 days' written notice from one Party to the other Party.

Upon the termination of this MOU, no Party shall be liable to the other for any claims, actions, costs, damages or losses whatsoever relating to this MOU and the transactions contemplated herein, except as may exist under or as a result of a breach of Sections 5, 8, or 10(c) [INSERT sections that are legally binding].

9. Confidentiality. [You might wish to include a section on confidentiality. You will need to decide together with your partners what terms are appropriate here. Below is an example.]

None of the information provided by either Party to the other Party during the course of the Project shall be utilized by the recipient thereof except in connection with, in furtherance of, and with respect to, the Project. No public announcement in respect of this MOU or the Project shall be made by either party without the express written consent of the other Party, except as required by applicable law.

10. General Matters. [This is a catch all section where you can include any particulars that did not fit in any above categories]

- A) The parties hereto warrant that they are duly incorporated and existing with the power, authority and capacity to carry out the transactions contemplated herein, all of which have been duly and validly authorized.
- B) Time shall be the essence of this Agreement and the transactions contemplated herein.

C) All notices required or permitted to be given hereunder to the **[INSERT Partner #1 Name]** shall be effectively given by letter delivered on any business day by hand addressed to it at:

[Partner #1 Contact]

and any notices required or permitted to be given hereunder to **[INSERT Partner #2 Name]** shall be effectively given by letter delivered on any business day by hand to it at:

[Partner #2 Contact]

and any notices shall be deemed to be delivered on the day of such delivery.

D) This Agreement shall be governed by the laws of the Province of **[xxx]** and the parties agree to attorn to the jurisdiction of the courts of the Province of **[xxx]**.

E) This Agreement constitutes the entire Agreement between the parties respecting the matters set out herein and any other previous agreements, written or otherwise are completely merged herein.

F) No modification or amendment to this MOU may be made except by an instrument in writing signed by both Parties.

G) This Agreement may not be assigned by **[INSERT Partner #1 Name]** or **[INSERT Partner #2 Name]**.

H) This MOU may be executed in counterparts, and may be signed by facsimile or other means of electronic communication capable of producing a printed copy, each of which so signed shall be deemed to be an original, and such counterparts together shall constitute one and the same instrument, and notwithstanding the date of execution, shall be deemed to bear the date first written above.

IN WITNESS WHEREOF the Parties have executed this Agreement as of the day and year first above written.

[INSERT Partner #1 Name]

[INSERT Partner #2 Name]

Per:_____

Per:_____