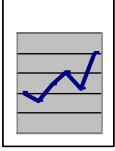


clare mcwilliams
consultant

138-60 royal oak plaza NW
calgary, alberta T3G 0H7
p. (403) 809 2826 | f. (403) 210 1631
e. cmcwilliams@telus.net



E. Huculak Consulting Services
3 Johnson Place SW
Calgary Alberta
T3E 7S2
Cell (403) 630-7780

Affordable Housing Initiative: Affordable Housing Facilitator program Status Report



Completed for: Alberta Real Estate Foundation
Completed by: Bloom Communications Consulting
Edited by: E. Huculak Consulting Services

September 27, 2007

TABLE OF CONTENTS

REPORT	
EXECUTIVE SUMMARY	3
OBJECTIVES	5
SCOPE	5
APPROACH	5
DETAILED OBSERVATIONS	6
RECOMMENDATIONS	9
APPENDIX	11
APPENDIX I: Interview Content	12
Brooks Housing Society, Prairie Village	14
Cochrane Society of Housing Options, The Homestead	15
Edmonton City Centre Church Corporation (ECCCC) Golden Nugget	16
ECCCC, The Fortress	17
ECCCC, The Big Breakfast House	18
City of Camrose Affordable Housing Project, Sparling Manor & The Bethany Group	19
Calgary Community Land Trust (CCLT)	21
Calgary Habitat for Humanity & CCLT	22
City of Cold Lake	22
Bonnyville Affordable Housing Association	23
Wood Buffalo Housing and Development Corporation, Venture Terrace	24
Handicapped Housing Society of Alberta	25
Grand Prairie Residential Society, Margaret Edgson Manor	27
Social Housing and Action Committee (Lethbridge)	28
The Lacombe Foundation, Affordable Housing Complex	29
City of Leduc, Willow Park Affordable Housing Project	30
Panoka Champion's Centre	31
Drumheller HOME Program	33
Medicine Hat Community Housing Society, Transitional Housing	35
Step One Housing, Glendale Manor	36
Edmonton Housing Forum, Affordable Home Ownership Program	37
Edmonton Housing Forum, Revolving Down Payment Fund	37
APPENDIX II: Projects Confirmed by Internet or Facilitator	38
ECCCC, Our Place	38
ECCCC	38
Pre-Fabricated Condo	38
ECCCC, Transitional Housing Project	38
St. Paul Affordable Community Housing	39
APPENDIX III: Projects Unable to Contact or Collect Information	40
Vilna Project	40
Red Deer Housing Committee	40
APPENDIX IV: Glossary of Acronyms	41
APPENDIX V: Spin-Off Projects– Explanation	42

EXECUTIVE SUMMARY

The Alberta Real Estate Association (AREA) launched its Affordable Housing Initiative (AHI) in October 2000 funded by a \$59,500 grant from the Alberta Real Estate Foundation (AREF). The program was designed to create affordable housing projects by pairing REALTORS® with non-profit organizations and various community groups. The Affordable Housing Initiative was directed by AREA and coordinated by hired Affordable Housing Facilitators, Anna Bubel and Brenda Naylor. Their main objectives were the following: to help the realty boards and their member REALTORS® generate interest in affordable housing projects; and to provide assistance in the initial planning and development stages.

A second grant of \$110,000, funded by the Alberta Real Estate Foundation, extended the AHI Affordable Housing Facilitator's program by an additional 18 months.

Due to delays experienced by several of the projects, it took almost 24 months to complete this phase of the AHI. Throughout the timeframe, the Housing Facilitator was available to give support to projects already initiated or being considered by communities, as long as a REALTOR® was involved in the local organizing group.

Twenty-nine projects were initiated or completed during this timeframe with varying degrees of facilitator and REALTOR® involvement. By the end of April 2003, these projects were either completed, underway or on hold. Included in this total was the creation of the HOME Program, Calgary Community Land Trust and the Alberta Housing Coalition, to whom the AHI Housing Facilitator was integral to their inception.

Between October 2000 and April 2003, the total AHI Housing Facilitator program totalled \$133,950; funded by AREF and managed by AREA.

This analytical report represents the status, content and findings resulting from work completed by the Affordable Housing Facilitators program, *Affordable Housing Initiative* (2000-2003).

It presents the current status of the twenty-nine projects and initiatives involving the direct or indirect support of both Facilitators for the duration of this program.

Project status was generated by telephone interviews conducted by the consultant, which revealed a **79% success rate**. Of the original 29 projects, 23 projects were completed or are underway, 3 projects did not proceed, and 2 projects were unable to be contacted therefore discounted from calculations contained in this report. Projects that have transpired since the completion of the Housing Facilitator program ("spin-offs") total 44, equating to **191% growth** on initial investment (see APPENDIX V).

The consultant's approach involved three phases:

1. Reviewing background material and program files provided by AREA
2. Interviewing project proponents
3. Interviewing the REALTOR(S)® involved with proponent's project

In summary, it was found the facilitators played a key role in coordinating local housing opportunities by engaging the appropriate community players like REALTORS®, non-profit organizations, housing professionals and local government. The depth and extent of facilitator involvement was largely determined by the capacity of the respective group. For experienced, higher functioning groups, the facilitator's role was generally more administrative in chairing meetings, assigning duties and

deadlines. The facilitator largely served to expedite project phases. These particular groups were located in the larger or more progressive centres like Edmonton, Calgary, Red Deer, Lethbridge, Medicine Hat, Fort McMurray, Leduc, Brooks, Drumheller and Cochrane.

For smaller communities with significantly less experience and background, the facilitator’s role was generally more involved and ultimately more profound in communities like in Camrose, Bonnyville, Cold Lake, Grande Prairie, Panoka, Strathmore and Lacombe. A distinct need remains in these smaller communities for planning and development assistance for affordable housing projects.

Further, this report’s findings and observations suggest that AREF has the opportunity to position itself as a leader in affordable housing initiatives may consider two avenues to achieve this.

With the evident success of the AHI Housing Facilitator program, AREF is in a strong position to advocate project planning and development assistance for low-capacity proponents and small-centre municipalities. AREF can pursue this initiative in one of two ways: by re-launching the AHI Housing Facilitator program *or* by lobbying municipal and federal government action. It would be most advantageous for AREF to share its findings with community development professionals whose mandate is to address gaps in affordable housing. Through information sharing, municipal and federal housing professionals will gain access to the ‘best practices’ learned from the AHI Housing Facilitator program to consider and replicate in future projects throughout Alberta.

Secondly, AREF is in a unique position to address the gaps that also exist when acquiring “how-to” affordable housing information. Findings and observations in this report determined that both new and experienced housing champions had difficulty locating the following resources: sources for capital and operational funding; a repository of province-wide consultants whose services can assist in a project’s development continuum; and a comprehensive list of local affordable housing projects to leverage experience and information from.

By developing and marketing public access to such information through AREF’s website or office, AREF could support the orchestration of subsequent affordable housing projects throughout the province at minimal operational capacity and expenditure.

Figure 1

AHI Results	
Core AHI projects:	29
Completed projects: <i>Includes initiatives, projects occupied & underway</i>	23
Spin-off projects (post-April 2003): <i>Includes both projects & initiatives, completed or in planning process</i>	44
‘Dead’ projects: <i>No progress made post-April 2003</i>	3
MIA <i>Unable to obtain status</i>	2

OBJECTIVES

The main purpose of this report is to provide the Alberta Real Estate Foundation (AREF) and the Alberta Real Estate Association (AREA) with an update on how and/or if the AHI projects have grown and developed by determining:

1. Current status of AHI projects (October 2000-April 2003);
2. Existence and status of resulting 'spin off' projects (post-April 2003); and
3. Political impact on such projects (if any)

SCOPE

This report covers the examination of 29 projects named in *Affordable Housing Initiative AREA Project #2001-27 Final Report, Appendix D: Summary of Work on the Affordable Housing Initiative 2000-2003*) and AREA's Winter 2003-2004 publication, *Affordable Housing Initiative REALTORS® – Opening Doors to Better Futures*.

Information collected through an interview process is subjective and generally open to the interviewee's interpretation and recollections. The consultant cannot guarantee the credibility or accuracy of the content collected. All observations and recommendations are based on hearsay, thus removing any responsibility of misrepresentation from the consultant.

APPROACH

The approach for this report included the following steps:

1. Review documentation of the projects and contacts identified by the Affordable Housing facilitators
2. Contact the community project proponents to determine the status of the projects.
 - a. What measurable results were achieved?
 - b. What worked and what did not work?
 - c. Identify what additional barriers that might have been encountered.
 - d. How did the facilitators assist the process?
 - e. Did the program benefit certain size or location of communities?
 - f. Have funding mechanisms changed?
 - g. How have connections with REALTORS® helped?
3. Interview REALTORS® who were involved with the Housing Facilitators to further assess results and solicit additional ideas

DETAILED OBSERVATIONS

These are general observations that permeate through the majority of projects, with excerpts from interview content to support observations.

Facilitator's skill sets (what they could perform well) to improve the 'bottom line':

- Experience in a coordination role "Most significantly, the facilitator helped to move the project along mainly in a coordinator role, chairing meetings, pooling resources, allocating jobs and timelines." Bob Hawgood, REALTOR®/Manager Sutton Group. Granville Place, Edmonton;
- Ability to lay the groundwork by providing a "process" from inception to grand opening but making the group do the work;
- Industry-specific networking enabled the facilitator to bring the right stakeholders to the table when needed (REALTORS®, developers, construction companies, non-profit partners, local housing authorities, architects, appraisers, community needs assessors, government);
- Ability to negotiate fees with stakeholders reduced or waived stakeholders fees to minimize cost;
- Understanding of funding sources and application nuances, largely ensured funding success and expedited process;
- Ability to forecast budgets based on various funding scenarios;
- Understanding of municipal zoning (combining residential and commercial space);
- Experience in forming housing authorities, societies and trusts where beneficial;
- Ability to recognize where the use of a Needs Assessment will add value and credibility for a community;

Impact of facilitator's personality type on their effectiveness and credibility

More important to their technical knowledge, was possessing the ability to pull people together, to excite and unite community towards a single goal and to continue to motivate proponents through empowerment.

"This project would most certainly not exist without passionate AHI facilitator involvement [...] we are proud of the clients we are serving." Mayor Don Weissback, City of Brooks.

Value-Add for rural communities/smaller municipal centres:

Many smaller communities like Camrose, Bonnyville, Cold Lake, Grande Prairie, Panoka, Strathmore and Lacombe have learned a great deal and attribute their project's success to the facilitators, if not by workload, by "planting the seed" in their communities.

For instance, though Cochrane has acquired the necessary knowledge and resources to proceed with like projects on their own, a similar AHI facilitator role would be of benefit in other small municipalities. The Cochrane Society of Housing Options receives, on average, two calls per month from smaller communities seeking guidance regarding the creation of local affordable housing options in their area. These groups are referred to AREF.

Smaller communities said that they would like to be able to assist others, but their capacity is so limited (largely because their own programs are managed and run by volunteers) they do not have the time to commit.

Rural communities/ smaller municipal centres identified as having need of technical assistance:

Wetaskiwin, Drumheller, Olds, Irricana

"I continue to be shocked that some rural communities are still starting from scratch [with regards to affordable housing]." Corinne Burns, Previous Tennant Manager (2001). Homestead, Cochrane.

Larger centre's capacity to effectively manage affordable housing initiatives

Though corporations like ECCCC are more than equipped to create affordable housing in the Edmonton area, they acknowledged that smaller agencies have limited in-house expertise.

Current facilities in larger centres address homelessness and affordable housing in the community indicated by 100% occupancy rates and waiting lists for such projects, however, these indicators also suggest need for additional affordable housing options within the community, which ECCCC continues to address.

On various projects, the facilitator was heavily involved in zoning and building design as well as securing development permits.

In some cases, the facilitator's involvement was limited to pairing a local REALTOR® to a project, as was the case the Big Breakfast House in Edmonton. The group's capacity in this case was high enough that her role was limited to this task.

A successful project's ability to shift and minimize NIMBY tendencies

The most consistent barrier for projects was community resistance (NIMBY), which slowed the approval processes with the municipalities in Cochrane, Panoka and Lacombe. Due to the subsequent success of these projects like *Homestead* in Cochrane, the community has been "broken in" and therefore open and supportive to future projects.

There is good business sense in philanthropy

Positive PR most certainly did result from an Edmonton REALTOR®'s involvement with the Golden Nugget Suites project, acquiring numerous clients in both the private and non-profit sectors. This REALTOR® has been able to attribute over six figures to his volunteer endeavours, from spin-off business. *(At the request of the REALTOR®, his name or the exact figure cannot be noted in this report.)*

ECCCC recognizes the value in broader community participation by REALTORS® with the purest notion of realty being their business. They also value the partnership with local REALTORS® and real estate boards. By leveraging REALTOR® knowledge of the housing market, they are able to be more innovative in their project conceptualization.

One proponent commented that the facilitator was able to engage the appropriate REALTORS® whose values and priorities were in keeping with giving back to the community. A mechanism is needed to engage other REALTORS® to the cause.

"Real estate has been good for me [...] everyone has their own passion. Affordable housing is mine [...] REALTORS® know housing, perhaps not the social issues. Real estate is housing; affordable housing is the hottest topic. Perfect fit." Dale Bowel, Agent REMAX & President, Rose City Residential Society.

Though in most cases, REALTORS® have not calculated fiscal return on their volunteer involvement, most can acknowledge that public recognition has helped to pad their reputations, which in small centres, is crucial to success.

Small and large community's inability to leverage a source site for 'best practises'

It was conveyed that contact information for other successful affordable housing projects is not readily available. Valuable information has been exchanged with the creation and development process of a new project, that some proponents have acknowledged that they would like to share what they've learned with new proponents.

Ease and ability to locate capital and operational funding programs

With federal programs and ministries changing so frequently, it is difficult for new proponents and experienced housing professionals to easily locate current funding sources and grants. This is often a very time consuming process to track these sources down, not to mention once applications have been submitted (incorrectly), they can delay a project's construction time significantly. (One proponent waited 3 years.)

There are funds like the Rural Opportunities Fund (Elk Island Park) whose annual budget is \$100,000,000 for the purpose of operational funding. A number of housing authorities and proponents are not aware of what funding is available to them. New and experienced societies are aware of the sources, which they previously used but have expressed that they would not know where to look. A few have said they would solicit one of the Housing Facilitators for assistance.

Proponent's ability to locate adequate operational funding has compromised the project's size and existence, in some cases.

For the Fortress, a ECCCC project in Edmonton, the society's objective to create an affordable housing complex was achieved, however, operational funding was terminated limiting the number of units they were able to occupy. The opening of the remaining four units is currently under negotiation.

"The society at this time is pressed to capacity and is not in a position to take on additional projects having predominately volunteer staff. As such, fewer projects have come to fruition than estimated." Pat Clay, One Step Society, Strathmore.

REALTOR®, Louise Johnson, was involved in an 8-unit assisted living, low-income seniors project for over four years on a volunteer basis. Due to lack of local interest, issues with the municipality, and loss in her own income (resulting from volunteer time invested in this project), she was forced to remove herself from the community team. Nothing further has happened with this project. (REALTOR®, Cold Lake, project yet to be determined)

Municipal engagement can have the largest political impact on attaining capital and operational funding.

As noted above, lacking municipal engagement and priority has allowed an unnamed affordable housing project in Cold Lake to be postponed for 5 years. New staff following the municipal election brought all progress made back to square one, as new comers had not been involved with initial planning and have prioritized other local initiatives accordingly. The project is currently sitting with Family Community Social Services.

Conversely, the acquisition of commercial land in Bonnyville and area had become too expensive. BAHA is reliant on recreation land donated by the Town (Bonnyville Affordable Housing Project).

Relationships with politicians at all three-levels of government often expedited issues with funding applications, NIMBY and lobbying.

Figure 2

Return on Investment & Interesting Figures	
Number of AHI projects (2000-2003)	29
Number of Completed AHI projects	23
Number of spin-off projects (post April 2003)	44
Growth Percentage	<u>191%</u>
Total cost of AHI Housing Facilitator program	\$133,951.40
Total units of AHI affordable housing <i>Includes projects completed & underway. Excludes spin-off units.</i>	501
AHI cost per unit	<u>\$267.40</u>

RECOMMENDATIONS

As a result of Alberta’s current economy, inflation, population growth, property prices and a booming construction industry have contributed to an undeniable need for affordable housing province-wide. These recommendations will attempt to address how best to leverage AREF’s influence and resources as inferred by the consultant’s observations.

Need for a Housing Facilitator-type role in smaller municipal centres

The findings of this report can support the need for increased affordable housing inventory and housing options in the larger centres where need is proportionately higher (Calgary, Edmonton, Lethbridge, Medicine Hat, Red Deer, Fort McMurray). Such findings also conclude that larger centres are far better equipped to address this need with the presence and experience of established lobby groups, housing societies, community action committees, tax incentives and corporate support.

Of the 29 core AHI Housing Facilitator projects, this report suggests a success rate of 79% (‘success’ defined by the completion or continued planning of 23 such projects). Despite the size of the municipality, each ‘successful’ proponent in that municipality was able to express a sense of confidence and self-sufficiency in managing their current affordable housing stock and pursuing future projects independently. Ultimately, it was determined by these proponents that a Housing Facilitator’s level of assistance would be redundant if used again.

That said 100% of these proponents were supportive of similar assistance in communities that were not previously approached by AHI Housing Facilitators or visa versa. Some of the communities noted by interviewees to be in dire need of assistance are Wetaskiwin, Olds and Irricana. Though Drumheller, Cold Lake and Strathmore contained projects involving a facilitator, construction costs (inflation), lack of capacity or municipal engagement has since hindered AHI project success in these communities.

As suggested in the Executive Summary, AREF is in a strong position to advocate increased assistance in project planning and development for low-capacity proponents and small-centre municipalities. Whether this assistance be provide through the re-launching of the AHI Housing Facilitator program or by lobbying for increased federal and municipal government action, AREF has a persuasive case for increased community engagement -- and an effective proven method to ensure success.

As an example of government engagement, Canada Mortgage and Housing Corporation (CMHC) operates the Canadian Centre for Public/Private Partnerships whose role is to create partnerships and corporate opportunities for housing options within Alberta. If CMHC was provided with how the AHI Housing Facilitator's hands-on role was effective in increasing affordable housing inventory, government agencies like CMHC might be inclined to consider aspects of this approach in their day-to-day business, thus reallocating a more appropriate bearer of responsibility for this role.

Opportunity for AREF to position itself as a leader in 'affordable housing' initiatives and information

Coupled with the enormous success of AREA's Affordable Housing Initiative and now the analytical observations contained in this report, AREF is in a strong position to expand its brand -- a "go-to" source for proponents through out the province for affordable housing information.

It is recommended that AREF develop the following resource databases:

1. A library or database containing capital and operational funding or grant opportunities (for 3 levels of government);
2. A repository of province-wide consultants who provide expertise or services in: community facilitation and negotiation, business planning, housing industry networks and contacts (REALTORS®, developers, construction companies, non-profit partners, local housing authorities, architects, appraisers, community needs assessors, government), project management, funding proposals, needs assessments, project financing, construction zoning and government relations;
3. A comprehensive listing of successful affordable housing project contacts (by category, name, municipality)

This information would be marketed and made available through AREF's website or office to an audience containing potential proponents, active proponents, real estate boards, REALTORS® and brokerages, religious groups and municipal planners. An initiative such as this is sustainable, cost affective and measurable.

APPENDIX

APPENDIX I

Completed Interviews

Brooks Housing Society

Project: Prairie Village

Contact: Tracey Acorn, Tennant Manager & BHS Secretary

Phone: (403) 501 8026

Contact: Mayor Don Weissback, City of Brooks

Phone: (403) 362 3333/(403) 793 0132

Number of Actual AH Units compared to facilitator's estimate:

Phase I: 39 units (same) 15 townhouses & 24 apartment units.

Completed and occupied March 2005.

Phase II: 48 units (43 estimated) Townhouses & apartment units.

(Application to province/federal recently submitted August 2007)

Facilitator's impact on time of completion:

Initiated the project by laying groundwork.

Facilitator's impact on funding creativity:

Drafted AREF grant which funded architect renderings, environmental tests, and a project coordinator (\$75,000).

Comments from proponents and REALTORS®:

"This project would most certainly not exist without AHFI facilitator involvement [...] we are proud of the clients we are serving." Mayor Don Weissback, City of Brooks

Recommendations for future:

Though Brooks has acquired the necessary knowledge and resources to proceed with like projects on their own, many other communities are struggling and a similar role could be much better utilized there. For example, Drumheller having problems with costing projects relative to inflation and are not sure how to proceed.

History – AHFI Facilitator Involvement

Brenda met Mayor Don Weissback at an AHFI community consultation and discussed the potential need in his community. Brenda then completed needs assessment for the community in September 2001. Forty members of the community got together and determined the need for an affordable housing complex in Brooks. AREA funded a project coordinator (\$75,000) full time. The City of Brooks donated four and a half acres for phase I and II valued at \$900,000.

Phase I was occupied in March 2005. Estimated date of occupation was November 2004. Phase II was projected to seek funding in early 2004 though it's C-AAHPI application was recently submitted in August 2007.

What measurable results were achieved?

Community has achieved quality affordable housing that did not previously exist in the community. Facility is continually at 100% capacity, providing housing at 20% below market rent and has established a qualification process for clients. Facility functions on a positive cash-flow basis allowing rent in phase II to remain the same as phase I.

What worked and what did not?

Primary challenge: There were deficiencies in construction due to labour demand. Contractor selection was poor and therefore instead of completion in six months, construction was completed in twenty-four months.

Success: Over the past fiscal year, six tenants have since purchased their own homes at market value.

Medicine Hat has proven to be a positive role model for Brooks, providing valuable guidance on full-spectrum affordable housing issues. Medicine Hat has provided instruction on attainable mortgages, construction methods and methods, and funding creativity – much of which were issues championed by AHI facilitators between 2001-2003.

Identify any additional barriers that might have been encountered?

Community engagement has been challenging, specifically in bringing like-minded groups together. Brooks Housing Society is working towards becoming the umbrella group in the community for affordable housing.

As most facility staff are volunteers, it is often challenging to acquire the necessary information within the required time lines, specifically acquiring the statistics necessary to back the cause.

How did the facilitators assist in the process?

Brenda laid groundwork for project by bringing the appropriate individuals to the table. She conducted two housing workshops and soon after, helped to form the Brooks Housing Society. Brenda drafted the AREF grant and PDF loan applications and assisted with a letter to government.

Did the program benefit community's size and location?

Current facility has begun to address homelessness and affordable housing in the community indicated by capacity and waiting lists, however, these indicators also suggest need for additional affordable housing options within the community.

Have funding mechanisms changed?

No. In late August 2007, the Brooks Housing Society submitted a second funding application to Alberta Seniors for \$5.6 million for joint federal/provincial funding for phase II. The same was done for phase I, receiving \$1.59 million through federal/provincial funding. *AREF has not yet been involved in phase II.*

How have connections with REALTOR® helped?

Practical knowledge useful: size, costing, rents he could advise on. Brought business perspective, get accounts involved – financial

Did their involvement enhance REALTOR® 'reputation capital'?

During project planning and execution, visibility for the board, including REALTOR involvement, was very positive. The board members roles were large and obvious to the community. Not able to say if the community has remembered the importance of each role, including REALTOR®'s role.

Is there value in reintroducing a similar AHI facilitator role again?

No, the community is now beyond needing help similar to Brenda and Anna's. Though many other communities are struggling and a similar role could be much better utilized there. For example, Drumheller having problems with costing projects relative to inflation and are not sure where to go from here.

Real Estate Board: Brooks Real Estate Board
Brokerage: Coldwell Banker, Brooks Realty
Agent: Brian Reinboldt
Phone: (403) 793 2001

REALTOR® Question – Did any positive PR come from your involvement?

Brian Reinbold was involved with phase I (BHS has not yet involved AREF in phase II.) The collective public perception of all project contributors was positive, broad and obvious.

Cochrane Society of Housing Options

Project: The Homestead

Contact: Sandra Gateman, Tennant Manager

Phone: (403) 851 2261

Contact: Corinne Burns, Previous Tennant Manager (2001)

Phone: (403) 851 2253)

Number of Actual AH Units compared to facilitator's estimate:

Phase I: 21 units (same)

Tenants moved in April 2006.

Facilitator's impact on time of completion:

Having the ground worked established by Brenda, the funding application process was expedited significantly.

Facilitator's impact on funding creativity:

None that they recall.

Comments from proponents and REALTORS®:

"I continue to be shocked that some rural communities are still starting from scratch [with regards to affordable housing]." Corinne Burns, Previous Tennant Manager (2001)

Recommendations for future:

Though Cochrane has acquired the necessary knowledge and resources to proceed with like projects on their own, a similar AHI facilitator role would be of benefit in other small municipalities. The Cochrane Society of Housing Options receives, on average, two calls per month from smaller communities seeking guidance regarding the creation of local affordable housing options in their area. These groups are referred to AREF.

History – AHI Facilitator Involvement

The Cochrane Society for Housing Options (CSHO) is a registered non-profit organization dedicated to encouraging the development of a range of housing options that are affordable to the low-moderate income earners of the Town of Cochrane.

In 2002, a community Housing Needs Assessment and Housing Strategy was completed by the municipality. Based on the results of the study, it was determined that the greatest housing need in Cochrane was rental accommodation for low-moderate income earners. It was at this time that AREF was approached for assistance. An AHI facilitator became involved on a consultative basis, and with the financial assistance of AREF, a project coordinator was hired (Matthew MacNeil). In 2006, the CSHO was pleased to open the doors of its first major project, the *HomeStead*, a 21 unit rental apartment complex containing a mix of bachelor, 1, 2, and 3 bedroom suites. Rental rates are 10% below market value. Applicants must meet specific criteria to be eligible for an apartment.

What measurable results were achieved?

The society's objective to create an affordable housing complex was achieved.

What worked and what did not?

The planning and execution of this project ran smoothly.

Identify any additional barriers that might have been encountered?

The primary barrier for this project was community resistance (NIMBY), which slowed the approval process with the municipality. Due to the subsequent success of *Homestead*, the community has been “broken in” and therefore open and supportive to future projects.

How did the facilitators assist in the process?

Brenda compiled grant applications but worked at arm’s length. She liaised with the Cochrane Affordable Housing Task Force and provided support letter assistance.

Did the program benefit community’s size and location?

Current facility has begun to address homelessness and affordable housing in the community indicated by capacity and waiting lists, however, these indicators also suggest need for additional affordable housing options within the community.

The board is currently gathering information to propose a similar project, elsewhere in town. Further to the Housing Needs Assessment (2002), the community is developing a strategic plan to encourage local affordable housing groups to work together by developing concrete time lines and targets.

Have funding mechanisms changed?

Capital funding avenues are the same, though grants for operational funding are now being utilized.

How have connections with REALTORS® helped?

Since its inception, there has always been a REALTOR® sitting on the society’s board of directors. Their housing inventory knowledge is valuable, as well as business savvy.

Real Estate Board: Calgary Real Estate Board
Brokerage: Unknown
Agents: Lynne Clegg & Cindy Turner
Phone: Unknown

Edmonton City Centre Church Corporation

Project: Golden Nugget Suites
Contact: Sundari Devam, Housing Director
Phone: (780) 425 7927

Number of Actual AH Units compared to facilitator’s estimate:

10 bachelor suites (same)
Occupied August 2002

Facilitator’s impact on time of completion:

Anna helped in the hiring of an appraiser and did this much faster than they would have.

Facilitator’s impact on funding creativity:

Anna’s solicitation of REALTORS® reduced costs by minimizing/eliminating REALTOR® fees. She helped to brainstorm funders (EHTF, RRAP, non-government grant) and forecasted budgets based on various funding scenarios. Her understanding of application nuances ensured funding approval. Also, her understanding surrounding zoning (combining residential and commercial space) saved both time and money, allowing for this project to move forward.

Recommendations for future:

Though ECCCC is more than equipped to create affordable housing in the Edmonton area, smaller agencies have limited in-house expertise. ECCCC values the partnership with local REALTORS® and realty boards. By leveraging REALTOR® knowledge of the housing market, they are able to innovative in their project conceptualization. Further, ECCCC recognizes the value in broader community participation by REALTORS® with the purest notion of real estate being their business.

History – AHI Facilitator Involvement

The Edmonton City Centre Church Corporation owns numerous conversion/new build projects in the Edmonton area intended for affordable housing. From an established relationship with Housing Director, Sundari Devam, Anna brought AREF on-board by identifying the Golden Nugget Suites project as one that could be collaborative. AREF paid the appraising fees and solicited local REALTOR®, Dave Harback, who then in turn solicited three more Edmonton REALTORS®, Brian Finely, Bob Hawgood, and Mike Cameron. All four REALTORS® have continued to be involved with other affordable housing projects in the city to date.

What measurable results were achieved?

The society's objective to create an affordable housing complex was achieved.

What worked and what did not?

The planning and execution of this project ran smoothly. This what they do after all, leveraging relationships with local construction companies for their other projects under their mandate.

Identify any additional barriers that might have been encountered?

None recalled.

How did the facilitators assist in the process?

Noted above. Anna also assisted the initial business plan and set up.

Did the program benefit community's size and location?

Current facility addresses homelessness and affordable housing in the community indicated by capacity and waiting lists, however, these indicators also suggest need for additional affordable housing options within the community which ECCCC continues to address.

Have funding mechanisms changed?

The use of RRAP, rent supplement plus mortgage were new financing options for ECCCC, which they have applied to subsequent projects with the success of the Golden Nugget Suites.

How have connections with REALTORS® helped?

The REALTOR® involved with Golden Nugget Suites, Dave Harback, was used to identify an appropriate property and has since assisted in selecting successful properties for ECCCC in Edmonton such as: Homes Place, Meadows, Labourne House, Pancan Project (didn't come to fruition) and Our Other Place. Dave has also located six residential lots in Chitman, AB whereby barracks housing was moved from Edmonton and relocated on new foundations.

REALTOR® Question – Did any positive PR come from your involvement?

Real Estate Board: REALTORS® Association of Edmonton

Brokerage: Sutton Premier, Edmonton

Agent: Dave Harback

Phone: (780) 451 3939

Positive PR most certainly did result from his involvement with the Golden Nugget Suites project, acquiring numerous clients in both the private and non-profit sectors. He has been able to attribute to his volunteer endeavours, over six figures in commissions from spin-off business. *(At the request of the REALTOR®, the exact figure cannot be noted in this report.)*

Is there value in reintroducing a similar AHI facilitator role again?

Absolutely. The facilitator was able to engage the appropriate REALTORS® whose values and priorities were in keeping with giving back to the community. An AHI facilitator would be valuable in identifying and engaging others.

Edmonton City Centre Church Corporation

Project: The Fortress

Contact: Sundari Devam, Housing Director

Phone: (780) 425 7927

Number of Actual AH Units compared to facilitator's estimate:

2 units (6 estimated, not yet occupied) Front-to-Back Duplex concept
Occupied August 2002

Facilitator's impact on time of completion:

Anna was heavily involved with the design so that the project fit zoning bylaws, hence expediting the approval process.

Facilitator's impact on funding creativity:

Limited involvement though, Anna identified a structural engineer who would complete services at reduced rates. Anna's solicitation of REALTORS® reduced costs by minimizing/eliminating REALTOR® fees.

Recommendations for future:

As for Golden Nugget Suites.

History – AHI Facilitator Involvement

As for Golden Nugget Suites. This new construction functions as a group home for transvestites leaving the sex trade.

What measurable results were achieved?

The society's objective to create an affordable housing complex was achieved, however, operational funding was terminated limiting the number of units they were able to occupy. The opening of the remaining four units is currently under negotiation.

What worked and what did not?

The planning and execution of this project ran smoothly. This what they do after all, leveraging relationships with local construction companies for their other projects under their mandate.

Identify any additional barriers that might have been encountered?

Noted above (measurable results).

How did the facilitators assist in the process?

Noted above. Anna matched ECCCC with REALTOR® to purchase lot, secured the development permit and identified a structural engineer who would complete services at reduced rates.

Did the program benefit community's size and location?

As for Golden Nugget Suites.

Have funding mechanisms changed?

No. Funding acquired through EHTF, RRAP, SCPI, Muttart Foundation Grant, SFRPHI in-kind contribution (National Defence).

How have connections with REALTORS® helped?

The REALTOR® involved with The Fortress, Dave Harback, was used to identify an appropriate property and has since assisted in selecting successful properties for ECCCC in Edmonton such as: Homes Place, Meadows, Labourne House, Pancan Project (didn't come to fruition) and Our Other Place. Dave has also located six residential lots in Chitman, AB whereby barracks housing was moved from Edmonton and relocated on new foundations.

REALTOR® Question – Did any positive PR come from your involvement?

Real Estate Board: REALTORS® Association of Edmonton
Brokerage: Sutton Premier, Edmonton
Agent: Dave Harback
Phone: (780) 451 3939

As for Golden Nugget suites.

Is there value in reintroducing a similar AHI facilitator role again?

As for Golden Nugget suites.

Is there value in reintroducing a similar AHI facilitator role again?

Absolutely. The facilitator was able to engage the appropriate REALTORS® whose values and priorities were in keeping with giving back to the community. An AHI facilitator would be valuable in identifying and engaging others.

Central Edmonton Community Land Trust

Project: The Big Breakfast House

Contact: Brian Finely, Executive Director & REALTOR
Phone: (780) 504 3591

Number of Actual AH Units compared to facilitator's estimate:

1 unit (same) Family home complex.
Tenants moved in March 2002.

Facilitator's impact on time of completion:

During the inception of The Big Breakfast House, Anna brought all stakeholders together, serving in a coordinator role. During the execution of the project, Anna helped largely with administrative assistance, expediting completion.

Facilitator's impact on funding creativity:

Yes. Anna's solicitation of REALTORS® reduced costs by minimizing REALTOR® fees. Don't recall other details.

Recommendations for future:

Though EDCLT has acquired the necessary knowledge and resources to proceed with like projects on their own, a similar AHI facilitator role would be of greater benefit in other projects and smaller municipalities. That said, a facilitator could benefit already successful affordable housing agencies by identifying and initiating other opportunities.

History – AHI Facilitator Involvement

Noted above (impact completion time). The EDCLT combines a Community Land Trust and rent-to-own program to promote home ownership amongst low-income residents living in inner city Edmonton. Anna's involvement was in response to AREF's call for REALTORS® to engage in property searches for affordable housing projects. Dave Harback, local REALTOR®, solicited Brian to the cause. Anna paired Brian with the Land Trust. Brian secured the purchase of the Big Breakfast House property and has since become the Executive Director of EDCLT.

What measurable results were achieved?

The society's objective to create an affordable housing complex was achieved.

What worked and what did not?

The planning and execution of this project ran smoothly by leveraging the Trust's established partnerships with local business.

Identify any additional barriers that might have been encountered?

None recalled.

How did the facilitators assist in the process?

Noted above.

Did the program benefit community's size and location?

Current facility has begun to couple affordable housing and homeownership in the community indicated by capacity and waiting lists, however, these indicators also suggest need for additional affordable housing options within the community.

Have funding mechanisms changed?

No. EDCLT projects are funded by City of Edmonton land lease, RRAP and a short-term loan through the Inner City Housing Society. For this project, community fundraising occurred through Home Depot, A-Channel and Burger King.

How have connections with REALTORS® helped?

Property identification, purchase and business savvy.

REALTOR® Question – Did any positive PR come from your involvement?

Real Estate Board: REALTORS® Association of Edmonton

Brokerage: Private brokerage (unknown)

Agent: Brian Finely

Phone: (780) 504 3591

Yes. Of particular interest, A-Channel documented the construction of the home, which was televised on the Big Breakfast. Both Brian and Anna (AREF) received great exposure. The Edmonton Real Estate Weekly also covered the story.

Is there value in reintroducing a similar AHI facilitator role again?

Absolutely. The facilitator was able to engage the appropriate REALTORS® whose values and priorities were in keeping with giving back to the community. An AHI facilitator would be valuable in identifying and engaging others.

City of Camrose Affordable Housing Project

Projects: Sparling Manor (Rose City Residential Society) & Bethany Group

Contact: Ina Nielson, City Councillor, Affordable Housing Task Force Chair, Social Planning Advisory Committee

Phone: (780) 672 3683

Number of Actual AH Units compared to facilitator's estimate:

Sparling Manor: 24 units (36 estimated) Walk-up apartments & special needs housing
Occupied October 2006

Bethany Group: 18 units (same) Family walk-up apartments
Scheduled opening October 2007

Facilitator's impact on time of completion:

Anna's housing workshops essentially 'planted the seed' for both projects. Following inception, she acted as a facilitator by bringing the appropriate stakeholders together.

Facilitator's impact on funding creativity:

Both groups were heavily reliant on Anna's knowledge for funders and the nuances of such applications. Her solicitation of a REALTOR® reduced costs by minimizing REALTOR® fees.

Comments from proponents and REALTORS®:

"Real estate has been good for me [...] everyone has their own passion. Affordable housing is mine [...] REALTORS® know housing, perhaps not the social issues. Real estate is housing; affordable housing is the hottest topic. Perfect fit." Dale Bowel, Agent REMAX & President, Rose City Residential Society

Recommendations for future:

Though the City of Camrose and Rose City Residential Society have acquired the necessary knowledge and resources to proceed with like-projects on their own, a similar AHI facilitator role would be of greater benefit in smaller municipalities. Of particular need is the Town of Wetaskiwin.

History – AHI Facilitator Involvement

In response to AREF's AHI facilitator program, the City of Camrose invited Anna to a community meeting. She conducted two housing workshops after which an Affordable Housing Task Force was formed to devise an action plan. Both Sparling Manor and the Bethany Group projects resulted from this plan.

What measurable results were achieved?

Camrose achieved quality affordable housing that did not previously exist in the community. Facility is continually at 100% capacity and functions on a positive cash-flow basis.

What worked and what did not?

Inflation was an enormous problem. Between December 2003 (application started) and November 2004 (funding approval), construction costs had increased by \$500,000 for both projects combined. (Drywall was \$95,000 more than originally estimated.) A top-up grant was received through the province to compensate the shortfall.

Identify any additional barriers that might have been encountered?

Affordable housing in Camrose addresses half of the current need; more than doubling since 2002 when the initial action plan was drafted. Further, there are no municipal staff members dedicated to affordable housing.

The community-based Affordable Housing Task Force has identified a site for 57 new units. Provincial/Federal funding applications were submitted August 2007.

Tax exemptions for larger city affordable housing projects (Calgary or Edmonton) are not extended to smaller communities, generally in greater need.

"There are 66 REALTORS® in Camrose and only two are volunteers on the Affordable Housing Task Force: Dale Bowel REMAX and Gerry Davis COLDWELL. REALTOR® engagement remains a challenge in our community." Dale Bowel, REMAX

How did the facilitators assist in the process?

Noted above.

Did the program benefit community's size and location?

Noted above.

Have funding mechanisms changed?

No.

How have connections with REALTORS® helped?

Yes. Dale Bowel has brought highly creative and effective mortgage repayment strategies. Sparling Manor's \$100,000 mortgage will be paid off by June 2008 and will be re-mortgaged to off set costs of a second project.

REALTOR Question – Did any positive PR come from your involvement?

Real Estate Board: REALTORS® Association of Edmonton
Brokerage: REMAX
Agent: Dale Bowel
Phone: (780) 672 7474

Is there value in reintroducing a similar AHI facilitator role again? To do what?

Absolutely. The facilitator was able to engage the appropriate REALTORS® whose values and priorities were in keeping with giving back to the community. An AHI facilitator would be valuable in identifying and engaging others.

Calgary Community Land Trust (CCLT)

(Operates within the Calgary Homeless Foundation, has separate volunteer board)

Contact: Rhonda Hicklin
Phone: (403) 262 2921 Ext. 224

Number of Actual AH Units compared to facilitator's estimate:

N/A

Facilitator's impact on time of completion:

Facilitator introduced the concept of the land trust to the Calgary Homeless Foundation. She also assisted with the visioning, business plan and formation of the board.

Facilitator's impact on funding creativity:

Facilitator secured start-up funding through: AREF grant, AREF grant (use of consultant for phase II), HRSDC grant (cost-match AREF) and in-kind donations from CHF (provided office space and operational costs).

Recommendations for future:

N/A

History – AHI Facilitator Involvement

Noted above. CCLT was incorporated in 2003 and has since been involved with seven affordable housing projects in Calgary (Northhill, Kootney, Holy Cross, King Edward School, Inglewood Cottages and two others in negotiation). CCLT has provided land for three of these projects and assisted in land acquisition for the balance.

How did the facilitators assist in the process?

Noted above.

Have funding mechanisms changed?

No.

How have connections with REALTORS® helped?

Unknown.

Did their involvement enhance REALTOR® 'reputation capital'?

Unknown.

Is there value in reintroducing a similar AHI facilitator role again?

N/A

**Calgary Habitat for Humanity and Calgary Community Land Trust (CCLT)
Projects: Sun Court (Dover) and Sheftel Court (Nosehill)**

Contact: Joni Rabena, Calgary Habitat for Humanity
Phone: (403) 253 9331 Ext. 221

Number of Actual AH Units compared to facilitator's estimate:

Sun Court: 27 units (28 units estimated) Stacked townhouse, new construction, ownership

Occupied 2006

SPIN OFF Sheftel Court: 12 units (mid construction)

Facilitator's impact on time of completion:

N/A

Facilitator's impact on funding creativity:

N/A

Recommendations for future:

No future project planned between Calgary Habitat for Humanity and CCLT.

History – AHI Facilitator Involvement

Current staff at Calgary Habitat for Humanity is not familiar with the AHI facilitator and her role in these projects. Therefore, supporting information is limited.

City of Cold Lake

Projects: (No project name) – NO PROGRESS SINCE 2003

Contact: Louise Johnson, REMAX
Phone: (780) 594 4445/812 0979

Number of Actual AH Units compared to facilitator's estimate:

8 units – on hold

Intended to serve low-income seniors, those in need of assisted living, and students/newly employed youth.

Facilitator's impact on time of completion:

N/A

Facilitator's impact on funding creativity:

N/A

History – AHI Facilitator Involvement

In response to AREA's AHI facilitator program, the City of Cold Lake invited Anna to a community meeting. She conducted two housing workshops, the second having 60 participants and CBC coverage. A need for affordable housing was recognized and a community team was created to pursue options and identify a project.

What measurable results were achieved?

None at this time.

What worked and what did not?

Lack of municipal engagement and priority has allowed this project to be postponed. New staff following the municipal election brought all progress made back to square one, as new comers had not been involved with initial planning and have prioritized other local initiatives accordingly. The project is currently sitting with Family Community Social Services.

Identify any additional barriers that might have been encountered?

REALTOR®, Louise Johnson, was involved in this project for over four years. Due to issues with the municipality and income loss (resulting from volunteer time invested in this project), she was forced to remove herself from the community team.

Bonnyville Affordable Housing Association (BAHA)

Project: Bonnyville Affordable Housing Association Project for People with Disabilities

Contact: Vic Stapleton, Town of Bonnyville, Community Development
Phone: (780) 826 3496

Number of Actual AH Units compared to facilitator's estimate:

6 units (5 barrier-free apartments & 1 assisted living unit)

Four-plex, new construction, rental

To be occupied October 15, 2007

7 units (estimate)

Facilitator's impact on time of completion:

None recalled.

Facilitator's impact on funding creativity:

Facilitator secured funding for an AREF grant. Funding through the Town and Dove Centre was secured independently.

Recommendations for future:

Though Bonnyville has acquired the necessary knowledge and resources to proceed with like projects on their own, a similar AHI facilitator role would be of benefit in other small municipalities. The city is not in a position to assist other municipalities as its time and resources are focused on addressing it's own needs.

History – AHI Facilitator Involvement

Facilitator was invited into the community to conduct two housing workshops. The BAHA project that resulted, was one first of its kind within the community.

What measurable results were achieved?

Community has achieved quality affordable housing that did not previously exist. Facility is continually at 100% capacity and functions on a positive cash-flow basis.

The following projects are currently in either the application or planning process: one private development and 8 unit apartment (2 units intended for disabled persons and 6 units intended for the 'working poor' (application submitted August 2007); planning process for 30 units of transitional housing (partnership with local hotel owner); and developing a model for an entry-level housing cooperative.

What worked and what did not?

Nothing noted.

Identify any additional barriers that might have been encountered?

Nothing called.

How did the facilitators assist in the process?

Facilitator assisted in the set-up of the BAHA, sparking need and enthusiasm resulting in not only the completion of this project, but number spin-off projects.

Did the project benefit the community's size and location?

Yes, while presenting an increased need for addition housing.

Have funding mechanisms changed?

Yes, for additional projects.

How have connections with REALTORS® helped?

Two REALTORS® were involved with the initial planning of the BAHA project, sharing housing/property inventory knowledge.

The acquisition of commercial land in Bonnyville and area is too expensive. BAHA is reliant on recreation land donated by the Town. Therefore, subsequent REALTOR® involvement has been limited.

Did their involvement enhance REALTOR® 'reputation capital?'

Unknown.

REALTOR® Question – Did any positive PR come from your involvement?

Real Estate Board: North Eastern Alberta Real Estate Board

Brokerage: Northern Lights Realty

Agent: Dale Panteluk and Gerry Storscheck

Phone: (780) 853 6763

Unable to reach agent.

Wood Buffalo Housing and Development Corporation (*previously managed by Fort McMurray Affordable Housing Society*)

Project: Venture Terrace

Contact: Jessica Daymond, Wood Buffalo Housing and Development Corporation

Phone: (780) 799 4043

Number of Actual AH Units compared to facilitator's estimate:

40 units (same) 30 duplexes, rental
Occupied June 2004

Facilitator's impact on time of completion:

N/A

Facilitator's impact on funding creativity:

N/A

History – AHI Facilitator Involvement

The Fort McMurray Affordable Housing Society had to turn to the municipality to take over the role of the developer because of several factors that prevented CMHC from underwriting the mortgage. From the municipality, the project was then taken over by the Wood Buffalo Housing and Development Corporation.

The initial purpose of the project was to be employer assisted. Employers would buy-in to secure rental property for employees at \$15,000. At the time, this was deemed too expensive, so the concept was unsuccessful. Once the project was taken over by the Wood Buffalo Housing and Development Corporation, the project was added to the affordable housing portfolio, rental inventory. Occupancy began June 2004 and has been at full capacity since.

A spin-off project has materialized, leveraging the intended concept of Venture Terrace while managed by the FMAHS. Perry Crescent is a 24-unit single-family home project. Different to Venture Terrace, this is a homeownership project by which the employer provides the \$15,000 down payment for the employee within the BFDC Home Ownership portfolio. Occupancy began November 2006.

Added success: From the 40-unit Venture Terrace project, six families have now transitioned from rental to homeownership between 2004 to 2006.

What measurable results were achieved?

Community has achieved additional quality affordable housing. Both facilities are running at 100% capacity and function in a positive cash-flow basis.

What worked and what did not?

Noted above.

Identify any additional barriers that might have been encountered?

Nothing recalled.

How did the facilitators assist in the process?

Prior to project take over, the facilitator conducted two housing workshops and supported in moving the project forward, including interviewing the minister of Alberta Seniors.

Did the project benefit the community's size and location?

Yes, while presenting an increased need for addition housing.

Have funding mechanisms changed?

Yes, for subsequent projects.

How have connections with REALTORS® helped?

N/A

Handicapped Housing Society of Alberta

Project: Gravelle Place

Contact: Bob Hawgood, REALTOR®

Phone: (780) 451 3939

Number of Actual AH Units compared to facilitator's estimate:

76 units (same)

High rise apartment, new construction, rental

Completed and occupied March 2005.

Facilitator's impact on time of completion:

Yes. Facilitator (Anna) helped to move the project along mainly in a coordinator role, chairing meetings, pooling resources, allocating jobs and timelines.

Facilitator's impact on funding creativity:

Facilitator secured a contact at EHTF for funding.

Recommendations for future:

Having a knowledgeable facilitator in a coordination role allowed other professionals focus on what they do best, whether that be sourcing out potential properties, construction materials or developers.

History – AHI Facilitator Involvement

The Society contacted AREF in response the AHI advertising in the Edmonton REALTOR® News.

The facilitator originally solicited REALTOR® Dave Harback, who then in turn solicited three more Edmonton REALTORS®, Brian Finely, Bob Hawgood, and Mike Cameron. Bob Hawgood joined the Society's efforts to locate an appropriate property.

What measurable results were achieved?

Community has achieved additional quality affordable housing, which is continually at 100% capacity.

What worked and what did not?

Planning and execution ran smoothly.

Identify any additional barriers that might have been encountered?

None recalled.

How did the facilitators assist in the process?

Noted above.

Did the program benefit community's size and location?

Definitely. The society's objective to create an affordable housing complex for persons with disabilities was achieved.

Have funding mechanisms changed?

No.

How have connections with REALTORS® helped?

Practical knowledge useful: size, costing, rental advice.

Brain Hawgood identified 10 side-by-side properties and negotiated their sales with property owners. There was no neighbourhood opposition though one owner (corner property) would not sell. The remaining nine homes were torn down and replaced by a four-story apartment complex.

Did their involvement enhance REALTOR® 'reputation capital?'

Yes. Brian received repeat business from the owners from home the site was purchased and he also sourced the warehouse property, purchased by Women Building Futures.

Is there value in reintroducing a similar AHI facilitator role again?

Yes. With Gravelle Place, there was enormous value having one coordinator pull the appropriate contact together.

Grande Prairie Residential Society

Project: Margaret Edgson Manor

Contact: Dale Williams, Past President and AREA Director
REALTOR®, William Schoepp Realty
Phone: (780) 833 5555

Number of Actual AH Units compared to facilitator's estimate:

70 units (65 estimate)
16 wheelchair accessible suites/54 affordable housing units
Walk-up apartment, new construction, rental
Completed and occupied February 2005

Facilitator's impact on time of completion:

N/A.

Facilitator's impact on funding creativity:

N/A

Recommendations for future:

N/A

History – AHI Facilitator Involvement

Need for affordable housing was determined by the Society. The facilitator provided input to AREA Director (Dale Williams) on forming a local committee and rallying city support.

Dale has continued to address the affordable housing shortage through his own community work and initiatives.

What measurable results were achieved?

Community has achieved additional quality affordable housing, which is continually at 100% capacity and has doubled the wheelchair accessible housing in town.

What worked and what did not?

It took three years to receive funding through the Bilateral Agreement for Affordable Housing. The city played a key role in facilitating the transfer of funds from the federal government.

Identify any additional barriers that might have been encountered?

None recalled.

How did the facilitators assist in the process?

Noted above.

Did the program benefit community's size and location?

Definitely. The society's objective to create an affordable housing complex for persons with disabilities was achieved. Despite pressing need for addition units, the project has alleviated some of the pressure.

Have funding mechanisms changed?

No.

How have connections with REALTORS® helped?

Practical knowledge useful: housing and property inventory, costing, rental advice.

Did their involvement enhance REALTOR® 'reputation capital?'

Yes. The success of Margaret Edgson Manor has assisted helped to initiate twelve additional projects (applications recently submitted to Alberta Seniors, August 2007) – two of which have been submitted by Dale's realty company: a daycare and affordable housing project.

Is there value in reintroducing a similar AHI facilitator role again?

N/A

Social Housing and Action Committee (Lethbridge)

Project: Various

Contact: Stan Mills, REALTOR® Sun City Realty Ltd.

Phone: (403) 329 8899

Number of Actual AH Units compared to facilitator's estimate:

N/A

Facilitator's impact on time of completion:

N/A.

Facilitator's impact on funding creativity:

N/A

Recommendations for future:

N/A

History – AHI Facilitator Involvement

The facilitator had no direct involvement in these projects as indicated by the REALTOR®. Inclusion in this report solely highlights local REALTOR® engagement in affordable housing projects and insight into some of the affordable housing initiatives in Lethbridge. REALTOR®, Stan Mills, was asked to assist with projects in 2000 with the Social Housing and Action Committee and has continued as vice president on their board ever since.

What measurable results were achieved?

Community has achieved additional quality affordable housing, which is continually at 100% capacity.

What worked and what did not?

N/A

Identify any additional barriers that might have been encountered?

N/A

How did the facilitators assist in the process?

Noted above.

Did the program benefit community's size and location?

N/A

Have funding mechanisms changed?

N/A

How have connections with REALTORS® helped?

Practical knowledge useful: housing and property inventory, costing, rental advice.

During two visits to Lethbridge (with architectural students), Dr. Avi Friedman from McGill University assisted in the selection of nine potential sites for affordable housing, though ultimately, owners and developers were not interested. From the media and community exposure gained by his visits, four new spin-off projects evolved: Scenic Apartments (rent supplement used); Alec Arms Hotel (conversion to 36 affordable housing units); York Hotel (conversion to 37 affordable housing units); and The Atrium (100 single units, which was rejected by the surrounding community and subsequently the developer went broke).

Did their involvement enhance REALTOR® 'reputation capital'?

Yes. Spin-off business can be attributed to volunteer work.

Is there value in reintroducing a similar AHI facilitator role again?

N/A

The Lacombe Foundation (*previously managed by the Community Housing Initiative*)

Project: The Lacombe Affordable Housing Complex

Contact: Donny Tofts, Past Chair of the Community Housing Initiative

Phone: (403) 782 6637

Number of Actual AH Units compared to facilitator's estimate:

28 units (Estimate 10-20)

Townhouse complex, two buildings

Construction underway

Facilitator's impact on time of completion:

None recalled.

Facilitator's impact on funding creativity:

Facilitator's assistance in securing the AREF grant was crucial as it largely funded a consultant to conduct a community needs assessment. The assessment proved to be an excellent tool in supporting and securing project funding but also aided in rallying community awareness to the issue of affordable housing and need.

The Facilitator also provided feedback on grant applications and other grant opportunities.

Recommendations for future:

Though the needs assessment that was conducted is now outdated, the Lacombe Foundation and Community Housing Initiative can recognize continued need within the

community for additional affordable housing inventory. Use of a AREF facilitator would help to further engage the community and required stakeholders towards other housing options and projects.

History – AHI Facilitator Involvement

The facilitator was contacted through Neighbourhood Place, an agency who constructs family housing.

What measurable results were achieved?

Community has achieved additional quality affordable housing, which is expected to run at 100% capacity as indicated by waiting lists.

What worked and what did not?

A two-year delay occurred due to the rise in construction prices, which increased between 20-30%. A grant was attained to top-up necessary funds.

Identify any additional barriers that might have been encountered?

Due to lacking capacity, the Community Housing Initiative was forced to turn the project over to the Lacombe Foundation, the local Affordable Housing authority.

How did the facilitators assist in the process?

The facilitator conducted two housing workshops, provided input on grants, provided additional grant opportunities and a sample letter to government.

Did the program benefit community's size and location?

Yes.

Have funding mechanisms changed?

No.

How have connections with REALTORS® helped?

Practical knowledge useful: housing and property inventory, costing, rental advice.

Did their involvement enhance REALTOR® 'reputation capital'?

Unknown.

Real Estate Board: Red Deer Real Estate Board
Brokerage: REMAX Real Estate, Central Alberta
Agent: Don Parker and Jon Nicols
Phone: (403) 782 4301

Unable to reach either agent.

City of Leduc, Property Manger: The Leduc Foundation

Project: Willow Park Affordable Housing Project

Contact: Nancy Laing-Goffers
Phone: (780) 986 2814

Number of Actual AH Units compared to facilitator's estimate:

24 units (same)
Six four-plexes, new construction, rental
Occupied September 24, 2007

Facilitator's impact on time of completion:

None recalled.

Facilitator's impact on funding creativity:

None recalled.

Recommendations for future:

The Leduc Foundation can recognize continued need within the community for additional affordable housing inventory. Use of an AREF facilitator would help to further engage the community and required stakeholders towards other housing options and projects.

History – AHI Facilitator Involvement

Local REALTORS® George Rogers, Loretta Hawthorne and Bob Buttar contacted the facilitator.

What measurable results were achieved?

Community has achieved additional quality affordable housing, which was immediately at 100% capacity upon opening.

In response to the growing demand for affordable housing, City Council has recently begun a new three-year affordable housing initiative.

The City has partnered with Leduc Foundation and the towns of Devon and Beaumont to capitalize on the provincially funded Affordable Housing Initiative, which was designed to help municipalities, who are in high-need of affordable housing.

In this partnership, as with the Willows, the Leduc Foundation will serve as the administrative and co-ordinating body.

According to Nancy Laing-Goofers, they currently have 85 households, of either single or multi families, on the waiting list for new housing initiatives.

What worked and what did not?

The planning and execution of this project ran smoothly.

Identify any additional barriers that might have been encountered?

None recalled.

How did the facilitators assist in the process?

The facilitator conducted two housing workshops, presented the notion of a land trust concept and provided basement suite background material to support the community's action plan.

Did the program benefit community's size and location?

Yes.

Have funding mechanisms changed?

No.

How have connections with REALTORS® helped?

Practical knowledge useful: housing and property inventory, costing, rental advice.

The Mayor at that time, George Rogers, was previously a REALTOR® in the community and was able to leverage his knowledge in assisting REALTOR®, Loretta Hawthorne, in property searches.

Did their involvement enhance REALTOR® 'reputation capital'?

Yes.

Real Estate Board: REALTORS® Association of Edmonton
Past Mayor of Leduc: 1998-2004
Brokerage: Royal LePage (1992-1995)
Agent: George Rogers
Phone: (403) 782 4301

Brokerage: REMAX Heritage
Agent: Loretta Hawthorne
Phone: (780) 502 7211

The Panoka Champion's Centre

Project: (same)

Contact: Klaas Klooster, Executive Director
Phone: (403) 580 5645

Number of Actual AH Units compared to facilitator's estimate:

16 rooms (14 rooms w/ sink plus 2 double occupancy rooms, shared facilities and common area) Rooming house for men with mental disorders.

14-unit estimate

Appartment Renovation, rental

Occupied June 2002

Facilitator's impact on time of completion:

N/A

Facilitator's impact on funding creativity:

N/A

Recommendations for future:

A steering committee has been formed for phase II of the Champion Centre in Panoka. Having a facilitator with similar skill sets to those of Anna would be highly beneficial in expediting the project's process in terms of providing funding source guidance and providing ideas for the creation of a like-minded woman 's facility in the community.

History – AHI Facilitator Involvement

The Panoka Champions Centre for publicity reasons contacted the AREF facilitator as the first project had already been completed. Anna provided advice surrounding sustainability for the first project (balancing operating costs) before pursuing a second project because at this same time, the Champion's Centre was researching the need for a woman-focused project in the town.

The facilitator liked the notion of social enterprise involved in this project, combining both housing rents and small business (a public café and antique store).

After determining themselves that a facility of this nature would require a different layout to address women's needs, it has since been put on hold. It was also determined that greater need still existed for men, so a second phase is being planned accordingly.

What measurable results were achieved?

The Executive Director, Klaas Klooster, first privately built the Panoka Champion's Centre before registering for charity status in 2003. He and \$16,000 RRAP funding floated capital costs. The project cost was \$86,000. Charity status brought with it broader funding opportunities.

The Champion's Centre Inc. is now a national charitable corporation run by a board of directors and local advisory boards. Their purpose is to:

1. Provide room and board for the disadvantaged.
2. Aspire to teach daily living skills.
3. Empower residents to make positive life choices.
4. Encourage community interaction through effective businesses, chapel cafe and volunteerism.
5. Provide a home that meets the need of our target population.

Through this centre the community has achieved additional quality affordable housing, which was immediately at 100% capacity upon opening. The facility also houses a public café and antique store, which with rent collected, floats all operating costs.

In response to the success of the Champion's Centre in Panoka, Medicine Hat approached the organization to establish a similar project there with multiple community partnerships. The Medicine Hat Champion's Centre opened in 2005; a replica of the project in Panoka.

For both the Panoka and Medicine Hat Champion's Centres, second phases are in development separate community-based steering committees.

Plans for an Edmonton Champion's Centre is currently underway and a property in Red Deer has been identified to establish a centre there also.

What worked and what did not?

Largely, the Executive Director, as a personal project completed renovations for the Panoka Champion's Centre. Lack of personal funds prevented him from hiring assistance. This significantly slowed the completion process.

Identify any additional barriers that might have been encountered?

Acquiring capital funding for the first project was problematic because funding sources were not known. Experience has brought with it new resources and funding opportunities.

With the addition of two Centre expansions and the planning of two additional locations, the 'skeleton staff' is stretched to capacity. This issue needs to be addressed by hiring additional staff to manage workloads. Operational funding is limited, so additional funding will be required.

How did the facilitators assist in the process?

Noted above.

Did the program benefit community's size and location?

The Champion centre runs at full capacity having a positive cash flow and its phase II is underway to address existing need.

Have funding mechanisms changed?

Yes, noted above.

How have connections with REALTORS® helped?

Practical knowledge useful: housing and property inventory, costing, rental advice.

Local REALTOR®, Deb Stevens, was active on the Board of Directors but not in a realty capacity as this service has not been necessary.

Did their involvement enhance REALTOR® 'reputation capital?'

Not known.

Agent: Deb Stevens

Phone: Not known.

Proposed Drumheller HOME Program

Contact: Ray Page, REALTOR® and Board Member for the Drumheller Housing Administration

Phone: (403) 823 4114

History – AHI Facilitator Involvement

Facilitator contacted local REALTOR®, Ray Page, who helped to coordinate two housing workshops. At that time, a local committee wished to begin offering the HOME Program in Drumheller, which would help those leaving rental housing into homeownership. Ray was involved in the education and counselling of the program.

Once real estate prices increased significantly rose, the logistics of the HOME Program soon dwindled.

Though the HOME Program did not come to fruition, spin-off projects did result from valuable discussions and inspiration acquired from the housing workshops. The following project was one such project:

Project: Drumheller Affordable Housing Project

20 suites of affordable housing

New construction apartment, rental

Occupied 2008

The Drumheller Affordable Housing Project has recently tendered a 20-suite affordable housing apartment, funded by the Province and land donated by the Town of Drumheller. The Drumheller Housing Administration through the Community Housing Project will manage it.

Facilitator's impact on time of completion:

N/A

Facilitator's impact on funding creativity:

AREF has provided funding to hire a project manger.

What measurable results were achieved?

20 suites of affordable housing.

What worked and what did not?

Project planning and execution has run smoothly thus far.

Identify any additional barriers that might have been encountered?

None recalled.

How did the facilitators assist in the process?

Noted above.

Did the program benefit community's size and location?

During the facilitator's involvement and housing workshops, affordable housing at that time was not in great need because rent was so inexpensive. By proceeding with the

Drumheller Affordable Housing Project, the community was able to address the current affordable housing issue proactively, rather than reactively.

Though the need for affordable housing is now greater than the supply, the project has helped to minimize some community pressure.

Have funding mechanisms changed?

No.

How have connections with REALTORS® helped?

Practical knowledge useful: housing and property inventory, costing, rental advice.

Did their involvement enhance REALTOR® 'reputation capital?'

Yes. Reputation. No financial benefit tracked.

Real Estate Board: Brooks Real Estate Board

Brokerage: Page Insurance Ltd.

Agent: Ray Page

Phone: (403) 823 4114

Medicine Hat Community Housing Society

Project: Transitional Housing Project

Contact: Darren Rud, Coordinator for Community Housing Department/Past Executive Director of the Medicine Hat Community Housing Society

Phone: (403) 526 2154

Number of Actual AH Units compared to facilitator's estimate:

21 units (19 transitional housing units & 2 overflow units for the homeless shelter)

Hotel Renovation, rental

20 estimated

Occupied November 2002

Facilitator's impact on time of completion:

None.

Facilitator's impact on funding creativity:

Assisted in AREF grant of \$80,000

Recommendations for future:

None noted.

History – AHI Facilitator Involvement

The Medicine Hat Community Housing Society contacted the facilitator through AREF. The facilitator provided background research and helped with fundraising. She also provided information to the Medicine Realty board about positioning projects to receive Federal/Provincial rental program support.

What measurable results were achieved?

21 units of transitional housing.

What worked and what did not?

The multitude of funding sources for the purchase and renovation of the project was excellent.

Identify any additional barriers that might have been encountered?

None recalled.

How did the facilitators assist in the process?

Noted above.

Did the program benefit community's size and location?

Yes, though the Medicine Hat Community Housing Society has recently submitted a proposal for 50 units of affordable housing called Southland Development.

Have funding mechanisms changed?

No.

How have connections with REALTORS® helped?

Practical knowledge useful: housing and property inventory, costing, rental advice.

The Medicine Hat Real Estate Board has approached AREF for funding for the Southland Project and has provided funding to a separate affordable housing project in Medicine Hat, Champion's Centre.

Did their involvement enhance REALTOR® 'reputation capital?'

Not known.

Agents/MHREF members: Brian Patterson, Lorne Krause, Toni Gross, Pat Jamieson, Sandy Kappeler and Denis Schlenker.

Step One Housing Society

Project: Glengale Manor

Contact: Pat Clay, Board Member

Phone: (403) 934 3666

Number of Actual AH Units compared to facilitator's estimate:

Glendale Manor: 6 units (same)

Transitional rental housing for persons with mental health diseases.

Occupied May 2005

Row houses project: 0 units (40 units estimated)

Inadequate capacity to pursue at this time.

Facilitator's impact on time of completion:

Significant. This small, inexperienced society heavily relied on the facilitator (Brenda) for guidance and administrative support. Without her help, this project would not have materialized.

Facilitator's impact on funding creativity:

Minimal. The facilitator assisted with a RRAP application, which was not submitted, as these funds were not needed.

Recommendations for future:

The society at this time is pressed to capacity and is not in a position to take on additional projects with volunteer staff.

History – AHI Facilitator Involvement

The facilitator made initial contact with the group. Brenda met with the society four times and had a great deal of correspondence with them. She helped to write

applications for RRAP and SFRPHI, wrote a letter to the town council regarding zoning and provided process information to the society for the project.

What measurable results were achieved?

6 units of transitional rental housing. The society has identified a higher need for additional housing like this, but for families. This project assists single only.

Identify any additional barriers that might have been encountered?

The property was previously owned by the RCMP (barracks housing). There was three years of political red tape to move through to acquire the property, which significantly delayed the project. Brenda was instrumental in flushing out the appropriate action.

How did the facilitators assist in the process?

Noted above.

Did the program benefit community's size and location?

Yes. Noted above.

Have funding mechanisms changed?

No.

How have connections with REALTORS® helped?

Practical knowledge useful: housing and property inventory, costing, rental advice.

REALTOR® Jens Lehman is vice president of the Board of Directors and initially found the property. His involvement has been purely from own interest.

Did their involvement enhance REALTOR® 'reputation capital?'

Yes. Reputation.

Edmonton Housing Industry Forum

Project: Affordable Home Ownership Education Project

Contact: Anna Bubel

Phone: (780) 425 4122

Resulted in HOME Program

Edmonton Housing Industry Forum

Project: Revolving Down payment Fund

Contact: Anna Bubel

Phone: (780) 425 4122

Resulted in HOME Program

APPENDIX II

Projects Consultant was Unable to Contact (details confirmed on-line or by AHI facilitator, Anna Bubel)

Edmonton City Centre Church Corporation

Project: Our Place

Contact: Sundari Devam, Housing Director
Phone: (780) 425 7927

Number of Actual AH Units compared to facilitator's estimate:

10 units (9 estimate)
10 private rooms with shared communal space (cooking, living and quiet space)
Apartment, renovation
Occupied 2002

Real Estate Board: REALTORS® Association of Edmonton
Brokerage Board: Sutton Premier, Edmonton
Agent: Dave Harback
Phone: (780) 451 3939

Edmonton City Centre Church Corporation

Project: Unnamed

Contact: Sundari Devam, Housing Director
Phone: (780) 425 7927

Number of Actual AH Units compared to facilitator's estimate:

4 units (same)
House, rental
Apartment, renovation
Occupied 2002

Real Estate Board: REALTORS® Association of Edmonton
Brokerage: Sutton Premier, Edmonton
Agent: Dave Harback
Phone: (780) 451 3939

The ECCCC purchased a group home for mentally ill persons from the Edmonton Inner City Housing Society. The home continues to operate with the same occupants as it did prior to the sale.

Managed by: unknown - NO PROGRESS SINCE 2003

Project: Unnamed

Contact: Anna Bubel, Consultant
Phone: (780) 425 4122

Number of Actual AH Units compared to facilitator's estimate:

30-40 estimated
Three story walk-up condo complex
New pre-fab construction, ownership
Occupied 2002

Real Estate Board: REALTORS® Association of Edmonton
Brokerage: Sutton Premier, Edmonton
Agent: Dave Harback
Phone: (780) 451 3939

Edmonton City Centre Church Corporation

Project: Transitional Housing Project

Contact: Sundari Devam, Housing Director

Phone: (780) 425 7927

Number of Actual AH Units compared to facilitator's estimate:

9 units (same)

Apartment, renovation

Occupied 2003

Real Estate Board: REALTORS® Association of Edmonton

Brokerage: Sutton Premier, Edmonton

Agent: Dave Harback

Phone: (780) 451 3939

St. Paul Affordable Community Housing / Northern Lights Realty

Project: Unknown

Contact: Dick Wirges, Board Chair and REALTOR

Phone: (780) 645 6811

Number of Actual AH Units compared to facilitator's estimate:

1-unit (same)

Single-family bi-level, ownership

Occupied 2003

Facilitator conducted two housing workshops and made a presentation in Whitecourt to Board of Directors for the Persons with Disabilities Northern Alberta Region.

APPENDIX III

Projects Consultant was Unable to Contact or Collect Subsequent Information

Municipality - Vilna

Project: Undetermined

Contact: Perry Phillips, Northern Lights Realty

Phone: (780) 645 6811

Unknown if anything has come from two housing workshops held by the facilitator.

Red Deer Housing Committee

Project: Undetermined

Contact: Wendy Klassen, Social Planning, and City of Red Deer

Phone: (403) 342 8100

APPENDIX IV

GLOSSARY OF ACRONYMS

AHI:	Alberta Housing Initiative
AREA:	Alberta Real Estate Association
AREF:	Alberta Real Estate Foundation
AUMA:	Alberta Urban Municipalities Association
BAHA:	Bonnyville Affordable Housing Association
BHS:	Brooks Housing Society
C-AAHPI:	Canada-Alberta Affordable Housing Partnership Initiative
CCLT:	Calgary Community Land Trust
CHF:	Calgary Homeless Foundation
CMHC:	Canada Mortgage and Housing Corporation
CNIT:	Core Need Income Threshold
CSHO:	Cochrane Society for Housing Options
CREB:	Calgary Real Estate Board
ECCCC:	Edmonton City Centre Church Corporation
EDCLT:	Edmonton Development Community Land Trust
EHTF:	Edmonton Housing Trust Fund
GPRS:	Grand Prairie Residential Society
HHSA:	Handicapped Housing Society of Alberta
HRDC:	Human Resources and Development Canada
MHCHS:	Medicine Hat Community Housing Society
MHREB:	Medicine Hat Real Estate Board
NIMBY:	“Not In My Backyard”
PDF:	Professional Development Funding
RRAP:	Residential Rehabilitation Assistance Programs
SCPI:	Supporting Communities Partnership Initiative
SFRPHI:	Surplus Federal Real Property Housing Initiative

APPENDIX V
Spin-Off Project: Explanation

Proponent	Spin-Off Project Name(s)	Project Details (If available)	Number of Spin-Offs
Cochrane Society of Housing Options <i>The Homestead</i>	Not yet determined	Mid-planning. 21 units.	1
Camrose Affordable Housing Task Force <i>The Bethany Group & Sparling Manor</i>	Not yet determined	Pending funding approval. 57 units.	1
Edmonton City Centre Church Corporation (ECCCC) Golden Nugget Suites	Homes Place Meadows Labourne House Pancan Project Our Other Place	Complete	5
REALTOR® Dave Harback	Not yet determined	Mid-planning. Secured residential lots in Chitman, AB. Barracks housing to be transplanted from Edmonton to new foundations	1
Calgary Community Land Trust (CCLT)	North Hill Kootney Holy Cross King Edward School Inglewood Cottages Not yet determined Not yet determined	Mid-planning, mid-construction or completed	7
Calgary Habitat for Humanity/CCLT	Sheftel Court	Completed. 12- units.	1
Bonnyville Affordable Housing Association (BAHA)	Not yet determined Not yet determined Housing Co-op	Mid-planning. 8 unit apartment; 30 units transitional housing; entry-level housing cooperative	3
Wood Buffalo Housing & Development Corporation Venture Terrace	Perry Crescent	Completed. Affordable home ownership. 24 units.	1
Grande Prairie Residential Society	Not yet determined	Pending Funding approval. Twelve separate project applications have been submitted for funding.	12
Social Housing and Action Committee (Lethbridge)	Scenic Apartments Alec Arms Hotel York Hotel	Completed. Alec Arms (36 units), York Hotel (37 units). Conversions.	3
City of Leduc/The Leduc Foundation <i>Willow Park Affordable Housing Project</i>	3-year Affordable Housing Initiative	Mid-planning. Partnership with Town of Devon and Town of Beaumont	1
Champion's Centre Panoka	Medicine Hat Panoka Phase II Medicine Hat Phase II Edmonton Red Deer	Completed. Mid-planning. Mid-planning. Mid-construction. Early planning.	5
Proposed Drumheller HOME Program	Drumheller Affordable Housing Project	Mid-planning/pre-construction. 20 units.	1
Medicine Hat Community Housing Society Transitional Housing Project	Not yet determined	Pending funding approval. Submitted project application for funding. 50 units.	1
Edmonton Housing Forum Affordable Home Ownership Education Program	HOME Program	Initiatives combined.	1
Edmonton Housing Forum Revolving Down Payment Fund			
TOTAL SPIN-OFF PROJECTS			44