

Building With Mission Playbook

Supporting mission-driven health organizations to build more affordable housing options for older adults

DECEMBER 2021

Building with Mission is a CMHC National Housing Strategy Solutions Lab.

This Playbook was authored by the Building With Mission project team and partners.

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Building with Mission Playbook

The Building With Mission Playbook was written to support Canadian health care organizations, and other mission-driven organizations, interested in building new, more affordable housing for older adults.

Health care organizations across the country are increasingly being challenged to look beyond the walls of their institution. Rather than focusing exclusively on creating health for their patients, they are looking to take a leading role in improving the health and well-being for the broader community that they serve.

In order to do this, they are considering how they might influence a wide range of social determinants of health, particularly housing for vulnerable populations who are often heavy users of health care services.

Across the country, in large urban settings and in smaller rural communities, more affordable housing is a critical need. Most markets lack sufficient supply of appropriate and affordable housing for low and middle income seniors who require low to moderate levels of support to live independently. Almost 20% of Canadian seniors spend over 30% of their gross income on housing, and this increases to approximately 40% for seniors who live alone.¹ Housing is considered affordable if it costs less than 30% of a household's before-tax income, therefore, a large proportion of older adults are living in housing that is not affordable.

We know that overwhelmingly Canadians want to age in their homes and communities, not in institutions. In fact, 96% of Canadians 65 years and older say that they will do everything they can to avoid moving into a long term care home.² In order to meet the wishes of older adults, and to maximize well-being and independence, it's important that Canadians age in the "right" place. The affordability of homes, as well as their location, physical design, and proximity to amenities and supportive programs and services has a significant impact on older adults' ability to maintain their health and age with dignity. The right housing can also reduce older adults' health service utilization and prevent/delay the need to move into expensive settings such as long-term care. Housing, coupled with supportive services, is increasingly being seen as a vital and much needed health intervention for many older adults.

Health care organizations have an opportunity to amplify their impact and to improve health outcomes for individuals and for communities by stepping into a leadership role to advocate for and build new types of more affordable and more supportive housing for older adults. Health organizations bring a unique set of capabilities, assets and knowledge of the needs of older adults, making them well positioned to work with community partners to get new housing, designed specifically for older adults, built.

¹ Report on Housing Needs of Seniors, prepared for the Federal, Provincial and Territorial Forum of Ministers Responsible for Seniors, June 2019

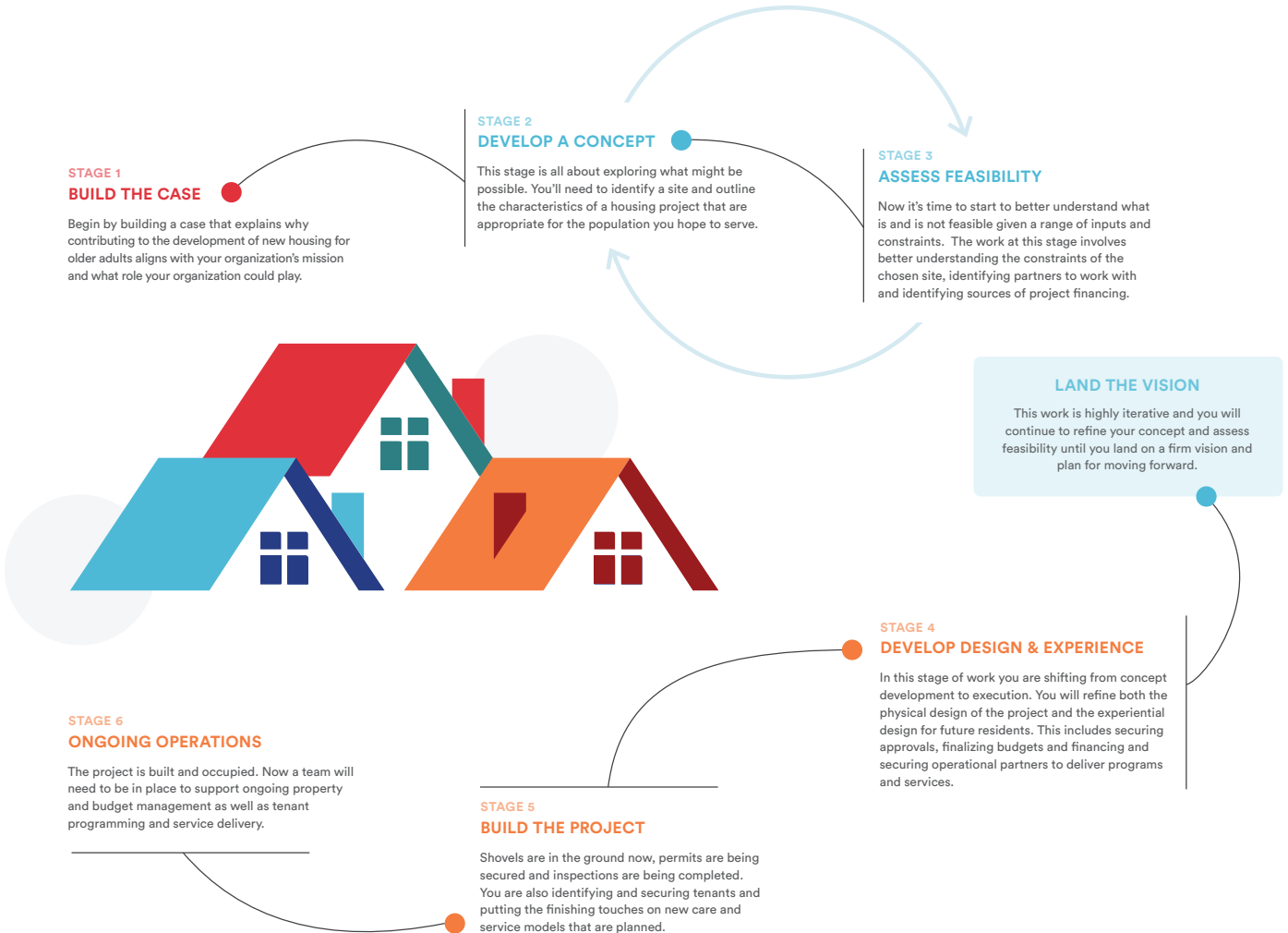
² National Institute on Aging, Pandemic Perspectives on Long Term Care, March 2021

We cannot stop the clock on aging, but we can ensure that Canadians are provided the opportunity to live well in their later years. Increasing the supply and range of housing options for older adults is an urgent challenge.

This playbook is intended as a guide for those health organizations that see housing as aligned with their mission and values, but might be new to this work. We hope it inspires and equips leaders to jump in, initiate conversations and get started. Perhaps your organization has underutilized land that can be redeveloped or knows of available and affordable sites. Perhaps your organization has the internal capacity to take on a leadership role in a new project or to support the delivery of programs and services once a site is operational. Your organization will not need to do this work alone. By putting together a strong project team and working with project partners, it will be possible to leverage deep cross-sector expertise.

The Building with Mission Playbook provides an overview of the six key stages of the development process. It highlights the goals of each of these stages, the key questions to ask and the steps that will need to be taken along the way. The Building with Mission website (www.buildingwithmission.ca) also provides a library of helpful resources and tools to help get the conversation started about housing and the role mission-driven health organizations might play.

SNAPSHOT OF THE SIX STAGES OF THE BUILDING WITH MISSION PLAYBOOK



SNAPSHOT OF THE KEY STEPS FROM PROJECT INITIATION TO COMPLETION

	STAGE 1	STAGE 2	STAGE 3	STAGE 4	STAGE 5	STAGE 6
<i>Note that many of the steps outlined in any stage will be iterative and will occur concurrently</i>	Build the Case	Develop a Concept	Assess Feasibility	Develop Design & Experience	Build the Project	Ongoing Operations
Time Required	~3 - 6 months	~6 - 24 months		~4 - 12 months	~12-18 months	~20-50+ years
Relative Investment Required*	\$	\$\$	\$\$	\$\$\$	\$\$\$\$	\$\$

KEY ACTIVITIES						
Clarify & Maintain the Mission and Vision	Understand the housing needs of older adults in your community Assess alignment of housing with your organization's mission, strategy and capacity	Articulate the project vision and establish design principles	<i>Continue to check in with you project vision and design principles to make sure you stay on course</i>			Review Performance
Confirm & Sustain Organizational Support	Build the case for your organization's involvement in housing Secure organizational commitment to explore development options and feasibility	<i>Continue to report back on progress and confirm ongoing support</i>	Land the vision and make a case for moving forward with a development project	<i>Continue to report back on progress and confirm ongoing support</i>		
Identify Project Team & Partners	Identify potential project team members, partners and stakeholders	Assemble a project team Engage and select project partners	<i>Continue to work closely with project team and partners</i>	Create partnership agreements	<i>Continue to work closely with project team and partners</i>	
Work Closely with Key Stakeholders (including older adults)		Engage key stakeholders, including older adults	Meet with municipal staff for a planning pre-consultation meeting	<i>Keep your key stakeholders up to date on progress</i>	<i>Maintain community relations Continue to engage with tenants</i>	
Secure a Site	<i>You may or may not already have a site in mind at this stage</i>	Identify and evaluate the suitability of project site(s)	Complete a site investigation and market analysis	Secure the land (if you don't already own it)		
Develop a Design & Build the Project		Identify and select appropriate housing model(s) for your target population (focus on the physical design) Develop a preliminary architectural program and design concept	<i>Work with partners to iterate and refine the design concept as needed</i>	Refine and finalize architectural design Obtain municipal approvals Work with project team to undertake construction tender	Construction administration Complete construction and obtain municipal occupancy permit Work with project team to address deficiencies	Coordinate with the project team during the one-year warranty period
Develop an Operational / Experiential Concept & Operate the Project		Identify and select appropriate housing model(s) for your target population (focus on the tenant experience and operating model)	<i>Work with partners to iterate and refine the operating model, including any programs and services that might be offered to tenants</i>		Market the project and begin lease-up preparations	Complete lease-up Ongoing property management Coordinate programing and services
Develop Project Budgets & Secure Funding		Identify possible sources of funding	Draft capital and operating budgets to assess preliminary feasibility Revisit the design concept and budgets as needed to ensure a feasible project	Secure project funding and financing Finalize capital and operating budgets	Coordinate funding and financing draws	Manage the operating budget Report to funders and lenders

*Costs are highly dependent on the size and complexity of the project. We have attempted to demonstrate the relative cost of each stage of work.

Message from the lead project sponsor

Catalyzing Change Through Building With Mission

CATHOLIC HEALTH ALLIANCE OF CANADA

The Catholic Health Alliance of Canada supports health organizations with Catholic identity to be leaders and advocates in making the ever-evolving health system stronger and more responsive, drawing on our Catholic values, and a legacy of innovation and ethical reflection. The Catholic Health Alliance of Canada is the lead sponsor of the Building with Mission Solutions Lab.

All health service providers, whether autonomous or part of a larger health system, are being challenged to look beyond their own environment of care to identify and re-frame the role the organization will play in creating a healthier community. Resulting action can be to provide community leadership or to adjust the service offerings of the organization itself, or both.

Literature and leading practice are helping it become more widely understood that health status is influenced by many factors other than genetics and health care, such as social determinants of health including education, income, housing, and environment. Health service providers have opportunities to collaborate with housing, education, transportation, social service, and urban planning stakeholders to evaluate the overall health needs of a community, and to take action to address priority areas.

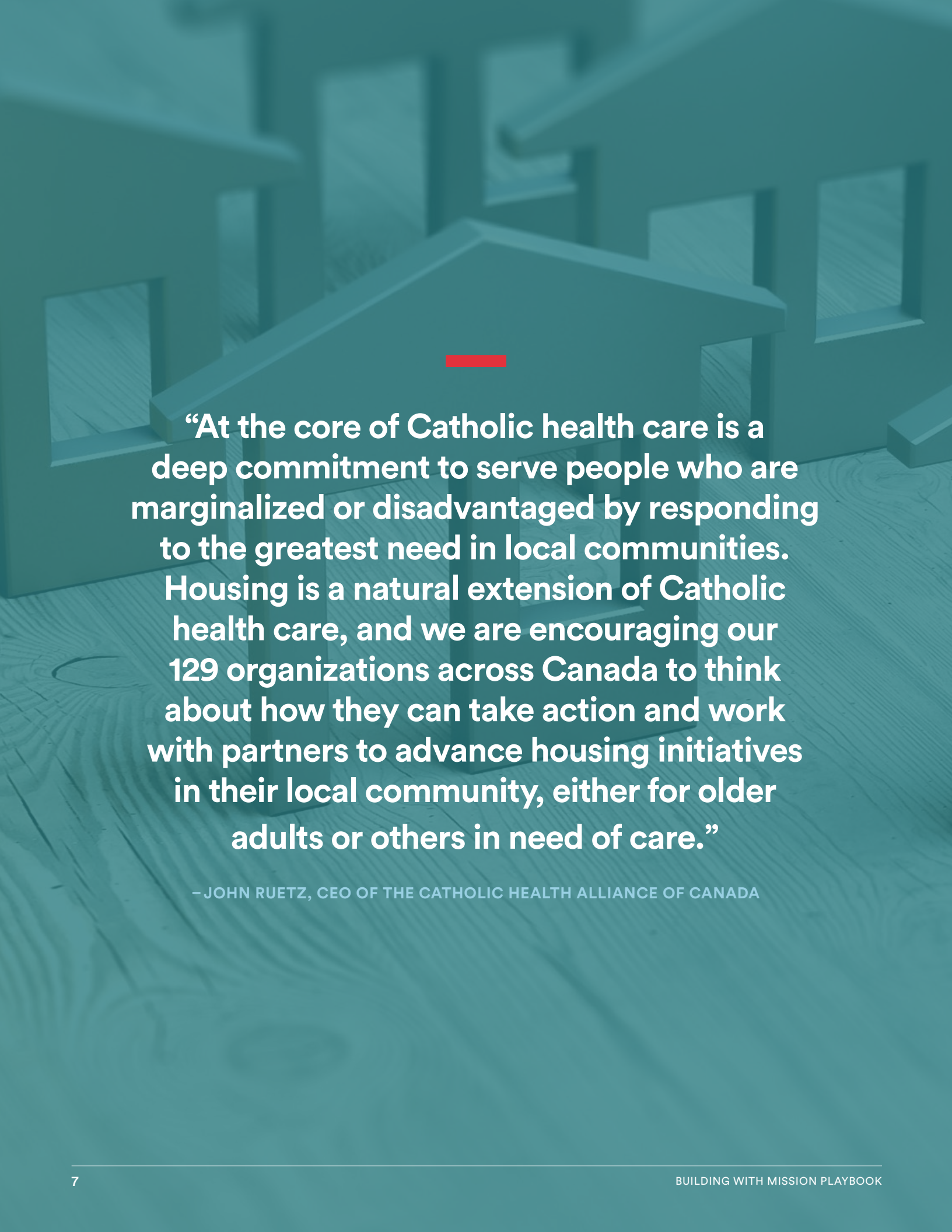
Housing is clearly one of the most significant priorities to be addressed. Community needs assessments have demonstrated that there is a widespread dearth of affordable housing across Canada, affecting both large urban and small rural communities.

We know that homes and communities, their physical design, the availability of supportive programs and services nearby and their affordability are particularly important to ensuring the health, well-being and dignity of older Canadians. As mission-driven health organizations, we can improve health outcomes for individuals and communities and amplify our impact by helping to challenge the mindsets, norms and business models that are no longer serving older adults or their families well.

There is much work to be done to demonstrate and scale new models of housing and care that better serve older adults, and health organizations bring a unique perspective and expertise to this work. Together with experts in municipal planning, housing development, community services and others, mission-driven health organizations play an important role in co-creating a better future of health at home for Canada's older adults.

Building With Mission has created this tactical playbook to support organizations and leaders who are new to housing work, with a goal to accelerate project initiation. The playbook is intended to bring together expertise from a variety of partners and disciplines to advance housing initiatives in communities across the country.

Any progressive organization must look at its role as part of the larger community, and there is no room for any organization not to be community minded. There is a need for board members and leaders to be addressing vulnerable populations and to look at social determinants of health and health equity. While daunting, each health care leader and each health organization can effect change. Collectively, we are compelled to act now and have a responsibility to do so.



“At the core of Catholic health care is a deep commitment to serve people who are marginalized or disadvantaged by responding to the greatest need in local communities. Housing is a natural extension of Catholic health care, and we are encouraging our 129 organizations across Canada to think about how they can take action and work with partners to advance housing initiatives in their local community, either for older adults or others in need of care.”

– JOHN RUETZ, CEO OF THE CATHOLIC HEALTH ALLIANCE OF CANADA



STAGE 1

BUILD THE CASE

1. Understand the housing needs of older adults in your community

Start by conducting a community **needs assessment**. Research existing housing options in your community, anticipated local demographics, and the segment/subset of older adults who are not well served. To complete the assessment, you may want to reach out to your local municipality's housing staff or to community organizations for data and to get their feedback on the housing needs in the community. As you are undertaking this assessment, consider the challenges and gaps related to affordability, physical design and accessibility, the need for supportive programs and services (e.g. experiential design), local housing market trends and the demand/supply of housing for older adults with different income levels and different care/support needs.

Check in with your municipality, as a housing needs assessment of some kind may have already been completed that you can build from. For more information on the kind of information you will want to consider when conducting a needs assessment, review pages 21-24 of "A Step-by-Step Guide to Developing Affordable Housing" prepared by [The Sustainable Housing Initiative](#). Although this guide does not specifically focus on the needs of older adults, it does provide useful and applicable guidance for organizations seeking to develop, build, and operate affordable rental housing.

Develop a **problem map**. Work with leaders and experts in your organization to develop a common understanding and consensus around the types of housing problems that need to be addressed in your community.



Tools to Try: The Building With Mission team ran a problem mapping exercise with St. Joseph's Continuing Care Centre to identify the housing gaps faced by older adults in Cornwall, Ontario. More on these scenarios and the process for generating them can be found [here](#).

Explore what the **future of housing, health and aging** might look like in your community in 10-20 years. To do this, try a foresight exercise to align leaders around a shared view of how the future could evolve. Developing or reviewing possible future scenarios is one way to bring people together to discuss the strategic implications for your organization of different possible futures.



Tools to Try: The Building With Mission team developed four future [scenarios](#) at the intersection of housing, health and aging that can help to get you started. These scenarios and the process for generating them can be found [here](#). Share these and use them as the jumping off point for internal discussions about how you may want to move forward.

Develop a short-list of **priority populations** you may want to serve through your housing work and the rationale for serving these segments of the population (e.g. opportunity for health system cost savings, improved health outcomes and quality of life). Focusing on a specific group of older adults (e.g. low income older adults, older adults with dementia, etc.) will be helpful as you plan both the physical environment and the experiential supports that they may need. You may also consider serving multiple segments within a single project.

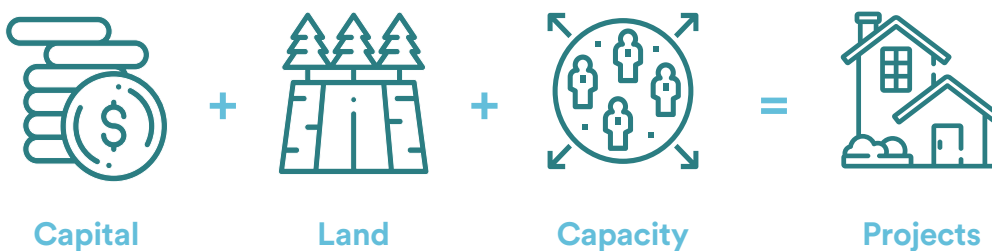
2. Assess alignment of housing with your organization’s mission, strategy and capacity

Review your organization’s mission, vision and values, as well as strategic direction, and make the case for how **housing aligns**. Take into consideration the broader health and social care landscape locally, provincially, and nationally.

Next, identify which **resources** your organization could uniquely bring to this work and what **role(s)** your organization could play in the development and operation of a new housing project. For example, will your organization provide land and/or capital to develop a project? Will your organization own and operate the housing once it’s built or do you need to find a partner organization such as a housing provider and/or property manager to fill this role? Does your organization have the capacity and time to manage a development project, or should you consider working with a development consultant? This exercise will help inform what type of project team you will need to assemble and what type of partners your organization might require to undertake a development project.

Cahdco, a non-profit real estate development corporation located in Ottawa, Ontario has developed this overview of the key resources required in any housing project. While capital and land can be challenging to secure, it is often an organization’s capacity to carry out a project that is the most challenging resource to secure. This is where partnerships with other organizations, as well as engaging the appropriate consultants to support your efforts can help to advance a new housing project.

Figure 1: Resources Required



Source: Cahdco

In their book, Making Housing Affordable, Indwell uses the acronym SHIP to describe the kinds of resources and capital that any organization might be able to bring to a housing project. SHIP stands for social, human, intellectual, and physical capital.

Table 1: Indwell's Overview of Social, Human, Intellectual and Physical (SHIP) Capital

TYPE OF CAPITAL	DEFINITION
Social Capital	This refers to networks, relationships, and trust. This takes time to foster, can't be bought, and is all about relationships. Three key elements here are credibility, stability, and sustainability.
Human Capital	This refers to the people on your team and those you work with. You need to have enough people to follow through with this development process. Having people who have passion, dedication, and high levels of integrity is a must. This capital will also require careful consideration for who you hire as consultants and contractors.
Intellectual Capital	This is what you know, your technical prowess, your skills. This relates deeply to human capital, but measures ability. You could have networks and capacity, but would still need tangible skills.
Physical Capital	This refers to anything physical: money, assets, tools, land, etc. This is often where people start, but it actually comes after the other three in terms of importance.



Helpful Resources: For more information on the role your organization could play, review [The Roles That Healthcare Delivery Organizations Can Play in Building Housing](#)

Finally, consider conducting an assessment of your organizational readiness in order to identify areas that may require further attention.



Helpful Resources: This [Organizational Readiness Assessment](#), created by the University of Toronto School of Cities and Social Purpose Real Estate (SPRE) Toronto, is a valuable tool to evaluate how prepared your organization may be to take on a social purpose real estate project.

3. Identify potential project team members, partners and stakeholders

Once you have a better idea of what role(s) your organization might play in developing and operating affordable housing for older adults, and what capacity your organization has to carry out a project, you can begin to identify others that you might work with to move a project forward.

There are three key groups to consider: the project team, project partners and other key stakeholders. In this stage, you will want to begin to identify priority groups in each of these categories. You may begin to reach out for casual conversations but more formal engagement will occur in Stage 2.



Tools to try: To generate a list of who you may want to work with and engage in this work, consider conducting a [stakeholder mapping](#) exercise.

Table 2: Parties to Work With

 PROJECT TEAM	 PROJECT PARTNERS	 STAKEHOLDERS
<p>This group is tasked with leading and managing the development of the project and includes your organization plus any consultants that you might engage to help carry out the development activities required.</p>	<p>This group includes any partners you might need to work with to supplement your organization's capacity to own and operate a housing project.</p>	<p>This group includes key individuals, groups and organizations that have an interest in the project in some way and/or who can bring unique expertise to the development of the project.</p>
EXAMPLES OF GROUPS TO ENGAGE		
<p>Development consultant or project manager to assist with the coordination of day-to-day activities to keep the project moving forward, assist with budget development and funding/financing applications and draws</p> <p>Architect to develop the project design; the architect will also work with sub-consultants such as a landscape architect, civil/mechanical/electrical/structural engineers</p> <p>Construction manager to assist with project costing, coordination of the tender bidding process, and construction</p>	<p>Land owner willing to provide land for the development, if you do not already own land</p> <p>Housing provider that will operate and manage the housing component of a project (collecting rents, communications with tenants, etc.)</p> <p>Property manager to ensure the building(s) run smoothly and are maintained</p> <p>Service providers who will provide support services (health care services, community programming, etc.) to the tenants such as home care agencies, hospitals, community organizations, etc.</p> <p><i>*You will want to work closely with your project partners in the following steps of the development process, as their insights can inform the project design, budgets, target population, services provided, and so on.</i></p>	<p>Funders and lenders for the project</p> <p>Regulators such as the local municipality that will provide planning and development approvals and the health services authority that may be interested in supporting care delivery for older adults in a new type of setting</p> <p>Community groups and organizations that serve the housing and/or care needs of older adults and those that represent the residents and business in the neighbourhood</p> <p>Older adults (future potential tenants) who can help to inform the project scope and direction</p>

4. Build the case for your organization's involvement in housing

Bring together the findings from all of the work undertaken in the previous steps of this stage (i.e. preliminary needs assessment, missional alignment, organizational capacity review, stakeholder mapping, etc) to create a strong **case for moving forward** with further feasibility work.

Identify next steps, such as engaging a project team, developing a high-level project work plan, identifying potential partners, and securing the necessary funding for early stage work (i.e. pre-development funding such as CMHC SEED funding to hire a project lead, conduct initial workshops, hire outside expertise, etc.).

5. Secure organizational commitment to explore development options and feasibility

Present the case for your organization to further explore the role it can play in housing development for older adults to senior leadership. Involvement and support from your Board of Directors early in this work is critical. You may even request a Board motion or amendment to the organizational mission to confirm organizational support for this work before moving forward to the next stage.

Establish an ongoing **governance and/or advisory structure** for this work, such as a steering committee or advisory group, that will report back regularly to senior leadership on progress.

STAGE 2

DEVELOP A CONCEPT



Although presented as linear, these steps are highly iterative and will take place concurrently. You will continue to revisit each step as you learn more throughout the project until you land on a firm vision and plan for moving forward.

1. Assemble a project team

It is time to put together a **project team**. Hire a development consultant and architect / design consultant to help navigate the subsequent steps of the pre-development process. Depending on your organization's procurement policies, you may need to issue a Request for Expression of Interest/Request for Proposal to get multiple consultant bids. "Share the work you did in Stage 1 to inform the scope of the work that will follow. The design and development team you choose to work with will be essential in subsequent project stages. Aim to assemble a project team with experience in affordable housing, supportive housing and/or seniors housing as well as experience working with non-profit organizations to gain the benefit of their experience. One thing to be mindful of is that if you need to partner with an organization to become the housing provider for your project, you will want to include them in any decisions regarding the project team engagement/selection.

Cahdco, a partner on the Building with Mission project, Indwell and SHS Consulting are examples of Ontario based teams with this type of experience. Once brought onboard, these development consultants will advise on next steps and assist and guide you through hiring other consultants, such as the construction manager and financial consultants at the appropriate time. They will also help to facilitate conversations around the design concept with the architectural team.

2. Identify and select appropriate housing model(s) for your target population

At this stage you will want to **identify, evaluate and select a preferred housing model** in order to proceed with a design. Review the range of housing options that may meet the needs of your target population (e.g. affordable seniors apartments, campus of care models, dementia villages, cluster models, etc.). It is worth noting that some forms of housing will not be suitable on some sites (e.g. size of the site, zoning restrictions) so if you already have a site in mind, you may want to be more focused in your review of the options available to you.



Helpful Resources: Building with Mission's [Periodic Table of Housing Models for Older Canadians](#) provides a helpful framework and overview of precedents to consider and tries to make this research stage faster and easier.

As you engage with stakeholders and potential partners, explore the housing models you are considering and discuss their desirability, suitability and feasibility. Reflect on both the physical form of these different models (e.g. the **built environment**) as well as the resident experience, services provided and operating models (e.g. the **non-built environment**).

If you are hoping to build **affordable housing**, it will be useful to understand some of the unique challenges associated with building affordable housing.

3. Identify and evaluate the suitability of a project site(s)

If your organization already owns a possible site for redevelopment (underutilized land or a building that might be repurposed), begin **internal conversations** about:

- **Potential uses:** Would a housing project be complementary to other potential uses or would you need to choose one use over another? If you have an existing building that you hope to preserve or an available site, can it even be repurposed as housing?
- **Financial requirements:** Is it important to generate a return on the site (a market rate return or a target return on investment)? Are you willing to consider a social purpose for the site where you do not optimize for return?

If your organization does not own a site, conduct some initial due diligence by **identifying and assessing potential sites** for their suitability for housing for older adults (e.g. size, location, proximity to services and transit). You may want to engage your development consultant to support this work as they will have experience in this area. If you identify a site(s) of interest you will want to engage with the property owner to better understand their goals and motivations, financial requirements and other potential uses. Securing affordable/free land will be critical to keeping project costs down, so seeking out land owners who are motivated by mission and social goals will be important (e.g. religious institutions, the municipality).

If you successfully find a project partner interested in providing affordable land, establish an initial **memorandum of understanding** describing the nature of the potential relationship between your organizations. You will want to begin to outline details such as whether the site is being leased or sold, for what purpose the site will be used, and under what conditions you will work together.

4. Articulate the project vision and establish development principles

Draft a **project vision and mission** that describes who you want to serve, project priorities / preferences and guiding values. Alongside this, create **development principles** to establish key parameters for the project going forward. Share these with potential partners and your project team.

Your development principles should describe:

- The physical design characteristics that are important to you (e.g. a reflection of the faith based / spiritual history of the site, heritage preservation, incorporating community space, adaptable unit design, etc.)
- The experiential characteristics that are important to you (e.g. onsite care provision, community programming, connections to nature, intergenerational interaction, etc.)

For the redevelopment of a large site in Kingston, Ontario, the Board of Providence Village developed a vision, mission and set of values and principles to guide their work and choice of development partners.

Vision: A neighbourhood of people helping people, inspiring hope, fulfillment and care of the Earth.

Mission: Providence Village is a community of hope, belonging and wellbeing for the vulnerable where diverse partners offer compassionate care and support services to honour and continue the spirit and Catholic legacy of the Sisters of Providence of St. Vincent de Paul.

Values that will guide the actions of Providence Village

- Compassion – A response to the suffering of others that motivates a desire to help.
- Respect – A feeling of understanding that someone is important and should be treated in an appropriate way.
- Integrity – The quality of being honest, fair and having strong moral principles.

Principles that will guide the development and operation of Providence Village

- Uphold a spirit of humility, simplicity and charity,
- Demonstrate responsible stewardship of resources,
- Create opportunities to connect, innovate and collaborate,
- Be open, welcoming and supportive,
- Foster holistic life and wellness.

As part of their early work to develop a new housing concept for older adults, SE Health developed a set of design principles informed through an extensive landscape scan and through co-design with older adults and subject matter experts. SE Health is hoping to build new homes for older adults which adhere to these design principles:

1. **High quality** homes that inspire pride in residents and are designed to be operationally efficient over the long term.
2. **Maximize wellbeing** for older residents through the application of universal design.
3. **Adaptive & flexible units**, as well as common areas, to enable ageing-in-place as people's situations evolve, and to create an atmosphere where families and friends will seamlessly flow.
4. **Designed for future needs and desires** and challenges societal notions of what ageing looks like.
5. **Integrated within neighbourhoods** to create an open and diverse community where all ages are welcome.
6. **Rooted in a non-medical model of health;** design a built environment that creates wellbeing; where residents can choose to invite service providers into their homes as needed.
7. **Incorporate technology & access to nature** into the design to support seamless wellbeing and autonomy.

5. Engage potential project partners and key stakeholders, including older adults

Reach out to the potential project partners and key stakeholders you identified in Stage 1 (refer to Table 2) to get their **input and feedback** as you refine your project vision and develop a more specific design concept. Be prepared to share the information you've collected so far demonstrating the need for new housing for older adults in the community, your organization's interest in the project and the potential roles your organization may fill.

You will also want to better understand how other organizations may be able to **support the project** by providing capital, planning capacity, expertise, operating support, etc. Be open to creative opportunities to work with others and keep in mind the **key roles** that will need to be filled to make your project successful.

As you **identify partners** to fill the key roles, you will want to establish an initial **memorandum of understanding** with these organizations. You may even decide to update the project governance structure to include committed partners in the formal decision making processes. To ensure mission and vision alignment with your selected key partners, you may also choose to establish a project charter that all partners sign on to, which outlines each organizations' role, responsibilities and level of commitment. Moving forward these relationships will be formalized through contractual agreements.

In some projects, there will be a desire to offer older adults access to a set of services and programs in addition to housing. These supportive services are usually intended to contribute to a positive resident experience, to support physical, social and mental well-being, to enable older adults to remain in their homes independently for longer and/or to provide care services. To begin, you may want to create an inventory of the types of services, programs and supports you would like to offer residents. Services and programs may be delivered through partnerships with other agencies, community organizations and/or service providers or could be delivered by your organization. Map out who you might want to work with and how you could work together. Also begin to map out what the overall tenant experience and/or care pathway could look like. This is particularly important at this stage if these choices influence the design of spaces within the building (e.g. unit design, communal spaces, etc.). Naturally, service provision choices will be influenced by the target population you intend to serve.



Tools to Try: Building with Mission Demonstration Site, [SE Health](#), used prototyping to think through the range of services and programs that could be offered in a new seniors building. More information about this work and an overview of the [prototyping](#) process can be found on the Building With Mission website.

At this stage you will also want to **involve older adults** so that they can be part of shaping the project. Working with older adults can and should be done at various stages of your work as you refine the project plans. The goal is to ensure that you understand their needs and desires first hand; remember, you are designing for (and ideally with) them. For example, you may want to get input on housing needs and desires, co-develop/validate your vision and design principles, test attractiveness of different housing options, etc.



Tools to Try: One way to help you better understand who you are designing for is to create personas of the different people who may one day live in the housing you hope to build. To get you started, the Building With Mission team has developed six personas and have shared an overview of the process.

6. Develop a preliminary architectural program and design concept

Work with your architectural team to develop an initial **architectural program** and **schematic design**. This will be an opportunity to develop rough drawings of a site plan, floor plans, elevations and landscape design that future planning and design experts can build off of and that can be used to share with outside stakeholders.

Share background information, your project vision and mission, development principles and scope of work. Keep in mind that you will go through many iterations of the architectural program throughout the pre-development process, but the initial drafts will be important for your financial assumptions.

Since you are building housing for older adults, it will be important to try to incorporate a range of amenities and communal spaces that can enable older adults to sustain their health and well-being and remain in their homes independently for longer. For example, you may want to incorporate spaces for tenants to socialize in such as gardens or other outdoor spaces, spaces for programming and service delivery such as a large multi-purpose space, and/or community spaces for project partners to locate services in such as a day-care, library, seniors hub or health clinic.

7. Identify possible sources of funding

Begin to identify possible sources of **external funding** to help cover your a) pre-development and feasibility assessment work and/or b) your development costs and note carefully any eligibility requirements. Now is the time to learn about municipal, provincial and federal priorities and funding programs related to affordable housing and/or housing for older adults. You will want to work closely with your development consultant to assist you in identifying possible sources of funding, and ensuring your project can meet the requirements of promising funders. While some funding sources are offered nationally, many are very specific to the local province and/or municipality.



Helpful Resources: This summary of Sources of Funding for the Development of Affordable Housing is a helpful starting point.

You will also want to initiate internal conversations about your organization's willingness to make a **capital contribution** to the project. Consider questions such as: How would this investment decision be made and by whom? Are there reserves that could be drawn on? Is there an appetite and ability to fundraise for this project? All projects will require some contribution of equity and determining how this will be sourced is important at this stage.

STAGE 3

ASSESS FEASIBILITY



Although presented as linear, these steps are highly iterative and will take place concurrently. You will continue to revisit each step as you learn more throughout the project until you land on a firm vision and plan for moving forward.

1. Complete a site investigation and market analysis

With greater clarity now around the type of project you are interested in pursuing, and on which site you would like to build it, continue to work with your project team to **conduct further site investigation**. The site investigation should carefully examine site boundaries and topography through a survey plan, identify abutting properties and current uses, identify environmental concerns through an Environmental Site Assessment, confirm soil conditions through a Geotechnical Assessment, evaluate access points to the site, review site utilities and current site zoning. If considering adaptive reuse of a building, you will need to complete a building conditions assessment as well.

You will also want to conduct a **market analysis**. This is especially important if you plan to incorporate market-rate housing and/or retail space in the project. Integrating housing for tenants across a range of income levels (i.e. mixing both market-rate and affordable units) is one way to enhance the financial viability of the project where the market-rate units help to offset the cost of affordable units. A market analysis will review the demand and market rate of different types of spaces/units, as well as local vacancy rates, existing and planned stock, and waiting lists for affordable housing. This information will influence both the design of the project and the pro forma analysis.

2. Meet with municipal staff for a planning pre-consultation meeting

Up to this point, you likely have had limited engagement with the municipality (unless they are a partner in providing an available site). It is important to **meet with the municipal planning team** to ensure they are aware of your preliminary plans, and to get feedback on the proposed project. City planning staff will also be able to help you identify what types of municipal approvals will be required for your project. You will want to establish a positive working relationship with municipal staff, ensure that their planning requirements are fulfilled, and work together to identify ways that the City can support your project. This may also be a good time to meet with the local city councillor to present the project vision and gain their support. Keeping the City and local councilors abreast of your plans will be important, especially if a City council vote is required for the project to move forward.

2. Draft capital and operating budgets to assess preliminary feasibility

A key part of determining a project's viability is assessing its financial feasibility through the development of a **pro forma analysis**. You will likely want to work with your development consultant to guide you through this process. You may also need to engage a construction manager or quantity surveyor to assist in providing costing for the construction hard costs of the project.

At this stage, the pro forma will be developed based on a set of **preliminary assumptions** around the sources and uses of funds. These assumptions will change as the project details are refined and as the team gains greater clarity on the project requirements. This ongoing refinement enables continued feasibility checks leading up to the point of construction.

A detailed financial analysis will be required to secure project funding (both pre-development funding and construction funding), and should include:

- All soft and hard development costs (e.g. land purchase, design and consultant costs, construction/ renovation costs, fees and permits, financing costs, marketing and lease up costs, taxes, contingencies, etc.)
- All equity, grant and financing contributions (e.g. donated land, cash and in-kind contributions, waivers of taxes or fees, government subsidies and grants, loans, etc.)
- Sources of potential revenue during operations (e.g. rent, subsidies, parking fees, etc.)
- Ongoing operating and financing expenses (e.g. insurance, property tax, service and programming costs, maintenance costs, loan repayment, etc.)



Helpful Resources: If you are interested in learning more about pro forma statements, review these helpful resources:

- InDwell's [Making Affordable Housing](#) book includes a sample pro forma in the Appendix.
- The Rural Development Network's [Step-by-Step Guide to Developing Affordable Housing](#) also includes a helpful proforma section.
- Evergreen's [Ontario Affordable Housing Calculator](#) tool is designed to support emerging affordable housing developments.

If your organization is leading the project development, you will also want to discuss your **financial contribution**. In addition to providing land and/or capacity to move this project forward, will you make an equity contribution and do you understand the approvals process within your organization to be able to make this commitment?

Once your initial pro forma is complete, you should be well positioned to apply for early stage pre-development grants or loans. As you refine the analysis further, you will want to initiate conversations with funders and lenders. Ensuring you can secure project financing will be key to moving forward.



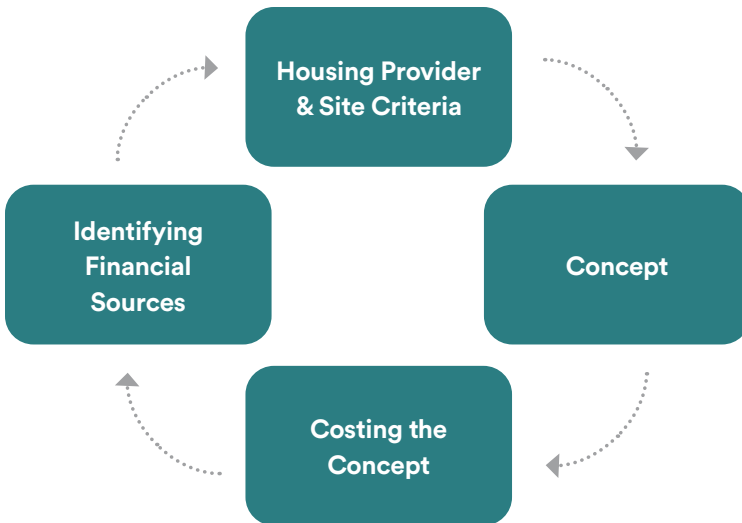
Helpful Resources: This summary of [Sources of Funding for the Development of Affordable Housing](#) is a helpful starting point.

4. Revisit the design concept and budgets as needed to ensure a feasible project

Project pro formas rarely “pencil out” on the first go. The preliminary feasibility assessment in step 3 above might reveal a budget shortfall, which will then require you to consider changes to the design, additional potential funding and equity sources, changes to the proposed rent structure, etc. Assessing

the feasibility of a project is a dynamic exercise that requires continued iteration as you learn new information, and the project design is refined. Your project team can assist in navigating this process.

Figure 2: The Feasibility Cycle



Source: Cahdco

5. Land the vision and make a case for moving forward

As the feasibility of the project is assessed, decisions are made and new information comes to light, the overall project concept will continue to be refined. Once you landed on a single **preferred and feasible concept**, it is time to draft a business case to move forward. This document should contain an accurate summary of all discovered information and present a convincing narrative and vision for the project. You will use this document to introduce the project to funders, governing bodies, partners, and other key stakeholders. You will also use this document to seek approval from your organization to move forward with the specific project.

Before moving to Stage 4, you will need to land on a feasible project that your organization, project team, project partners, and other key stakeholders can agree on and are excited to move forward with.

STAGE 4

DEVELOP DESIGN AND EXPERIENCE



Although presented as linear, these steps are highly iterative and will take place concurrently. You will continue to revisit each step as you learn more throughout the project until you land on a firm vision and plan for moving forward.

1. Secure the land (if you do not already own it)

A key step in this stage is to secure the land for the project, either through a **purchase and sale agreement or a lease agreement**. Funders and lenders will want to ensure that the site is secured before finalizing any funding agreements.

If you do not already own the land that you plan to build on, you will now need to work with the land owner and/or a real estate agent to secure the site. If you own the land that the project will be built on, but you are partnering with a housing provider organization to own and operate the project, you may want to include requirements in the purchase or lease agreement that ensure the future use of the land for social purposes.

Regardless of the partnership model that has been agreed to, if a land transaction is required, then project partners will now need to agree on the key terms:

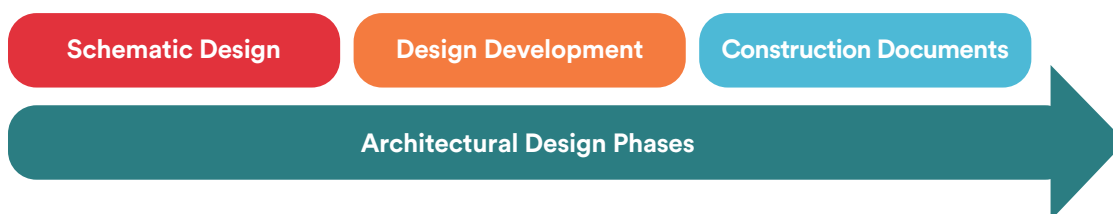
- Who will own the land moving forward?
- What will the sale or lease price be?
- What approvals will be required in order to move forward?
- What role will each organization have moving forward?
- What timelines are you working towards?
- When will the transaction take place?

2. Refine and finalize architectural design

Now is the time to **incorporate any additional changes** into the design, as the plans are refined and feedback from project partners and stakeholders is incorporated. Circle back with the project governance team to secure approval of the updated architectural design and site plan.

The project design/architectural team will **finalize the architectural plans and specifications**, taking into consideration site requirements and priorities, zoning regulations, building code, and any important design principles that have been established. Once the project team begins to prepare the **contract documents** for the design—which will be used for the building permit, tender and construction—changes should be very minimal, as they become costly and time-consuming once the project design is at this point.

Figure 3: Phases of Project Design



Construction documents are drafted when the project team is comfortable moving forward with the architectural design and no further changes are expected. The documents include all of the specifications required for construction. Once these documents are complete, they are sent to construction teams and contractors for pricing or bidding. Drawings are also sent to the municipality's building department for building permit approvals.

The construction documents often are a complete set of architectural drawings (site plan, floor plans, sections, elevations, and details) that are then combined with structural, mechanical, and electrical drawings. All together, there is enough detail here for the municipality to approve your project and for the contractor to build your project.

3. Create partnership agreements

By this point, you will already have identified a range of project partners that will be involved in the development and operation of the building (e.g. housing providers, property managers, service providers). You may have also already established memorandums of understanding with these organizations to align on the key parameters of your relationship. Now is the time to **formalize these partnerships** by entering into legal agreements.

To do this, you will need to **iron out the specifics of an operating model based** on the site uses and tenant experience you plan to deliver. As you get into the details, you will also need to refine your projections of the building's operating costs.

For example, if you plan to partner with a housing provider, your agreement will need to speak to the type and number of units of housing being delivered, the duration of the operation, and clearly identify roles and responsibilities for each organization. If you hope to offer regular tenant programming, you will need to determine who will deliver the programs and what the associated costs might be. Will a community organization need to rent space in the building or will space be provided free of charge? Will tenants need to pay to attend programs? Who will cover the cost of staff, supplies, etc.?

If you hope to offer publicly funded health care services to tenants as part of the housing model (eg. care navigation, support with activities of daily living, medication management, wound care, etc.), you will want to work with your local health authority to determine how these services might be delivered and funded. It will be important to identify the staff that will be required, who will employ them, how costs will be covered and how you might help to improve care delivery efficiency. For example, pooled funding models have been proposed and tested in some parts of the country whereby a home care provider receives all of the funding for any eligible tenants and then pools this funding in order to deliver services to tenants in the building; this can often be a more efficient and effective way to deliver services.

Once you finalize all of these key details, you will be ready to **execute operating contracts** that outline respective roles and responsibilities, the cost of services, the length of the operating term, evaluation and accountability criteria, etc.

4. Secure project funding and financing

You may have already secured funding to support your pre-development work but now you will need to **secure the funds required** to complete the project. You should have a high degree of certainty regarding your funding/financing sources, and ideally project funding/financing should be confirmed, before development begins.

With the assistance of your development consultant, who has expertise in affordable housing programs, prepare and submit your requests for funding/financing and engage funders. Your plans for the project may need to evolve to meet a range of funding requirements, so knowing what programs you plan to apply for early on in the design process will be beneficial. Many funders will attach conditions in the form of key performance indicators and targets with regard to your project. Make sure you work with your project team to plan for these targets.



Helpful Resources: This summary of [Sources of Funding for the Development of Affordable Housing](#) is a helpful starting point.

If your organization plans on making an **equity contribution** to the project, now is the time to revisit and confirm this commitment. Some organizations will need to launch significant fundraising campaigns to meet their commitments and will need sufficient lead time to raise enough capital to satisfy lenders that there will be a reliable equity contribution to the project.

5. Finalize capital and operating budgets

You have worked hard to refine all of the project details and now need to **incorporate any new information** into your pro forma analysis. For instance, during the design development in this stage, you will receive updated costing on the anticipated construction costs for the project. Based on community feedback, you may now be planning for more or fewer parking spaces or other adjustments. You may have signed an agreement with a property manager and now can adjust your operating costs to reflect that agreement. All of these will change your project capital costs. This ongoing refinement enables continued viability checks leading up to the point of construction.

You will also adjust your pro forma based on your success in securing a range of different funding and financing sources. If your project lacks the funds to proceed with construction or ongoing operations, you will need to review the viability of the project.

6. Obtain municipal approvals

The municipality should already be aware of your project plans as you have been in touch with their planning office, as well as the local councillor. Now, with the assistance of your project team, you will need to **get approval** from the local municipality for your project to move forward.

There are a wide range of **planning approvals** that may be required for your project, which will depend on your local municipality. These may include a zoning amendment or variance, a site severance, and/or site plan approval. Your project team will help to navigate these processes. Depending on the approvals required for your project, you may want to consider engaging a professional planning consultant to manage the planning applications process.

You will also require a **building permit** from your local municipality before construction can begin. Your architect will coordinate this process with your project team. The building permit submission usually takes place later in the planning approvals process, once you have comfort that the municipality is on board with your proposed plans for the site. The planning and building permit approval processes often wrap up concurrently at the end of the approvals process.

7. Work with the project team to undertake construction tender

If you have not already engaged a construction manager as part of your project team, you may want to do so in this stage to **manage the tender process and construction**. The construction manager will work closely with the rest of your project team to review the finalized architectural design and all permits associated with your development. With this information, the construction manager can develop a project construction timeline, so expectations are established and can be communicated to the project team and project partners.

The construction manager is also responsible for the hiring of sub-contractors for construction through the tender process, during which they seek competitive bids for the labour and materials to build the project, and make recommendations to the client. The tender results will inform the project capital budget finalization noted in the step above, as you will have the real, competitive market price for building the project. The tendered budget will also be used to form your contract with the construction manager for the construction stage.

STAGE 5

BUILD THE PROJECT



Although presented as linear, these steps are highly iterative and will take place concurrently. You will continue to revisit each step as you learn more throughout the project until you land on a firm vision and plan for moving forward.

1. Construction administration

Construction administration consists of coordination between all design and engineering consultants, the general contractor, and all other sub-contractors. Construction administration is focused on **adherence to the construction documents** and managing any changes that arise.

The construction manager typically coordinates all of the sub-contractors, and hosts regular site meetings with the project team. The architect is typically the Prime Consultant, and often oversees the contract administration (along with their sub-consultants) through regular site visits and reports, review of changes and associated costs/savings, review of shop drawings, clarifications on the design through response to requests for information, review and certification of the contractor's monthly progress billings.

Before any construction begins, you will need to decide who has the **authority to make decisions** as changes arise during the construction process. Often decisions must be made on-site quickly and the appropriate accountability needs to be in place. Perhaps a certain product has been discontinued, poor soil is discovered, pipes need rerouting, or the municipal building inspector requires a change to sign off on the project. Determine who has the authority to make (or delegate) these decisions, and how these decisions should be documented. This could be a member of your organization, a project partner (i.e., the housing provider), or an appointed member of your project team.

Some changes during construction can be client-directed. You may decide to add or adjust features of the design; simple items like a security camera or park bench, or more costly things like a different lighting system. Scope creep is always a risk, so be prepared for its financial implications and have a solid decision making framework in place to make these decisions along the way.

Project timelines often go longer than originally scheduled for a variety of reasons. This may be caused by unexpected inclement weather, optimistic time estimates, changes in scope, challenges with materials supply, etc. Determine who is responsible for monitoring and reporting back on the project timelines. Changes to the project schedule may affect the project scope and budget.

2. Coordinate funding and financing draws

Typically, during construction, payment is made to the contractor as work is completed on a monthly basis. Often it is the architect, as Prime Consultant, that will certify the construction manager's (i.e., contractor's) application for **progress payments**, to ensure the amount being invoiced in a given month corresponds appropriately to the work done on site. In addition, most lenders and some funders require that groups engage a **quantity surveyor** consultant, to provide third-party project monitoring services for each draw request. The quantity surveyor/project monitor, with information from the project team, tracks the project's finances and progress, to ensure everything is completed according to requirements and standards. Lenders and funders often require this consultant to issue a comprehensive report at each draw request to validate that the amount is appropriate given the work completed on site and the funds received for the project to date. The quantity surveyor/project monitor also evaluates and notes any potential risks for the funders and lenders.

At the outset of project construction, your project team can help to develop a draw schedule, which is a detailed payment plan for a construction project based on projected monthly expenses. If a bank or external funder is helping finance or fund the project, the draw schedule gives the bank/external funder a sense of when, and in what amount, you will require the funds to be disbursed to pay for the costs of the project. The setting of a draw schedule is negotiated between the project proponent and the funder/bank, with feedback from the project team. Coordination with the team and funder/lender to ensure a smooth draw and payment process will help to avoid liens on the project, where a builder, sub-contractor or supplier can file a lien if their company has done work and/or provided materials on a job site and have not been paid.

Communication with Funders and Lenders

During construction, funders/lenders will likely ask for updates on construction progress and timelines. The exact metrics to be reported, as well as the frequency of these reports, will be provided in the funding agreement. Ensure that your project team, including your quantity surveyor/project monitor, is preparing these reports as required.

3. Complete construction and obtain municipal occupancy permit

When you approach the **completion of construction** for your project, your project team will assist in applying for a municipal **occupancy permit**. This permit is evidence that the building complies with the building permit that was originally granted for your project.

Part of construction administration includes submitting reports before the occupancy inspection to indicate fulfillment of work relating to areas of the building to be occupied. If the inspection passes, you will be able to obtain an occupancy permit. Your project team may need to consult with other inspection agencies as well, such as fire services or the electrical safety authority.

Depending on your project size, scale, or mix of uses, you may wish to request a partial occupancy permit to allow a portion of the building to be occupied, while you continue construction completion on the rest of the project.

Commercial spaces, such as child care centres, salons, and other new businesses, will need to arrange for a business licence after they have received their occupancy permit.

4. Market the project and begin lease-up preparations

Depending on the specific uses in your project, you might need to undertake marketing of some or all of the units/spaces.

Establish any **criteria for resident eligibility** (e.g. income levels, health status, age, etc.), and set the monthly rents and any other costs associated with programs and services. Be mindful that these criteria should reflect any commitments you have made to your project partners and key stakeholders, and should also align with your project vision and mission.

Approximately six to eight months in advance of construction completion, your project team should begin to create a marketing plan to **identify and attract residential tenants**. If you are looking for commercial tenants, this work will likely begin even earlier. You may want to think about creating a website with information about the project, eligibility requirements, and the option for prospective tenants to inform you of their interest in a unit/space. There are a variety of other channels that may be helpful in identifying prospective tenants (both at initial lease-up and on an ongoing basis) including:

- Advertising through local newspapers,
- Reaching out to referral agencies who can contact people on the wait lists for similar housing (e.g. centralized municipal waitlist or wait lists for specific projects/providers),
- Sharing information about the project with local community organizations who work with older adults,
- Following up directly with people who participated in the community outreach and engagement efforts you completed in earlier stages of work.

At this stage, you will also want to work with your **property manager** partner, if you are not undertaking the property management yourself, to begin preparing for rent-up of the units in the new project. You may enlist the services of a residential or commercial **leasing agent** to help you with showing and leasing the units. Often, property management groups provide these services, in addition to looking after maintenance, repairs and cleaning functions.

If you plan to have a **tenant on-boarding process** you will want to put that in place. For example, you may want to offer move-in assistance, host a meet-and-greet for new tenants, establish a tenant buddy system, complete tenant health assessments or collect emergency contact details from tenants.

Ideally, by the time the construction phase is completed, your new housing development will be fully rented. Beyond the initial lease up efforts, effectively **managing vacancies** is key to the financial viability of a non-profit housing development. Remember that if units are left unoccupied, overall rental income declines. You will want to maintain a wait list for units so you can contact prospective tenants as units become vacant.

5. Work with the project team to address deficiencies

As part of the construction wrap up process, the project architect will work with the construction manager to perform **deficiency reviews**. Deficiencies could include scratches to finishes, imperfections in paint, issues with lighting or door swings, among many other possible items. Even a small construction defect or deficiency can be meaningful.

Through the process of construction administration, as defects or deficiencies are identified, they are documented by the team along with recommendations for their **correction**. Your architect will maintain an inventory of all deficiencies, and work with the construction manager/contractor to take appropriate action for their correction with corresponding due dates.

6

STAGE 6

ONGOING OPERATIONS

1. Complete lease-up

By this time, your team, including the property manager, will have created the first set of **lease agreements** for incoming residents. This will continue until all units in the project are leased.

Information packages should be sent out to residents welcoming them to their new home, as well as outlining fire and safety procedures, how to use building amenities such as parking and laundry, and any additional information regarding building operations (maintenance requests, waste disposal, support services and programming, etc.). You will also want to share information regarding collection of rent, late payment or non-payment of rent, use of common areas, or emergency preparation.

Finally, you may also want to set out expectations around the kind of support you may or may not be able to offer tenants as their health needs change and get permission to contact friends or family if you are concerned about their well-being or if there is an emergency.

2. Coordinate with the project team during the one-year warranty period

Construction contracts typically include a **one-year general warranty period**. The warranties will generally apply to certain defects in work, mechanical systems and materials for a period after partial or full occupancy. During the first year in operation, the project team (in particular the architect and construction manager/contractor) should be advised of any warranty items or deficiencies that may arise. Establish an inspection plan for the building with your property manager and project team, and set a warranty walk through on site shortly before the one-year warranty period lapses to ensure any potential warranty items are identified within the one-year period and can be addressed accordingly. This will contribute to keeping your costs for repairs and maintenance as low as possible.

3. Ongoing property management

Ongoing **property management** is important to ensuring the smooth operation of your project. Work with the property manager to create a building and site maintenance plan, to establish service standards for the property, and to put in place a risk-management strategy.

Some of the items that will need to be regularly maintained include, indoor common areas, outdoor landscaping and snow removal, in-unit repairs (e.g., plumbing, electrical, drywall, paint), unit turnovers (which can include cleaning, painting, etc.), and building mechanical systems (heating and ventilation, boilers, elevators, etc.).

If you are housing at-risk or vulnerable populations such as older adults, consider offering building staff additional training around working with this population. For example, can maintenance staff be on the

lookout for fall hazards, or is there a process for them to report concerns they may have about tenants' well-being to building management?

Types of Services a Property Manager Might Perform in a Multi-Unit Residential Building

- Maintaining security for residents and building assets
- Asset management (mechanical services, etc.)
- Building management control systems
- Maintenance planning (equipment, etc.)
- Building repairs, cleaning, and general maintenance
- Gardening and grounds maintenance
- Upholding a building's identity and values
- Maintaining by-laws and regulatory compliance
- Record-keeping (legal requirements, monitoring, etc.)
- Preparation of operating budgets
- Responding to grievances and feedback
- Undertaking larger capital or maintenance projects
- Essential services provision (fire extinguisher, etc.)
- Waste management
- Energy and water management (lighting use, etc.)
- Concierge services
- Mail and package management

4. Coordinate programming and services

Bringing additional tenant **programs and services** into a building, or supporting residents to self-organize and lead programs for their neighbours, can help to extend older adults' independence and maintain their health and overall well-being.

Providing tenants with programming and services often involves a high degree of coordination and **collaboration with partner organizations**. It may also require bringing on a **community manager** to help coordinate these efforts, oversee events, encourage tenant participation, etc. Any costs associated with programming and services must be covered either through philanthropic sources, public sources or through private pay (e.g. bundled into monthly rent payments, charged per event/service, etc.).

You will want to establish mechanisms for tenants to provide regular feedback, influence decisions around which programs and services they wish to see in the building and even lead new initiatives. Consider conducting regular tenant surveys, hosting tenant meetings and/or establishing a tenant advisory council. Based on tenant feedback, you may modify certain services and programming so that they better reflect the needs and wants of the local community.

You may also be able to find ways for interested residents to get involved in the property's upkeep and management. For example, are there tenants who might like to maintain the garden, staff a welcome desk or act as a tenant liaison?



Helpful Resource: The [resource collection](#) prepared by the [Hey Neighbour Collective](#) is a helpful source of research and reports on the topic of tenant engagement and community building. Hey Neighbour Collective's work focuses on building community, social connectedness and resilience in multi-unit housing communities to enhance health and well-being.

5. Manage the operating budget

Annual operating budgets track **revenues and expenses** for the housing development, and cover everything from building administrative costs to general maintenance of the building and site. Property managers would typically prepare the building's annual operating budget to share with the owner and housing provider.

Consistently operating a housing development on a reactive or "unplanned" basis is not ideal. Only fixing things once broken can cause unexpected financial burdens. An **annual reserve** should be established to help cover unanticipated expenses and to account for anticipated investments required to make upgrades or replace items that have reached their lifespan (e.g., roof replacement). Planning and estimating maintenance costs is an important form of risk management.

6. Review performance

Your organization initially became involved in this work to have a **meaningful impact** on the health and well-being of older adults in the community. To **measure and report back** on the type of impact the project is having, you may want to establish an evaluation framework and key metrics to measure against year over year. For example, have you positively influenced tenants' feelings of well-being, their feelings of connectedness or their sense of independence? Has the project reduced demand for more expensive healthcare services or settings?

Conducting a regular **tenant survey** can be a good way to collect evidence of the project's impact. Consider not only quantitative impact measurement but also qualitative accounts. Can you capture tenant stories so others can better understand the impact your project has had on the people who live there?

Working directly with an academic institution to support a formal evaluation of the impact of a project can also be a helpful exercise. For example, the [Oasis Senior Supportive Living Inc.](#) program is designed to strengthen and sustain healthy communities of older adults by addressing important determinants of healthy aging such as isolation, nutrition, physical fitness, and sense of purpose. Oasis partnered with researchers at Queen's University, Western University and McMaster University to expand and evaluate Oasis in four cities across Ontario.

Ongoing Community Relations and Outreach

Affordable housing and associated services for low- and moderate-income individuals and households can be met with local opposition. Even if you engaged in a thorough public consultation process from start to finish, and even if your project is well designed and nicely finished, this can still occur.

While it's important to engage in discussions with the community leading up to the approvals and construction of your project, it's equally important to manage these relationships after occupancy. Building community support will depend on nurturing positive relationships with adjacent landowners, residents, community organizations and businesses. This will be an important marker of success.

If you have a mixed-income or a mixed-use development, a positive image and reputation in the community will enhance your ability to attract and retain market-priced units and commercial tenants.

7. Report to funders and lenders

Make time for a post-implementation review nearly six months after completion of the project. This review is intended to evaluate project success, key project achievements and milestones, and any lessons that can be applied to future projects.

The requirements for reporting to your funders and lenders may continue during operations, and will likely include sharing financial statements, operating budgets, cost analysis, and other metrics that demonstrate financial feasibility. Reporting requirements may also cover impact related metrics such as those identified in the previous step. Reporting requirements are typically set out in the contribution agreement with the funders and lenders, including how long reporting must continue and how frequent the reporting must be. This will be highly dependent on the exact criteria the funder and lenders require.