NORTH SHORE DISABILITY RESOURCE CENTRE
EXPANDING AFFORDABLE & ACCESSIBLE HOUSING
NORTH VANCOUVER, BRITISH COLUMBIA

Technical Assistance Panel | June 13-14, 2016 | Final Report
ULI BC wishes to thank the North Shore Disability Resource Centre for its commitment and support of the ULI BC TAP program, and the Panelists and Stakeholders who generously gave their time and thoughtful input.
Special thanks to CMHC for their generous support of the NSDRC TAP.

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Founded in 1936, ULI now has members in 95 countries worldwide, representing the entire spectrum of land use and real estate development disciplines working in private enterprise and public service.
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EXECUTIVE SUMMARY

The North Shore Disability Resource Centre (NSDRC) was host to the Urban Land Institute British Columbia (ULI BC) Technical Assistance Panel (TAP) held on June 13th and 14th, 2016. The NSDRC was founded 40 years ago by a group of families and professionals and today serves approximately 2,000 people who live with disabilities on the North Shore of Vancouver. The NSDRC residential services provides 11 group homes that support approximately 44 individuals requiring both independent and supported living. The homes are custom built, accessible, and were constructed over 40 years ago - some with clear title and others that have operating agreements with BC Housing that are soon to expire. Due to the age of the homes, significant renovation or upgrading is required. The home located at 951 Hendry Avenue in the District of North Vancouver was identified as most in need, and was the catalyst for exploring options on how and if the NSDRC-owned properties should be repaired, redeveloped, or sold to support an alternative housing model.

One of the goals of the NSDRC is to provide more accessible and affordable housing. This goal, however, is challenged by rapidly rising home prices on the North Shore and the organization's limited resources and access to real estate development expertise. Expanding quality accessible and affordable housing on the North Shore forms the purpose of the TAP, with the Hendry Avenue property being the prototype for exploring options that can best serve the NSDRC and ultimately more people for years to come.

As an extension of ULI’s Advisory Services Program, the ULI BC TAP Program brings together ULI members with diverse sets of knowledge to volunteer their time in support of providing strategic unbiased advice to a ‘Host’, being a local government or non-profit organization, on a complex land use or real estate development issue. In this case, seven professionals formed the Panel bringing expertise in Architecture, Urban Planning, Real Estate Strategy & Development, and Financial Advisory with Panel deliberations facilitated by Architect, Bruce Haden. Prior to the TAP, all involved were provided with a Briefing Book prepared by the NSDRC to assist the Panel with information about the organization, the subject property, historical, economic, demographic, and real estate market trends.
On day one of the TAP, the Panel met with representatives of the NSDRC for a tour of the Hendry Avenue property. Following the tour, the group met back at the organization’s office and was joined by a stakeholder group consisting of two residents, a mother of an adult son with autism, and an NSDRC board member. The NSDRC provided an overview of their organization, the Stakeholders shared their stories, and an open Q&A discussion ensued.

Panel deliberations commenced early on day two. The group reviewed what they heard on day one, breaking the information down into what was considered financial and non-financial factors, addressing big picture ideas, and then focusing on the Hendry Avenue property. The Panelists agreed that recommendations put forth must be achievable and sensitive to the NSDRC’s existing organizational structure and availability of resources. From this brainstorm session, the following four key areas of recommendation were identified:

1. Create An Asset Management Plan
2. Intensify Selected Sites In Existing Portfolio
3. Hendry Asset Redevelopment Strategy
4. Develop Alliances

The final part of the Panel discussions involved the group splitting into small groups based on their professional expertise to refine and provide details to the key recommendations, while ensuring that the NSDRC’s questions were fully addressed. This was accomplished with a presentation made to the NSDRC via a powerpoint presentation before day’s end.

The Panel recommendations put forth in this report follow what was presented on June 14th, 2016.
“Housing is a personal and complex subject. As municipalities, citizens and communities struggle with issues of density and sustainability as well as environmental concerns, changing demographics and uncertain economic structures, the processes used to determine ‘livability’ is ever changing.”

- Excerpts from NSDRC staff Housing Report, the Board Housing Committee, November 2012

1.0 THE ASSIGNMENT

1.1 SUMMARY OF THE CHALLENGE

One of the major goals for the North Shore Disability Resource Centre (NSDRC) is to maintain and expand affordable and accessible housing on the North Shore. The organization has discussed a few options to meet these goals, including maintaining group homes, selling the group homes and buying condos, or a combination of both. The NSDRC’s 11 group homes are all of similar age and require expensive repairs or renovations and the organization has thought about gradually divesting itself of the homes and transitioning to a new model of only condo homes, which should in theory have lower operating costs. However, decisions would need to be made prior to divesting homes as to how to address specific locations and the needs of the residents. The NSDRC has identified that they currently have no in-house expertise for redeveloping properties per the nature of the challenge.

The home at 951 Hendry Avenue in the District of North Vancouver is an example of the type of decision that needs to be made. The property is desirable from a number of perspectives, but is in need of repair. If the decision was made to keep the property, the challenge for the NSDRC would be how to best redevelop it. The questions the NSDRC has surrounding renovation and redevelopment include:

• Should the same foundation and home design be used?
• Should a completely new re-design be used with multiple stories and a suite?
• Should a laneway house be added to the property, and if so where should it be located?
• Should an extra suite be included in the main home to minimize construction costs?
• Can the property be redeveloped in stages in order to minimize construction and financing costs?
• If the costs of re-developing are too significant, should the property be sold now and the funds applied to maintaining other homes or purchasing condos to offset the loss of the Hendry suites?
Through discussion between representatives of the NSDRC and the ULI BC TAP team, the following six statements were formed to create the context for the challenge:

1. One of the major goals for the NSDRC is to increase the number of affordable and accessible units in North Vancouver for people with disabilities.

2. The centre has 11 group homes and all are of similar age and in need of expensive repairs or renovations.

3. The NSDRC has operating agreements with BC Housing, the first of which is set to expire in 2018. This means that more money is required to meet the operating costs of the organization.

4. The centre needs to find a path forward to a) increase the number of people that can be served and b) pay for the increase in operating costs.

5. NSDRC is willing to divest of some properties in order to meet these needs.

6. Principals of inclusion can determine models of housing.

### 1.2 QUESTIONS FOR THE PANEL

With the summary of the challenge understood and the context statements outlined, the following questions were presented to the Panel. These questions formed the basis for discussion and ultimately guided the brainstorming session with the understanding that the NSDRC would be provided with a breadth of insight and guidance moving forward.

**Big Picture Questions:**

- What is the best way to leverage existing land assets to generate capital to meet the NSDRC’s goal of increasing the number of units for clients?
- When the NSDRC is looking to purchase properties, what is the most cost effective form of housing on the North Shore that would meet the needs of NSDRC?

**Detailed Questions:**

- What are methods to generate long-term income to meet increasing operating costs?
- Are there other operational funding models available through BC Housing or another organization that would offset the increased operating costs?
- If properties must be divested to generate capital, what criteria should be used for selecting the properties to sell (e.g., property value, condition of structure(s), development potential/land use and zoning, tax rate)? 951 Hendry Avenue can be used as a prototype.
- If the NSDRC chose to re-develop the Hendry Avenue property, what would be the best housing option for this location? (e.g., 2 story with separate suite, 1 story with carriage house, etc.)

**Further Consideration Questions:**

- What options and/or advice has the Panel not addressed in answering the questions above that could benefit the NSDRC and its’ clients?
2.0 PROJECT BACKGROUND

2.1 LOCATION & SITE DESCRIPTION

2.1.1 Physical Location
951 Hendry Avenue, North Vancouver, BC
Area-Jurisdiction-Roll 08-316-080-0177-1000-6LTO
Number BB1509319
PID 014-266-423
Legal - Amended Lot 12 (See 387078L) Block 14 District Lot 553
Plan 1815

According to BC Assessment, the property is 11,025 square feet and the floor area of the house is 2,048 square feet. The lot is large at 75 feet (22.862 m) by 147 feet (44.821 m) with much of it unused by the current house design. The area is zoned single family residential with the only commercial businesses in the immediate area being corner stores. The location is desirable as it is close to Grand Boulevard, Lynn Valley, and Lonsdale Avenue with the related transit access and many services available. Sutherland High School is nearby and Brooksbank Elementary school is a reasonable distance away. The area is flat but near the Keith Road hill, which provides access to the Iron Workers bridge and Highway 1.

2.1.2 History Of The Site & Operating Agreement

According to the records of the District of North Vancouver, the home at 951 Hendry Avenue was constructed January 1st, 1948. The NSDRC purchased and renovated the home into a fully accessible space in 1983. The lot and the neighbouring lot were originally three legal lots that were combined into two larger ones. According to the District of North Vancouver, these properties are not large enough to sub-divide again, but they are large enough to permit a laneway home to be added. A new home has recently been constructed on the neighbouring property and so recombining the two lots back into three legal lots seems unlikely to happen.

The property has a clear title, but is covered by a BC Housing operating agreement, which was set up February 1st, 1983 and expires on April 30th, 2018. Currently, the property has a BC Housing restriction 506 Section 821 A – Disabled meaning that BC Housing can cancel the operating agreement and related subsidies if the home is sold before the operating agreement expires.
2.1.3 Property Value

The 2015 assessed value was $37,800 for the Hendry house and $1,031,000 for the land for a total of $1,068,800. The assessed value of the land had increased about $100,000 over the previous year and is expected to continue to show significant increases in the future due to the market desirability of the property. This was reflected in a further 20% increase in the assessed value for 2016 to $1,283,000 with the building decreasing to $28,300 and the land increasing in value to $1,255,000. These increases have resulted in ongoing property tax increases, however the District regularly waves these taxes because the NSDRC is a charitable organization. Also, BC Housing funds property tax payments.

2.2 ECONOMICS OF THE AREA

The subject property area could be considered middle class but the 2006 census indicated that the neighbourhood median household income was about $60,000 which was below the District average of about $77,000. Based on the construction of the current newer homes in the neighbourhood, the level of income has likely risen to higher levels over the last 10 years. According to the 2006 census, about 64% of the residents in the neighbourhood worked outside of the District of North Vancouver. The census also indicated that 86% of the residents of the neighbourhood were in the workforce, which was above the District average of about 80% with an overall District unemployment rate of about 5%.

2.3 DEMOGRAPHICS

Statistics Canada information from 2006 indicated a neighbourhood population of about 2,600 people. The percentage of people in the area speaking non–official mother tongue language was 17.6% in comparison to the District average of about 25%. The District population has 31% with university degrees with the most common profession being management and public administration for 24% of the working population between 25 and 64 years old. The District population is made up of 26% youth aged 0 to 19 years old, 60% middle aged 20 to 64 years old, and 13.5% over the age of 65. Updated demographic figures can be found in the Vancouver Coastal Health Authority Housing Vulnerable Populations on the North Shore Report dated June 2012.

“...committed to working towards a community which is free of physical, financial and attitudinal variables in response to the needs of persons who have disabilities, their families and their friends.” - NSDRC
2.4 HOUSING MARKET

As with many neighbourhoods on the North Shore of Vancouver, transition is taking place in the Hendry area as older homes are being replaced with newer and in most cases larger homes. Housing in general and rental units in particular are in short supply in the municipality. This especially applies to accessible and affordable housing, and the reason for such strategic importance to the NSDRC.

New towers are being developed in many areas of the North Shore with mall and town centres being some of the most active areas. Most of these developments are geared toward market housing, which is in high demand driving up prices and limiting access, and developers only include accessible housing in their developments due to municipal bylaws referring to community amenities and official community plans. Affordable housing is even more difficult to include due to the very hot real estate that has been in place for several years in the Lower Mainland. Turnover of existing properties is difficult to estimate, however most real estate listings sell quite rapidly due to high demand with some well above the asking price. This trend is expected to continue into the near future. Real estate transactions are considered to be somewhat of a high risk situation for the NSDRC and its’ housing plan in the short-term as the real estate market can change direction quickly due to unforeseen circumstances outside the immediate market area.

2.4.1 MLS Price Index

Sourced from the Real Estate Board of Greater Vancouver Home Price Index, Table 2.4.1 MLS Price Index provides a summary of the MLS Price Index as of June 2016 for North Vancouver:

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<thead>
<tr>
<th>Property Type</th>
<th>Area</th>
<th>Benchmark Price</th>
<th>Price Index</th>
<th>1 Month Change %</th>
<th>3 Month Change %</th>
<th>6 Month Change %</th>
<th>1 Year Change %</th>
<th>3 Year Change %</th>
<th>5 Year Change %</th>
<th>10 Year Change %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Residential/Composite</td>
<td>North Vancouver</td>
<td>995,400</td>
<td>224.6</td>
<td>4.2%</td>
<td>14.4%</td>
<td>20.5%</td>
<td>32.0%</td>
<td>52.7%</td>
<td>57.6%</td>
<td>86.7%</td>
</tr>
<tr>
<td>Single Family Detached</td>
<td>North Vancouver</td>
<td>$1,664,100</td>
<td>264.9</td>
<td>3.5%</td>
<td>17.0%</td>
<td>25.8%</td>
<td>41.4%</td>
<td>75.1%</td>
<td>81.6%</td>
<td>121.7%</td>
</tr>
<tr>
<td>Townhouse</td>
<td>North Vancouver</td>
<td>$850,200</td>
<td>203.5</td>
<td>6.5%</td>
<td>15.8%</td>
<td>20.9%</td>
<td>30.8%</td>
<td>46.7%</td>
<td>46.6%</td>
<td>72.8%</td>
</tr>
<tr>
<td>Apartment</td>
<td>North Vancouver</td>
<td>444,200</td>
<td>180.8</td>
<td>5.1%</td>
<td>10.2%</td>
<td>12.6%</td>
<td>19.9%</td>
<td>25.6%</td>
<td>29.4%</td>
<td>48.4%</td>
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2.5  GOVERNMENT

2.5.1  Provincial and Regional Governments
The main provincial government representative possibly involved in the redevelopment of the Hendry property would be BC Housing. The non-profit housing society has visited the property and advised that they may consider providing construction and/or mortgage financing. At the Federal Government level, CMHC has a program that may provide some small grants or loans to assist with the initial steps in the redevelopment process.

2.5.2  Local Government
The District government is receptive to the idea of redeveloping the property, including possibly adding a laneway house. However, the property cannot be sub-divided and changing the zoning to allow a duplex, for example, would require a public hearing.

2.6  PRIVATE SECTOR INVOLVEMENT
The NSDRC is not aware of any neighbourhood or community development associations that are active in the area. Financial institutions have not been approached regarding the Hendry property, with the exception of Vancity who visited the property and who were receptive to financing other real estate projects that the NSDRC was considering. The NSDRC may also decide to fundraise to fund some of the costs of redevelopment, although the plan has not been developed. A capital campaign or corporate sponsorships may be used for this purpose.
3.0 SITE TOUR AND DISCUSSIONS

3.1 WHAT WE HEARD FROM THE NSDRC & STAKEHOLDERS

The residents of 951 Hendry Avenue graciously opened their door to the NSDRC leadership team and the ULI BC TAP Panelist group to allow a tour of their home. Currently, three individuals occupy the four bedroom house. The TAP Panelists were able to get a feel for the space including a better sense of the condition and function of both the interior and exterior.

At the time that the Hendry House was renovated in 1983 to be a fully-accessible home, the model of ‘no more than four’ persons occupying a detached home in a neighbourhood consisting of mainly single-family homes was considered leading edge. Generally four persons with similar needs of support share a home with the NSDRC providing two careworkers (possibly three depending on need) who visit and support the residents during the course of two four hour shifts each day.

Today, this model of housing and level of care continues to be viewed as mostly successful by both residents and the organization alike.

Based on the discussions during the tour and a Q&A after the tour with four stakeholders and the NSDRC staff, the TAP Panelists heard several views regarding current liveability, wishes regarding future liveability, and challenges surrounding operational costs and individual needs for care. The group was fortunate to hear from two residents, Jim Burrows and Blyth Grimmett, both who shared stories related to their personal needs with insights directly related to the NSDRC properties.

Another perspective was heard by Marcie Williams - a mother of an adult autistic son who lives at his parent’s home. While Ms. William’s son does not have a physical disability requiring an accessible space, she brought a perspective related to highly individualized support requirements and need for inclusive and safe places to call home. Another important view was heard by Bob McCormack, an active North Vancouver resident who has participated on the board of the NSDRC since 2004. He brought insights to housing options, the real impacts of social issues, the need to not isolate, and the question about how ‘we all’ fit into the big picture.

The following page breaks down what the Panel heard in terms of non-financial and financial considerations. The collective Stakeholder and NSDRC views formed the basis of understanding and set the stage for the Panel recommendations that are detailed in Section 4.
“We recognize individuals for their abilities and contributions.” - NSDRC

3.1.1 Non-financial Considerations

- Non-institutional
  - Clients as individuals
  - Community integration
- 100% barrier free
- Flexibility – space
- Elevators often unreliable
- Service more people
  - Seniors
  - Families
  - More disabilities
- Control of client mix
  - Management issue
- Relationship of “core clients” with others
- 4 is the magic number
- Neighbourhood resources/accessibility is important
- Open to different service models
- Lack of internal resources for development management
- Attachment to small properties
- Resident resistance to moving
- Non-inclusive homes
- Lack of strong relationships with authorities/municipalities
- Relationship to other non-profits – Kiwanis/Lions…
- 4 communities serviced
- Parking

3.1.2 Financial Considerations

- Willingness to consider other financial models (private rep)
- Focus on funding gaps
- Ownership strongly desirable – limits options for structure
- Too many funders with different considerations
- See the services as long-term
- Long-term debt okay
- Life leases possible

3.1.3 Principles to Work From

Based on the tour and discussions with both Stakeholders and NSDRC staff, the Panel agreed on the following principals to guide deliberations:

- Expand number of client homes
- Maintain substantial ownership but sell existing properties where appropriate
- Move away from focus on single family homes
- Enhance primary focus on District of North Vancouver
- Balance need for client individuality with available choices
- Align fundraising strategies with service provision
4.0 PANEL RECOMMENDATIONS

The four key recommendations to address the NSDRC’s challenge of expanding affordable and accessible housing on the North Shore are noted below. The Panel’s recommendations are based on their knowledge and understanding of the challenge per the Briefing Book materials provided by the NSDRC, the tour of the Hendry property, and the perspectives of the Stakeholders. A collaborative five-hour brainstorm session took place on day two of the TAP with several big picture thoughts and ideas being discussed. Ultimately, it was the goal of the Panel to focus on suggestions that serve to address the questions posed to the Panel in a level of detail that NSDRC can refer to and realistically work to implement.

1. Create An Asset Management Plan
2. Intensify Selected Sites In Existing Portfolio
3. Hendry Asset Redevelopment Strategy
4. Develop Alliances

4.1 CREATE AN ASSET MANAGEMENT PLAN

The recommendation to develop an Asset Management Plan is based on the need for a systematic and coordinated approach to evaluate the NSDRC’s real estate assets, plan for the future, and assist in reviewing the merits of real estate opportunities when they emerge. An Asset Management Plan would provide the NSDRC with a methodology to build a thorough understanding of its real estate assets and develop a decision making framework to determine what to do with existing or future assets. This might include when to sell, renovate, or reposition (e.g. rezone, develop, subdivide, lease) an asset. In the context of this report, an “asset” is a house or an apartment unit owned by the NSDRC. Other assets such as vehicles or equipment are not included in this plan.

The TAP panel developed a decision making matrix and outlined a process that would form the basis of an Asset Management Plan. The decision-making matrix is primarily based on evaluation of criteria in three categories: Building condition; financial considerations; and suitability (related to the NSDRC’s objectives). Each criterion is evaluated and scored, with the score then being used to inform what action the organization should pursue. See Figure 4.1 Asset Management Decision Making Matrix.
### Figure 4.1 Asset Management Decision Making Matrix

<table>
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<th>CRITERIA</th>
<th>CONDITION</th>
<th>FINANCIAL</th>
<th>SUITABILITY</th>
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<tr>
<td>Building condition report</td>
<td>Net financial impact (Revenues – Costs)</td>
<td>Ability to serve clients needs</td>
<td>Rent revenues</td>
</tr>
<tr>
<td>Basic cost to operate (as is) – utilities, maintenance and property taxes</td>
<td>Neighbourhood – parks, walkable, transit</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### 4.1.1 Criteria 1 - Condition of the Asset

The NSDRC has a system in place that generates a building condition report on each residential unit. A condition report typically assesses physical structure such as the roof, walls, windows, doors, and electrical/mechanical systems (especially elevators if present). Property conditions such as sidewalks, ramps, balconies, and landscaping may also be included. This report is used to inform general maintenance upgrades and anticipate major expenditures to ensure the safety and comfort of the residents over time.

In the decision-making matrix, evaluation of this building condition report should be standardized to provide consistency across all properties. The NSDRC will need to establish a methodology to quantify the results of the building condition report – likely based on thresholds of performance translated into “good”, “satisfactory”, or “poor” ratings.

### 4.1.2 Criteria 2 - Financial Considerations

Financial considerations will be easier to quantify than the other criteria, and would be based on factors such as revenues received from rent and costs to own, operate, and maintain the home. The net financial impact is then categorized as “low”, "medium", or "high". As with the condition report evaluation, the NSDRC will need to determine what constitutes a “low” versus “high” financial impact. This scale could likely be established using the existing housing inventory as a baseline.
4.1.3 Criteria 3 - Suitability of the Asset

“Suitability” is a more subjective criterion that would be determined, in part, by assessing how well the asset meets the current and long-term objectives of the NSDRC from a real estate perspective. For example, are single-detached homes or apartment units preferred? Have market forces changed? Over time, these factors will affect the NSDRC’s real estate strategy and influence the perception of how suitable a particular asset is in terms of the entire portfolio. The suitability evaluation also includes an assessment of how well the home meets the needs of the current residents - a key factor. The health and safety of residents is a critical consideration, as is the overall quality of life that can be achieved in the home and the neighbourhood. External considerations such as access to transit, parks, and walkability also have a net positive impact on quality of life and the suitability of the home for its residents and their families, staff, and as an asset in the real estate portfolio. The NSDRC will need to identify the specific parameters they will use to define suitability, in order to ensure consistency in the evaluation of all assets.

4.1.4 Scoring the Criteria and Taking Action

The rating scale for each category will be ascribed a numeric value so that, once the criteria have been evaluated and an overall rating established for each of the three categories, a total score will be reached. The scoring system can be simple. For example, one point for poor and three points for good. The scoring can be made more complex and potentially more effective, by weighting the score for each criterion or category. For example, suitability of the home might be the most important factor in making decisions about a real estate asset, and should be weighted accordingly.

Once a final score for the asset is determined, a course of action may be more clear. For example, if the asset has a high score (is in great condition, is cost-effective, and suits the objectives of the NSDRC and needs of its’ residents) the appropriate action would be to maintain the asset. Should the score be below a certain threshold (to be determined by the NSDRC), it would be appropriate to consider selling, redeveloping, or taking some other action to improve the score or remove it from the asset inventory. A low score would trigger further investigation by the NSDRC or contracted assistance to conduct a highest and best use study to determine available options for the asset. See Figure 4.1.4 Action for a simplified version of the action tree.
An Asset Management Plan can be a simple tool or a complex formula for the NSDRC to use in understanding the inherent value of its assets and managing those assets. Whether it be simple or complex, the matrix should not be a static tool and should be updated to reflect the needs and objectives of the NSDRC as it evolves.

Figure 4.1.4 Action
4.2 INTENSIFY SELECTED SITES IN EXISTING PORTFOLIO

The site explored during the Panel deliberations is the Hendry property. The redevelopment of this site may be a precedent for other NSDRC properties and can inform future redevelopment. The aging 4-bedroom group home requires more maintenance as it ages, representing increased operational and maintenance costs for the NSDRC. Redevelopment presents the following positive opportunities:

- **The first opportunity** is to redevelop the site with an energy efficient modern home(s). A new home will require lower maintenance costs due to modern low maintenance building materials. A well-insulated air tight building envelope with energy efficient windows and energy efficient fixtures and lighting will reduce future operating costs for this property.

- **The second opportunity** is to set a precedent in Canada for accessible design. British Columbia is already a leader throughout Canada as it is one of few provinces providing independent living for people with disabilities. This redevelopment will be a great opportunity to provide well designed accessible living spaces with a lot of natural light and access to great outdoor areas for residents.

- **The third opportunity** is to move to a housing model that gently densifies the existing four-person group home model by providing a combination of market and non-market rental options, essentially supplementing operational costs and providing long-term flexibility.
4.2.1 Main House and Coach House

Design Option 1

This option comprises of an accessible single storey 4 bedroom group home and a 2 storey coach house to the rear of the site.
Advantages of Design Option 1:

- Built for purpose, energy efficient buildings will create a great living environment for residents.
- The open space between both homes creates a wonderful opportunity for an accessible deck, barbecue area, and accessible garden plots for the residents.
- The 2 storey coach house offers an opportunity to create a rental property for the NSDRC. Income can be derived from this property, which will offset development costs. (Note maximum size of a coach house in the District of North Vancouver is 968 sf without rezoning and a 2 bedroom coach house can rent for $2000-$2500 per month).
- More density on this site – ultimately the NSDRC could house 8 people with disabilities on the Hendry Property, doubling current resident capacity.

Disadvantages of Design Option 1:

- The two storey building is not accessible and would be difficult for the NSDRC to use in the future unless developed with an elevator.
- An elevator would increase building costs and take up floor area in the coach house.
- Renters would have to be vetted to ensure that there would be no conflict between NSDRC residents and renters.
4.2.2 Two - 4 Bedroom Units

Design Option 2

This option comprises an accessible single storey 4 bedroom group home and two single storey 2 bedroom units to the rear of the site via a breezeway.
Advantages of Design Option 2:

- Built for purpose, energy efficient buildings will create a great living environment for residents.
- The open space between both developments creates a wonderful opportunity for an accessible deck, barbecue area, and accessible garden plots for the residents.
- The two single storey 2 bedroom units connected to the main home via a breezeway offers an opportunity to create rental properties for the NSDRC. Income can be derived from this property, which will offset development costs.
- The two 2 bedroom development could be converted back into a 4 bedroom group home in the future for the NSDRC, meaning this opportunity gives the NSDRC flexibility.
- More density on this site – ultimately NSDRC could house eight people with disabilities on the Hendry Property, doubling current resident capacity. (Note the current District of North Vancouver Bylaw limits the number of unrelated individuals in a group home to eight. Six in care and two attendants).

Disadvantages of Design Option 2:

- Less outdoor space, renters would have to be vetted to ensure that there would be no conflict between NSDRC residents and renters.
- Existing zoning in the District of North Vancouver specifies maximum house size of 3013 sq ft and 35% site coverage, therefore rezoning is likely required.
4.2.3 Three - 4 Bedroom Units With Rezoning

Design Option 3

This option comprises of a three accessible single storey group homes.
Advantages of Design Option 3:

• Built for purpose energy efficient buildings will create a great living environment for residents.
• The open space between developments creates wonderful opportunities for accessible decks, barbecue areas, and accessible garden plots for the residents.
• One building offers an opportunity to create rental properties for the NSDRC. Income can be derived from this property, which will offset development costs.
• The rental development could be converted back into a 4 bedroom group home in the future for the NSDRC, meaning this opportunity gives the NSDRC flexibility.
• More density on this site – ultimately the NSDRC could house 12 people with disabilities and/or combination of subsidized and market rental on the Hendry Property, possibly tripling current resident capacity.
• BC Housing has funds to finance projects and to lower mortgage costs through taking an ownership or partial ownership position.

Disadvantages of Design Option 3:

• Less outdoor space, renters would have to be vetted to ensure that there would be no conflict between NSDRC residents and renters.
• This option would mean a rezoning process taking at least a year. There is no guarantee of success and the NSDRC might be unsuccessful in this endeavor.

It could be worth trying to rezone this property to gauge public reaction and reaction from the planning department. If rezoning was successful, the capacity of the site would be tripled and the rezoning could set a precedent for other NSDRC properties in North Vancouver.
4.2.4 High Density

Design Option 4

This opportunity is ultimately for an urban site with a higher FSR. It is a development that would most likely take place with a Church or charity in alignment with the NSDRC. The site would be the property of the partner Church or charity and/or City or District of North Vancouver. Under ownership with BC Housing is another option to consider.

This opportunity comprises a 4 or more storey apartment building with or without commercial space on the ground floor (possibly above new NSDRC office space) with a deck and resident facilities on the top floor.
Advantages of Design Option 4:

- Built for purpose energy efficient buildings will create a great living environment for residents.
- NSDRC can design and build their own units, meaning a high level of design that incorporates their experience in providing generous living spaces for people with disabilities. A number of options can be provided, apartments for 4 people, 3 people, or 1 bedroom units.
- The deck space on top of the development creates wonderful opportunities for party rooms, accessible decks, barbecue areas, and accessible garden plots for the residents.
- The commercial areas on the ground floor can offer an opportunity to create rental properties for the NSDRC. Income can be derived from the commercial properties, which will offset development costs.
- More density on this site – ultimately the NSDRC could house more people with disabilities in a high density development, increasing current resident capacity.
- Focusing of resources - it could make running the units easier if they are all located in one building.
- If the high density development takes place with a Church or partner charity there is potential for the NSDRC to share resources.

Disadvantages of Design Option 4:

- Less control, the NSDRC will have to work with a partner.
- The NSDRC will have to find a partner and or a site, and this may take longer than re-developing existing properties.
- The NSDRC will have to develop and run a larger building, and this will mean training of staff.

4.2.5 For Further Consideration

Renovation/Addition

The TAP Panel did not specifically consider the option of renovating the existing home, however this is an option for the NSDRC. Assuming that $300,000+/- could build two more bedrooms, fix the layout and structural issues, then the new mortgage could be partially supported by additional rent received (assuming 2x $375/month x 12 = $8,400 annual revenue.

It may be worth exploring whether or not an addition to and renovation of the Hendry House is feasible and financially viable. This lot is large enough to accommodate the entire 3013 square feet of permitted development in a single storey which would allow a modest expansion to the number of clients served and could possibly be designed in such a way as to provide some “upscale” accommodation (i.e. ensuite bathrooms) for those who can afford to pay rent more in line with the market. Alternatively, and depending on municipal reaction, a demolition and rebuild of a new 3,000 square foot single family dwelling with basement suite for staff could be designed and built to accommodate up to 9 clients. The cost of this addition or re-development should be recoverable through the increase in rents from the 2 to 5 new clients being served at this location.
4.3 HENDRY ASSET REDEVELOPMENT STRATEGY

Focusing on the Hendry site, this section will compare the “Keep Asset” Scenario, a redevelopment plan for the property versus a “Sell Asset” Scenario, a reinvestment plan that liquidates the Hendry property with a strata unit purchase plan. Both scenarios will assume a land value of $1.6M as initial equity held by the NSDRC with a $1M investment and compare the effects of increasing the NSDRC’s inventory.

4.3.1 Keep Asset Scenario

Scoping out the Redevelopment

The “Keep Asset” scenario, summarized in Table 4.3.1 presents a model where the NSDRC would seek to expand the current facilities at the Hendry site under its current land use. At $1M, the scope would be limited to the creation of 8 bed units (2 x 2 beds plus 1 x 4 bed pods) with shared lounge, amenity, dining, and bathing areas.

Market Condition

The Panel has assumed that fully accessible ground-orientated units located within a residential neighborhood is scarce on the North Shore. As such, and in combination with the services and supports provided by the NSDRC to these units, the NSDRC could charge $1,325 per unit per month (PUPM) for rental of these bed units.

The “Keep Asset” scenario is predicated on the concept of rent mixing where deeply discounted rents for individuals who are only able to contribute the maximum shelter contribution under the Provincial Disability Assistance Rate4 at $375 PUPM (PWD) are effectively subsidized by units of higher rents (Affordable Rental Units). The goal of this review is to determine the mix of PWD Units to the Affordable Rental Units.

Cost Assumptions

Assuming that the NSDRC would qualify for BC Housing’s current financing program Community Partnerships Initiative (CPI), and based on June 2016 posted rates for long-term financing, the NSDRC’s annual mortgage would be $48,000. Estimated operational costs would be $33,600 (as provided by NSDRC) for a total annual total expense estimate of $81,600.

Summary

Primarily constrained by land use regulation, the NSDRC’s initial investment of $1M ($250,000/bed unit) would only increase by 4 units, for a total of 8 units.

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BC Housing’s Community Partnership’s Initiative: BC Housing partners with municipalities, non-profit societies and other community groups to implement innovative strategies that create more affordable housing for British Columbians in greatest need. The Community Partnership Initiatives arranges mortgage financing for housing solutions, without the need for ongoing operating subsidies.

Through the program, BC Housing provides advice, referrals to partnership opportunities and arranges construction or long-term financing for non-profit societies to create self-sustaining, affordable housing developments. BC Housing’s capacity to arrange financing with favourable terms is the cornerstone of the program. To date, the Community Partnership Initiatives program has contributed to over 3,300 new units of affordable housing. This achievement is a testament to the importance of partnerships, particularly with the non-profit housing sector. For more information: [http://www.bchousing.org/Initiatives/Financing/CPI](http://www.bchousing.org/Initiatives/Financing/CPI)
Table 4.3.1 Keep Asset Scenario

<table>
<thead>
<tr>
<th>Estimated Project Cost</th>
<th>$2,600,000</th>
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</thead>
<tbody>
<tr>
<td>Land Value</td>
<td>(1,600,000)</td>
</tr>
<tr>
<td>Mortgage Required (BC Housing – CPI)</td>
<td>1,000,000</td>
</tr>
<tr>
<td>Total # Bed Units Created</td>
<td>8</td>
</tr>
</tbody>
</table>

**EXPENSES**

| Annual Mortgage Payment (BC Housing – CPI) | $48,000 |
| Operations and Maintenance               | $33,600 |
| **Total Estimated Annual Expenses**       | $81,600 |

**Summary of Expenses**

| Cost/Unit/Year | $10,200 |
| Cost/Unit/Month | $850 |

**REVENUE**

**Revenue Assumptions - Affordable Rent**

| Market Rate (PUPM) | $1,325 |
| % of Purchased Units (Unit Mix) @ Affordable Rent Rate | 50% |
| **Total Estimated Revenue From Affordable Rent (4 Units)** | $63,600 |

**Revenue Assumptions - Disability Assistance Rent: Persons with Disabilities (PWD)**

| Disability Assistance Rent | $375 |
| % of Purchased Units (Unit Mix) @ Disability Assistance Rent (PWD) | 50% |
| **Total Estimated Revenue From Disability Assistance Rent (4 Units)** | $18,000 |

**Total Estimated Annual Revenue (All Sources)**

| $81,600 |

**SUMMARY**

| Total Revenue | $81,600 |
| Total Expenses | $81,600 |
| Surplus | $0 |

**Unit Mix**

| Affordable Rental Units | 4 |
| Disability Assistance Rental Units | 4 |
| **Total Units** | 8 |

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3Disability Assistance Rate | Persons With Disabilities (PWD) – Based on Province of BC Disability Assistance Rate Table, Shelter Maximum for 1 Bedroom unit (effective Jun 1, 2007) - [http://www2.gov.bc.ca/gov/content/governments/policies-for-government/bcea-policy-and-procedure-manual/bc-employment-and-assistance-rate-tables/disability-assistance-rate-table]

4BC Housing’s Community Partnerships Initiative (CPI) will require that Operating Budgets report out at a debt coverage ration (DCR) of no less than 1.1 in most cases. This exercise is for illustrative purposes only. Detailed financial analysis will be required to ensure that all budgeted operations and debt servicing scenarios meet or exceed CPI program requirements for qualification.
4.3.2 Sell Asset Scenario

Leveraging for Additional Purchasing Power

The “Sell Asset” scenario assumes net proceeds from the sale of the Hendry property at $1.6M as initial capital with the intention to reinvest in new real estate purchases. The NSDRC could lever this equity to increase their purchasing power for new units to be included in the NSDRC portfolio. Assuming that the NSDRC would qualify for BC Housing’s current financing program Community Partnerships Initiative (CPI)\(^1\), and based on June 2016 posted rates for long-term financing, the NSDRC’s purchasing power could be increased by $1M to $2.67M. Assuming the maximum amortization of 35 years under BC Housing’s CPI program, the annual mortgage payment would be $48,000/year.

The “Sell Asset” scenario is predicated on the concept of rent mixing where deeply discounted rents for individuals who are only able to contribute the maximum shelter contribution under the Provincial Disability Assistance Rate at $375 PUPM (PWD) are effectively subsidized by units of higher rents, and ideally higher rents that are still below the market rental threshold (Affordable Market Rental Units). The goal of this review is to determine the mix of PWD Units to the Affordable Market Rental Units. The summary as detailed below is represented in Table 4.3.2 Sell Asset Scenario.

Current Market - 1-bedroom Apartment Strata Units

It is assumed that the NSDRC would be seeking to purchase built and/or available (pre-sale) apartment strata product as opposed to developing and constructing these units directly. Ideally, units would be in close proximity to each other to maximize facilities management and services delivery. In every case, the location of units in proximity to services, transportation, employment and community amenities would be paramount to ensure possibility of successful integration in the broader community and the maximization of independence by any prospective tenant.

Starting from the most conservative perspective of the NSDRC paying full market ($650/sq.ft.), and averaging 650sq.ft. for a 1 bedroom strata apartment unit, the estimated average market price is $422,500/unit.

It is further assumed that the current market rental rate for a 1-bedroom apartment on the North Shore is $1,600 PUPM. For this exercise, it is assumed that the Affordable Market Rental Units are charged out at 90% of market being $1,440.
Cost Assumptions

Annual Mortgage Payment - as per the above, the assumed long-term financing (mortgage) costs as facilitated by BC Housing’s Community Partnerships Initiative, yields an annual mortgage cost of $48,000/year.

Strata Payment - For the purposes of this exercise, strata maintenance fees are assumed at 35% of market value of the unit ($650/unit), yielding $2,730/year or $228/mo.

Insurance & Property Taxes - For the purposes of this exercise, insurance & property taxes are assumed at a cost of $2,000/unit per year or $167/unit per month.

Operations - Based on information provided as a $1,200/unit per year or $100/unit per month to provide minimal supports to residents.

Misc. - Based on $1,000/unit per year or $83/unit per month to account for additional operating or expenses incurred by the NSDRC.

Looking at the Options

Option 1: Market Purchase

Reading the scenarios in columns, the first and far most left column represents the most conservative case, the NDSRC could afford to purchase 6 strata units. Running at an annual cost of $89,580, the mix would yield 5 Affordable Market Rental Units and 1 Disability Assistance Rental (PWD) Unit.

Options 2 thru 4 assumes that NSDRC could benefit from any combination of direct developer negotiations; municipal policy; the District of North Vancouver Affordable Housing Fund program; or available BC Housing grant programs to drive down the purchase price of a typical 1-bedroom unit, effectively increasing the purchasing power of the NSDRC. To illustrate how this benefits the NSDRC, these inputs have been simplified as an effective discount to the purchase price. Any discounts could result in a reduced rent, however for the sake of maximizing the NSDRC inventory, the discounts in these options were correlated to the increase in the unit mix of PWD units to Affordable Market Rental Units with the efforts to increase percentage of PWD units across the newly purchased inventory.

Option 2: 25% Discount

At an effective discount of 25%, the total number of new units that could be purchased is 8, comprised of 5 Affordable Market Rental Units and 3 PWD Units.

Option 3: 50% Discount

At an effective discount of 50%, the total number of new units that could be purchased is 13, comprised of 6 Affordable Market Rental Units and 7 PWD Units.

Option 4: 75% Discount

At an effective discount of 75%, the total number of new units that could be purchased is 25, comprised of 9 Affordable Market Rental Units and 16 PWD Units.
Table 4.3.2 Sell Asset Scenario

<table>
<thead>
<tr>
<th>Funds From Sale of Property</th>
<th>$1,600,000$</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Leverage Capacity</td>
<td>40%</td>
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<tr>
<td>Total Funds Available for Purchase of Units</td>
<td>$2,666,667</td>
<td></td>
</tr>
<tr>
<td>Estimated average MARKET COST (1 Bed @ 650sq.ft x $650/sf)</td>
<td>$422,500</td>
<td></td>
</tr>
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</table>

<table>
<thead>
<tr>
<th>DISCOUNT OF MARKET COST</th>
<th>OPTION 1</th>
<th>OPTION 2</th>
<th>OPTION 3</th>
<th>OPTION 4</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0%</td>
<td>25%</td>
<td>50%</td>
<td>75%</td>
</tr>
<tr>
<td>Calculated Cost of 1bed Unit to NSDRC</td>
<td>$422,500</td>
<td>$316,875</td>
<td>$211,250</td>
<td>$105,625</td>
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<tr>
<td>Total Possible Purchases (# of Units)</td>
<td>6</td>
<td>8</td>
<td>13</td>
<td>25</td>
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</table>

**EXPENSES**

<table>
<thead>
<tr>
<th></th>
<th>OPTION 1</th>
<th>OPTION 2</th>
<th>OPTION 3</th>
<th>OPTION 4</th>
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</thead>
<tbody>
<tr>
<td>Annual Mortgage Payment (BC Housing – CPI)$</td>
<td>$48,000</td>
<td>$48,000</td>
<td>$48,000</td>
<td>$48,000</td>
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<tr>
<td>Strata Maintenance Fee</td>
<td>$16,380</td>
<td>$21,840</td>
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<td>Insurance &amp; Property Taxes</td>
<td>$12,000</td>
<td>$16,000</td>
<td>$26,000</td>
<td>$50,000</td>
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<tr>
<td>Services Subsidy (to NSDRC)</td>
<td>$7200</td>
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<td>$30,000</td>
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<tr>
<td>Misc.</td>
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<td>$8,000</td>
<td>$13,000</td>
<td>$25,000</td>
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**TOTAL ESTIMATED ANNUAL EXPENSES**

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<td>OPTION 1</td>
<td>OPTION 2</td>
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<td>OPTION 4</td>
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<td></td>
<td>$89,580</td>
<td>$103,440</td>
<td>$138,090</td>
<td>$221,250</td>
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</table>

**Summary of Expenses**

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<tr>
<th></th>
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<tbody>
<tr>
<td>Cost/Unit/Year</td>
<td>$14,930</td>
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<td>Cost/Unit/Month</td>
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<td>$1,078</td>
<td>$885</td>
<td>$738</td>
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$Funds From Sale of Property - Assumed value based on NSDRC provided appraisal information (c. 2016).
Table 4.3.2 Sell Asset Scenario, cont’d.

<table>
<thead>
<tr>
<th>DISCOUNT OF MARKET COST</th>
<th>OPTION 1</th>
<th>OPTION 2</th>
<th>OPTION 3</th>
<th>OPTION 4</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>0%</td>
<td>25%</td>
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<tr>
<td>REVENUE</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Revenue Assumptions - Affordable Market Rent (90% of Market)</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Market Rate (PUPM)</td>
<td>$1,600</td>
<td>$1,600</td>
<td>$1,600</td>
<td>$1,600</td>
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<tr>
<td>% of Market Rate Charged</td>
<td>90%</td>
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<td>90%</td>
<td>90%</td>
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<tr>
<td>Calculated Affordable Market Rent Rate (PUPM)</td>
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<td>$1,440</td>
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<tr>
<td>% of Purchased Units (Unit Mix) @ Affordable Market Rent Rate</td>
<td>82%</td>
<td>66%</td>
<td>48%</td>
<td>35%</td>
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<td>Total Estimated Revenue From Affordable Market Rent</td>
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<td>$91,238</td>
<td>$107,827</td>
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</tr>
<tr>
<td>Revenue Assumptions - Disability Assistance Rent</td>
<td>Persons with Disabilities (PWD) Units</td>
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<td></td>
<td></td>
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<tr>
<td>Disability Assistance Rent</td>
<td>$375</td>
<td>$375</td>
<td>$375</td>
<td>$375</td>
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<tr>
<td>% of purchased units (Unit Mix) @ Disability Assistance Rent (PWD)</td>
<td>18%</td>
<td>34%</td>
<td>52%</td>
<td>65%</td>
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<td>Total Estimated Revenue From Disability Assistance Rent</td>
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<td>Total Estimated Annual Revenue (All Sources)</td>
<td>$89,878</td>
<td>$103,478</td>
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<td>SUMMARY</td>
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<tr>
<td>Total Revenue</td>
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<td>$138,247</td>
<td>$222,728</td>
</tr>
<tr>
<td>Total Expenses</td>
<td>$89,580</td>
<td>$103,440</td>
<td>$138,090</td>
<td>$221,250</td>
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<tr>
<td>Surplus$7</td>
<td>$298</td>
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<tr>
<td>Unit Mix</td>
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<td>Affordable Market Rental Units</td>
<td>5</td>
<td>5</td>
<td>6</td>
<td>9</td>
</tr>
<tr>
<td>Disability Assistance Rental Units</td>
<td>1</td>
<td>3</td>
<td>7</td>
<td>16</td>
</tr>
<tr>
<td>Total Units</td>
<td>6</td>
<td>8</td>
<td>13</td>
<td>25</td>
</tr>
</tbody>
</table>

6Disability Assistance Rate (Persons With Disabilities (PWD))– Based on Province of BC Disability Assistance Rate Table, Shelter Maximum for 1 Bedroom unit (effective Jun 1, 2007) - http://www2.gov.bc.ca/gov/content/governments/policies-for-government/bcea-policy-and-procedure-manual/bc-employment-and-assistance-rate-tables/disability-assistance-rate-table

7BC Housing’s Community Partnerships Initiative (CPI) will require that Operating Budgets report out at a debt coverage ration (DCR) of no less than 1.1 in most cases. This exercise is for illustrative purposes only. Detailed financial analysis will be required to ensure that all budgeted operations and debt servicing scenarios meet or exceed CPI program requirements for qualification.
4.4 DEVELOP ALLIANCES

This section speaks to the strategy of working with aligned organizations and levels of government to create new developments which serve the NSDRC’s clients. These may be small in scale or large and integrated with other services and offerings.

4.4.1 Short-term (3-6 Months)

Board Leadership and Strategy Direction

In the short-term, strategic direction is required to frame opportunities in alignment with the NSDRC’s mission and vision. Working with the Board, the parameters for government funding, private funding, and development partners will be determined. These parameters will serve as the riverbanks so that the development teams are exploring opportunities supported by senior leadership.

Examples of such parameters may be:

• We will partner with organizations which serve those with physical or intellectual disabilities, but not those with mental health or addictions issues.

• We will seek funds from all levels of government, so long as the ownership of the assets is maintained in the name of our organization.

• We will seek funds from private donors, so long as they are not from companies involved in the production or distribution of tobacco, alcohol, or armaments.

The direction from the Board with regards to acceptable opportunities may be detailed or high-level, depending on the strategic vision for the organization and the values held. Having this direction in advance ensures the project teams are not expending time and effort on opportunities that will not be supported.

Staff Capacity (Real Estate Expertise, Risk Management, Finance)

Internal staff capacity for administering development projects may be limited at this time and a gap analysis should be undertaken to determine the required skill sets compared to existing staff capacity. The skills required to manage and administer development projects are different from program and operations management. The NSDRC will also need to consider the ability of existing staff to absorb the extra duties. Even if staff have the skills required, they may not have time.

Examples of particular skills which may be required, depending on the scale of the envisioned development include:

• Project management

• Construction and development

• Finance

• Risk management

If development activity is expected to be part of the NSDRC going forward, the organization may need to bring a development manager in-house to manage the development teams.
Consultant Roster

To assist in the development activities going forward, the NSDRC will need specialized expertise. These services will be needed on an ad-hoc basis, so you would not bring them in as employees. Examples of the consultant support you may need include:

- Real estate appraisers
- Surveyors
- Engineers in various disciplines
- Architects
- Development consultants
- Planners

Prior to commencing any development projects, the NSDRC will want to establish pre-approved lists of the services that will be needed. This will save time once a project is started, and will ensure that the NSDRC can respond quickly and effectively to opportunities.

Developing your consultant lists may include a formal proposal call process, or the organization may canvas your networks for names of consultants that may be included on your list. It is recommended that the NSDRC meet with these consultants to ensure compatibility. The NSDRC will also want to receive documentation regarding their services and charge-out rates for future reference.

Decide What You Want To Get (Suite Types, Location, Client Needs, etc.)

As the NSDRC moves forward with opportunities, it is important to settle on what it is that you need your development activities to deliver. Decide on suite types for future developments, suite mixes within buildings, the configurations of the suites and the building, and the preferred locations of the buildings. If the NSDRC chooses to replace an existing asset, such as the Hendry property, evaluate what the asset would be replaced with and where (existing site or new property). Bear in mind operational funding and any constraints that are imposed by those parties. Be prepared to explore a range of opportunities and configurations.

Meet With Partners, Introductions With Municipal Staff, Developers, Not-for-Profit Societies

Once the NSDRC has an idea of what the organization wishes to achieve from any development activities, it is time to build some relationships. This will include meetings with allied organizations that may be potential partners. NSDRC staff will also want to meet with municipal staff to determine whether there are opportunities within the municipal development process. Developers are also good partners, and may be amenable to providing units at reduced cost in exchange for benefits from the municipality. They may also be able to provide insights into the market. There is a range of allied not-for-profit groups who may be helpful in the advancement of development projects, and these groups should be contacted for preliminary conversations to determine the partnership appetite, funding sources, land availability, and the alignment of values and vision.
Identify Key Partners For Next Steps

Initial meetings should have identified not-for-profit groups that are particularly aligned in terms of mission, or those who are able to be of assistance going forward. Moving forward you may find it helpful to bring these groups to your meetings, and develop joint proposals for funding and support.

4.4.2 Mid-term (3-12 Months)

Public Meetings With Municipal Task Force, At Their Behest

In a subsequent section, the Panel recommends the creation of a Municipal Task Force to support housing on the North Shore. Once this group is established, ensure that the NSDRC is prominent in their meetings and working groups. This group is envisioned to bring the issue of housing and zoning for group homes to the forefront with policy makers, and you want to have your voice heard at this table.

Develop Joint Operating Frameworks With Partners

Working with prospective not-for-profit partners, develop guiding principles and operating frameworks for the pursuit of opportunities and eventual development activities. These frameworks will outline roles and responsibilities as the organization moves forward so that parties understand their level of participation and obligations to the partnership. These frameworks will also include financial obligations moving forward, and will outline contribution expectations, cost sharing parameters, and structures. In these documents the NSDRC will want to discuss and note the process for dissolution of the partnership; addressing this at the early stages will save effort and stress in the future. Some items for articulation include:

- Decision making
- Governance
- Roles and responsibilities
- Financial participation
- Operational considerations
- Tenant populations
- Approved funding sources
- Public communications
- Development expectations
- Physical space requirements

These frameworks are not intended to replace legally binding contracts, which would be required once a project is initiated. Rather, they are to firmly establish the intentions of the parties and what each can bring to the partnership.
Using joint frameworks with partners, the NSDRC can move forward together or separately to pursue opportunities. Having a strong and cohesive voice advocating for services in the community is important to bring issues to the forefront and provide needed visibility to gaps in the service continuum.

Partners from the public realm may not be willing to engage to this level of detail, but it remains important to establish with them a rapport for future opportunities. This engagement early in the process ensures that the NSDRC understands their requirements in advance, and are bringing to them opportunities that meet their funding criteria. They are also able to refer you to programs or opportunities that they become aware of in the future.

Partners from the real estate or development community may similarly not be able to author documentation around relationships until a specific opportunity arises, but it is important to have an understanding of their needs and requirements for future engagement. Through relationships, the NSDRC may be able to position itself for future opportunities.

**Risk And Reward Structure With Partners**

The structure with partners will include measures and management of risk and reward. At the early stages, the discussion will centre on what the acceptable level of risk is for each participant and who is responsible for what kind of risk. As projects are evaluated, this evaluation becomes more granular and more specific to the individual opportunity. Similarly, the reward structure is important to discuss and document early in the partnership. This relates to the disbursement of operational surpluses or accumulated equity in the project over time. Particularly as it relates to land ownership and legal titles, the advice of a lawyer may be required to ensure documentation reflects current and future reward expectations.

**Lobbying Campaign For Opportunities**

Using joint frameworks with partners, the NSDRC can move forward together or separately to pursue opportunities. Having a strong and cohesive voice advocating for services in the community is important to bring issues to the forefront and provide needed visibility to gaps in the service continuum. Based on previous work with the Municipal Task Force and the organization’s partners, the NSDRC will have a higher visibility for your constituents and will be able to bring forward opportunities that have been acknowledged under this structure. The NSDRC will also have a forum to have opportunities presented to the organization for exploration.

Lobbying efforts can be general, with the goal to raise awareness of the need for expanded services, or they can be specific in support of a specific development or policy. The approach would be different for each, however the relationships developed earlier in this process will be instrumental in advancing any initiative.
Lobbying Campaign For CAC Directives Towards Housing

A specific aspect of lobbying is for the use of Community Amenity Contributions (CACs) directed at housing. Currently CACs are retained from the municipal development process, however the direct reinvestment in housing related amenities is not demonstrated. An avenue for increased investment in housing, particularly housing for those in need, is the direction of the CACs towards housing related activities. Through activities with the Municipal Task Force and partnerships, the NSDRC is in a position to voice the need for a more direct relationship between CAC revenue and housing investment at the municipal level. This is a particularly important campaign and could potentially create significant opportunity for the creation of housing.

Maintain Engagement With Partners To Pursue Opportunities

The work completed to forge relationships with government, developers, and fellow non-profit service agencies needs to be maintained for long-term success. Maintain contact with these groups or individuals over time. The NSDRC should be in regular contact with key partners to discuss ongoing and future joint opportunities. Remain at the forefront of the issue of housing for those the organization serves and ensure partners are having this conversation with you.

4.4.3 Long-term (12 Months Plus)

Respond To BC Housing Proposal Calls

BC Housing often issues proposal calls to non-profit housing providers who wish to develop additional housing in their community. Either on your own, or with your partners, the NSDRC may wish to submit on proposal calls for a specific opportunity. The frameworks developed previously with partners will assist in making that determination, and then in managing the response effort and cost required. The NSDRC’s wider network of partners may prove crucial in this response as well, either through letters of support from municipal authorities, the identification of suitable lands, or the expertise offered by the real estate and development community.

Currently, BC Housing has the Provincial Investment in Affordable Housing, an annual proposal call for affordable housing projects across the Province. It is a capital-based program to support the construction of housing for those with low incomes. Operational subsidy is not offered, however if there is an alternative operational funding source then the programs can be combined in the one project. They also have a Community Partnership Initiative, as noted in Section 4.3 Hendry Asset Redevelopment Strategy, which offers assistance with financing and development soft costs for affordable housing. These are two of their current programs that are worth exploring. New programs are announced on occasion, and through the organization’s relationships with BC Housing and other partners the NSDRC may be well positioned to take advantage of them.
Units integrated within a larger market development may be well suited to lower needs tenants where care is not as intensive and behaviours may be better suited to a mixed environment. Stand alone developments may be better suited to tenants that require higher level of care.

**Work With Developers To Develop Sites**

The relationships cultivated with developers will position the NSDRC well to be engaged early in the development process to create or capitalize on units that are tailored to persons with disabilities. These may be encouraged through the development application process with the municipality, or created to meet the NSDRC’s design criteria and available at market rates. The development approval process offers a unique opportunity to secure units that meet the needs of the NSDRC at discounted values. The Municipal Task Force can influence the decisions around the provision of community amenities including housing for those in need. Being at the table early in that decision making process means that the NSDRC can be a partner in that development initiative and have early insight into such opportunities.

**Work With Municipality To Disburse CACs On Identified Projects**

As municipal partners refine their CAC distribution criteria to focus on housing needs in their community, the NSDRC can help identify worthy projects for investment. The relationship with the Municipal Task Force can allow the organization to guide the selection process towards inclusive projects. Take advantage of the early position in the development of the CAC discussion by proposing selection criteria and the definition of qualified projects for funding. As the NSDRC advances with partners towards a development project, approach the municipality for funding and support.

**Coordinate Client Selection For Available Units**

As units are developed, either as a standalone development or within a larger project, the selection of tenants becomes important. The level of integration within a larger development and the characteristics of the other occupants require consideration to ensure a hospitable building culture. The level of care required and the behavioural tendencies of the proposed tenants may dictate the kinds of developments that the NSDRC participates in. For example, units integrated within a larger market development may be well suited to lower needs tenants where care is not as intensive and behaviours may be better suited to a mixed environment. Stand alone developments may be better suited to tenants that require higher level of care.

When working with other non-profit partners to create housing, the mix of tenants from each group requires the same kind of consideration and coordination. The NSDRC tenants may have particular needs that do not blend well with other kinds of needs. This would be identified previously in the framework discussions.
4.4.4 Working With the District of North Vancouver

Enhanced Clout at District of North Vancouver

The District of North Vancouver (DNV) represents the most immediate municipality to focus on building relationships with. The majority of NSDRC group homes are located within the DNV boundaries and the municipality has already supported the NSDRC to purchase 10 new condominiums at a discounted rate. While the DNV is already aware of the NSDRC and has shown to be supportive of the mandate, it is believed that the NSDRC needs to strengthen relations at the District in order to increase the potential benefits that could be created.

Depending on the strategic approach the NSDRC decides to take to expand its level of service in the housing sector, a number of municipal constraints will need to be overcome and a number of opportunities realized. Until recently all of the organization’s housing stock were group homes located in single family zoned neighbourhoods. This limits the ability to significantly expand the number of new units on these properties due to the challenge of enlarging those dwelling units through additions and renovations or to successfully rezone these individual properties to higher densities such as duplex, triplex, or apartment. One of the important benefits of strengthening the NSDRC’s relationship with the DNV would be to support the DNV in revising blanket zoning policy to support redevelopment and density on group home sites.

While the municipality has recently adopted policy that allows coach houses, the conditions under which this type of development is allowed is restrictive. The lot must be 10,000 square feet or over in size or be on a lot 50 feet or wider with service from a lane or flanking street and have unrealized density available with which to construct the new coach house. Furthermore, the maximum size of the coach house is limited to 968 square feet. While only the Hendry House property was examined for this TAP, it is safe to assume that few, if any, of the other NSDRC properties would meet the criteria to allow additional coach houses on these existing group home sites.

The only exception to this situation, may in fact be the Hendry House, which is situated on a large lot (11,000 s.f. +/-) with a smaller house that could allow the unrealized square footage to be developed as a new coach house or as an addition to the existing house. Either action could increase the number of clients housed at this location. There is however another problem in that the municipality’s definition of “Family” limits a dwelling to 6 clients in care and 2 staff in a group home setting. While an exception to this definition was recently made it was done so in a way to clearly indicate that the Council did not consider this increase to 9 clients as precedent setting. Perhaps further discussions with municipal staff could clarify this situation. It should also be noted that current coach house regulations require the owner to occupy either the main dwelling or the coach house and that the coach house cannot be sold as a separate unit.
Now is an opportune time to strengthen relationships with DNV staff and Council. Planning staff and District Council have been engaged in a year long discussion about affordable and rental housing in the municipality. The level of understanding by the local politicians about local housing challenges has never been higher and on July 26th, 2016 DNV Council adopted the following resolutions:

**Recommendation:**

- **THAT staff be directed to amend the Draft Rental and Affordable Housing Strategy based on input received from Council, and return the Strategy to Council for consideration;**
- **AND THAT staff be directed to report back on appropriate steps to seek partnerships and grants to develop the District owned land on the 1500 Block of Oxford Street for family-oriented affordable housing;**
- **AND THAT staff be directed to report back on appropriate steps to sell District owned single-family lots, the proceeds to be used to acquire lands in Centres to develop affordable housing.**

A review of the Planning staff report does clearly indicate that while Council’s level of understanding of housing issues has increased, they were not able to achieve a high degree of consensus on what to do to solve these housing issues locally. Notably, Council failed to direct a specific portion of Community Amenity Contributions collected from new development requiring rezoning into an Affordable Housing Fund or to recognize that most non-profit organizations cannot afford to purchase new apartment units even at discounted prices as the $375/month barely covers strata fees and taxes.
Council does want more information on the housing needs by specific categories (i.e. seniors, people with physical or mental disabilities etc.) and wants to discuss further what level of affordability they should be targeting. While Council wants to continue project by project negotiations with developers, which pits affordable housing against the needs for all other public physical amenities required when building new town and village centres, they are now willing to provide additional municipal land for lease and do want to work with non-profit partners and senior levels of government to develop affordable housing projects. The staff report notes their intention to report back to Council on many of the affordable housing issues, which Council could not come to significant agreement on so this is the ideal time to suggest to the DNV Council directly that staff be authorized to form an Affordable Housing Task Force.

Create Task Force with DNV Staff and Political Representation and Other Non-Profits

Creating a Task Force with DNV staff and members of council is considered an effective way to push for additional resources to be directed to the NSDRC. This collaboration should help to identify more opportunities for the NSDRC to increase its mandate. Key to this will be being proactive in creating or identifying opportunities at the early stage in order to maximize the potential for the NSDRC. The Task Force will need to include a broad array of local non-profits and the NSDRC should take a lead role in bringing these other NPO’s and housing advocacy groups like the Community Housing Action Committee (CHAC) together to encourage the Council to form this advisory. One of the products of this Task Force could be to develop a list of Council pre-approved non-profits to be provided to developers so that new projects come forward with some kind of affordable housing already included.

Willing Politicians

Over the past year, DNV Councillors have become more familiar with the challenges faced in trying to address affordable housing in the municipality. A review of the video recordings of several of the Council workshops held on this subject over the past 6 months will help identify those elected officials that are most likely to support the formation of an Affordable Housing Task Force.
Align With DNV Housing Policy

So long as the NSDRC remains based in single family group homes, the organization would benefit by seeking a general text amendment to the definition of ‘Family’ in the Zoning Bylaw so that more clients could be accommodated in the existing homes. This would require a discussion with District staff as a first step in seeking this change.

The DNV’s Official Community Plan (OCP) does align with the organization’s goal to provide affordable housing for people with disabilities and the OCP has identified and focuses new development on two town centres and two village centres. This pattern of development is very compatible with the needs of people with disabilities who generally want or need to be close to services and transit. Getting involved in the development process early is key.

Consider Future Acquisitions in the City of North Vancouver and The District of West Vancouver as Opportunities Occur

While the District of North Vancouver presents some of the most immediate opportunity, the NSDRC should also consider potential opportunities in the City of North Vancouver and the District of West Vancouver. Both of these municipalities have also just adopted or considered new affordable housing policies and will be looking for community partners to take advantage of new provincial and federal affordable housing funding and opportunities to include new affordable units into new developments occurring in their municipalities. It may be possible to leverage the successes and lessons learned from working in the District to help activate the relationship with the other municipalities.

4.4.5 Legacy Funding

Focus on Aging Baby Boomers as Future House Donors

A crucial characteristic of fundraising that is often ignored is that fundraising is likely to be more successful if there is a linkage between the mission of the organization and the type of fundraising focus and strategy. For example, an art auction fundraiser is likely to be more successful as a fundraising tool for an art gallery than for another type of non-profit. To this end, given that the NSDRC is in the business for providing houses for people, why not ask for houses from people?

It is a reality that the boomer demographic will begin to die in large numbers over the next 20-30 years. Many, but not all will, want to contribute houses and other assets to family. But, some do not have family, or will choose to donate some or all of their assets to the community. The NSDRC could respectfully position itself as a primary recipient of houses from people’s estates, and possibly other assets.
NSDRC Need for Future Flexibility and Donor Communication

It would be important to communicate clearly with potential donors that not all houses gifted would necessarily be appropriate for conversion to group homes, and that some may be sold, or rented. The bottom line is that any agreements structured for legacy gifting would have to ensure the NSDRC had flexibility to use, sell, or rent any houses as they see fit. The simple reality is that the future is unpredictable, and the NSDRC needs to be upfront with donors that they need future flexibility to do as they need to with gifts, in order to best serve their clients. As many donors prefer to contribute to the long-term health of an organization, it may be worth considering that such asset sales may contribute to a long-term endowment for the NSDRC, as opposed to being put into operating funds.

Last, it will be important to review in an ongoing manner the nature of properties being gifted. Some properties may be “dumped” because of problems – leaky buried fuel tanks for example. The NSDRC would need to have a strategy for handling those, likely very rare, but important issues.

Retrofit Costs

Related to the above is the need for retrofit costs to be covered, if a house is deemed suitable for conversion to a group home. Although this is a big ask, this issue could be raised with donors who may have additional financial assets to donate beyond their homes.

Fundraising Costs Upfront - Revenue Later

One of the challenges is that this is a long-term strategy that may not contribute immediately to the bottom line of the NSDRC. It depends on careful and respectful cultivation of potential donors over a long-term. However, even a single donated house in the current market would be enormously more valuable that multiple smaller donations.

Fundraising Resources Needed

Because of the particular sensitivities about legacy gifting, it would be valuable to engage a professional fundraising consultant. A successful campaign would require both sensitivity and straightforwardness, and would need to be maintained and tweaked over time. This is not a “one big event” strategy.

Bottom Line

In a tough fundraising environment, non-profits need to stand out with creative strategies. By linking the demographic reality of many North Shore homeowners nearing the end of their lives, with the NSDRC’s ability to use gifted houses effectively, a strategy encouraging legacy gifting of houses and other assets could have big long-term benefits for the NSDRC and those they serve.
4.5 NSDRC QUESTIONS ANSWERED

What is the best way to leverage existing land assets to generate capital to meet the NSDRC’s goal of increasing the number of units for clients?

Create an asset management plan that sets out ways of deciding which properties should be sold and which retained. See “Sell” situation for outline of costs and benefits for sale, and “Keep” situation for costs and benefits of redeveloping. Refer to 4.1 Create An Asset Management Plan.

When the NSDRC is looking to purchase properties, what is the most cost effective form of housing on the North Shore that would meet the needs of NSDRC?

Likely custom designed condominium units created through density bonusing. Refer to 4.3.2 Sell Asset Scenario.

What are methods to generate long-term income to meet increasing operating costs?

Future development could include both mixed-market and non-market rental. Refer to 4.2 Intensify Selected Sites In Existing Portfolio and 4.3.2 Sell Asset Scenario. Also consider life leases, partnering with other non-profits, and legacy funding. Refer to 4.4 Develop Alliances.

Are there other operational funding models available through BC Housing or another organization that would offset the increase in operating costs?

It is recommended that the NSDRC seek out ministry sponsorship with either the Vancouver Coastal Health Authority, and/or Ministry of Children and Family Development to see if there are opportunities to increase group home supply.

If properties must be divested to generate capital, what criteria should be used for selecting the properties to sell? (e.g. property value, condition of structure(s), development potential/land use and zoning, tax rate). 951 Hendry Avenue can be used as a prototype. Refer to 4.1 Create An Asset Management Plan.

If the NSDRC chose to re-develop the Hendry Avenue property, what would be the best housing option for this location? For example - 2 story with separate suite, 1 story with carriage house, etc.

1 - 4 bed unit and 2 – 2 bed units that could be combined - all designed as one house. Refer to 4.2.2 Two - 4 Bedroom Units.

What options and/or advice has the Panel not addressed in answering the questions above that could benefit the NSDRC and it’s clients?

Enhance primary focus on North Vancouver. Refer to 4.4.4 Working With the District of North Vancouver and consider creative fundraising with housing gifts. Refer to 4.4.5 Legacy Funding.
5.0 PANEL BIOS

5.1 TAP CHAIR/FACILITATOR

5.1.1 Bruce Haden, Bruce Haden Architect

Bruce was a partner at DIALOG (Vancouver Studio), one of Canada’s largest integrated architecture and engineering firms before stepping out on his own in 2015. He is currently working on what may be the first Passive House commercial building in Canada and the first Passive House heritage renovation/addition in Canada. The commercial project, as well as meeting Passive House standards, will seek to create an environment of “creative collision” and social purpose. He is also designing an addition to the Nk’Mip Desert Cultural Centre, one of his favourite projects from his time at HBBH. Bruce continues to work with DIALOG on the new Vancouver Public Library on East Hastings Street that also contains YWCA housing for single mothers. Bruce’s design work has been recognized globally, particularly for the Governor General’s and World Architecture Festival winning design for the Nk’Mip Desert Cultural Centre in Osoyoos, BC. The work ranges from urban design though architecture, and includes an unusual range of project types and sizes, from large scale public/university projects and mixed use projects, to smaller projects such as pump stations, and the competition-winning design of the Canadian Navy Monument in Ottawa.

5.2 TAP PANELISTS

5.2.1 Andrew Evans, Deloitte Canada

Andrew Evans is a Senior Manager in the Financial Advisory group in the Vancouver office and works with clients across Western Canada to maximize the potential of their real estate through sound planning and strategy. His clients include real estate owners, developers, investment firms, public sector groups, First Nations, retailers and lenders. Working with the rest of the national real estate team, Andrew provides clients with market studies, development strategy, corporate real estate strategy, transaction support and governance and real estate process reviews.

5.2.2 Emer Nagle, KMBR Architects

Emer is an internationally trained designer whose passion for sustainability informs her designs and choice of materials. She believes that sensitive extensions and renovations are opportunities to extend the lifetime of buildings and she designs creative and environmentally progressive spaces that have a positive impact on user experience. Emer has worked on a broad range of institutional projects including schools, community centres and renovations and extensions to heritage buildings. Emer has worked on a wide range of residential typologies including single family housing and residential towers. Emer draws on her European heritage and North American experience to find innovative design solutions that nurture connectivity and community. On a personal note, Emer brings the experience of having older family members with mobility issues and caring for her small son. This gives her an additional sensitivity to the requirements of users with special needs, their families and caregivers.
5.2.3 Kate Lambert, IBI Group

Kate Lambert is an urban planner in the Vancouver office of international design firm IBI Group. With more than ten years of experience as a planning consultant, Kate has contributed to major community planning and social policy initiatives, complex development approvals, and dynamic public engagement processes for a variety of private and public sector clients in urban and rural communities across BC and Alberta. Prior to joining IBI Group, Kate worked with CitySpaces Consulting and Brook Pooni Associates, both highly regarded planning firms in Vancouver. Kate is a Registered Professional Planner and Member of the Canadian Institute of Planners. She holds a Master’s of Environmental Design (Planning) from the University of Calgary, and a Bachelor of Arts from the University of Victoria.

5.2.4 Mandy Hansen, Insight Specialty Consulting

Mandy Hansen is a senior professional with over 15 years experience specializing in real estate strategy and project management. As a senior leader of transformational change and portfolio initiatives, she has managed change initiatives, construction programs, and strategic assessments. She is adept at project recovery, and has helped many organizations reset project and program initiatives. She also has extensive experience in real estate transaction implementation ranging from lease negotiation to P3 assessment. Using this broad range of experience, initiatives can be taken from the strategic portfolio level through to tactical project implementation. Mandy has a MSc in Public Administration and Development and a Bachelor of Business in Real Estate. She proudly carries the RI designation from the Real Estate Institute of BC and the PMP from the Project Management Institute. She is a certified Prosci change management practitioner.

5.2.5 Michael Brown, Trillium Project Management

Michael heads up all development operations for Trillium Project Management. He holds a Bachelor of Arts from Queen’s and an MBA from UBC Sauder School of Business. Michaels started his career in commercial lending at HSBC, moving on to development management for the past twelve years working for leading development companies including Intrawest, Mosaic Homes and Concert Properties. Michael has managed all aspects of development for his projects ranging in size from $20-$400 Million in real estate. Having led numerous project through the design and approvals process, Michael brings the ability to quickly assess the development potential of a given property and provide a summary of the project’s financial feasibility.
5.2.6 Sheryl Peters, BC Housing

Sheryl has been working with BC Housing since 2009. Her 16 year career spans a diverse portfolio that includes multi-residential developments; master planned communities; hotels; neighbourhood shopping centres; and regional retail centres. Her roles have included marketing and project management - working with private and commercial developers such as Polygon, SmartCentres and the Holborn Group of Companies prior to coming to BC Housing. Sheryl holds a Bachelors degree in Urban Geography from UBC and a Diploma in Building Technology from BCIT.

5.2.7 Phil Chapman, Consultant

Phil graduated from SFU in 1976 with a BA (Geography) and in 1981 he graduated from UBC’s School of Urban and Regional Planning. Phil’s career began with Blakely + Associates, a private land use planning firm. He then went on to work in the Planning Department with the City of Vancouver from 1981 to 1990. In this time Phil was involved in Hastings Sunrise and Mt. Pleasant Local Area Plans; Expo Line Station Area Plans; heritage planning; Central Area and Expo Lands development planning; and Social Planning (services, funding and issues related to seniors and people with disabilities). Phil worked in Sustainable Community Planning for the District of North Vancouver from 1990 to 2016, and was involved with several Local Plans; District Official Community Plans 1995 & 2010; Seylynn Village and LionsgateTownhouse Concept Plans; Lynn Valley Town Centre Master Plans; and as the Social Housing Planner leader in Affordable Housing Strategies; Tenant Assistance Policy; Liaison for services to seniors, people with disabilities and homeless and community organizational development. A recent retiree, Phil is currently engaged in establishing a private consulting practice…when his is not racing!
ULI facilitates an open exchange of ideas, information, and experience among local, national, and international industry leaders and policy makers dedicated to creating better places.

6.0 THE URBAN LAND INSTITUTE

6.1 ULI BACKGROUND

The Urban Land Institute (ULI) is a nonprofit research and education organization supported by its members. Founded in 1936, ULI now has members in 95 countries worldwide, representing the entire spectrum of land use and real estate development disciplines working in private enterprise and public service. ULI British Columbia was formed in 2006.

As the preeminent, multidisciplinary real estate forum, ULI facilitates an open exchange of ideas, information, and experience among local, national, and international industry leaders and policy makers dedicated to creating better places.

Members say ULI provides information they can trust and is a place where leaders come to grow professionally and personally through sharing, mentoring, and problem solving. With pride, ULI members commit to the best in land use policy and practice.

6.2 ULI MISSION

ULI’s mission is to provide leadership in the responsible use of land and in creating and sustaining thriving communities worldwide.

We are committed to:

• Bringing together leaders from across the fields of real estate and land use policy to exchange best practices and serve community needs;
• Fostering collaboration within and beyond ULI’s membership through mentoring, dialogue and problem-solving;
• Exploring issues of urbanization, conservation, regeneration, land use, capital formation, and sustainable development;
• Advancing land use policies and design practices that respect the uniqueness of both built and natural environments;
• Sharing knowledge through education, applied research, publishing, and electronic media; and
• Sustaining a diverse global network of local practice and advisory efforts that address current and future challenges.
ULI BC initiated its TAP program in 2012. It did so to address the demand for focused and cost effective advisory services, provide a platform to bring together the public and private sector, and provide an outlet for our members to give back to the community.
6.3 ULI ADVISORY SERVICES

ULI's Technical Assistance Panel Program (known as “TAP”) is an extension of the national ULI’s Advisory Services Program. ULI Advisory Services Panels provide strategic advice to public sector and non-profit organizations (a “Host Organization”) on complex land use and real estate development issues. The program links these hosts to the knowledge and experience of ULI and its membership. Established in 1947, the Advisory Services Program has completed over 500 panels, in 47 U.S. states, 12 countries, and 4 continents. The Advisory Services Program has been successful due to its comprehensive, pragmatic approach to solving land use challenges. Each TAP follows a proven process that begins with a conversation between ULI representatives and the potential Host Organization to frame the assignment. ULI then assembles an interdisciplinary panel of volunteers who spend time on-site exploring the project, interviewing stakeholders, and making recommendations. Panelists may approach the assignment from many perspectives, including market potential, land use, design, financing, and implementation.

6.4 ULI BC TAP PROGRAM

ULI BC initiated its TAP program in 2012. It did so to address the demand for focused and cost effective advisory services, provide a platform to bring together the public and private sector, and provide an outlet for our members to give back to the community. ULI members volunteer to serve on a TAP and are not compensated for their time, only their expenses. The service is provided primarily to ULI public agency and non-profit organizations (which hold at least one individual membership with ULI) with a tool to solve real estate and land use problems in a uniquely objective way.

6.5 TAP APPLICATION PROCESS

As appropriate, the potential Host Organization is requested to provide a general background statement of the project and issues, supplemented by three or four key questions that the Host Organization would expect the TAP Panel to address.

Applications are then evaluated on the basis of several criteria, including:

- The potential Host is a local government or non-profit organization;
- There is expertise within ULI BC membership to address the issues;
- The assignment can be completed in a day or two; and,
- The assignment meets ULI’s mission of providing responsible leadership in the use of land to enhance the total environment.
Panelists are selected based primarily on their experience and knowledge of the issues posed by the TAP Host Organization. Panelists should have a balance of skill, knowledge, and experience to address the issues thoroughly and objectively.

6.6 TAP PANELIST SELECTION

Prior to holding the NSDRC TAP, ULI BC developed a list of prospective Panelists with expertise in a diverse range of disciplines. The selection criteria included the following:

Knowledge of Specific Issues:
Panelists must have relevant experience and knowledge of the issues.

Skills at Dealing With Issues on Short-term Panel:
Panelists must be able to quickly assess the situation and address issues in a manner designed to complete the assignment in one to two days.

Excellent Communication Skills:
Panelists should be able to work well in a team environment and be experienced in delivering presentations.

No Conflict of Interest:
The Panelist and the Panelist’s firm/organization must not be professionally involved with the Host Organization’s project or a directly competitive project. The Panelist must disclose any prior or ongoing relationship with the Host Organization.

Commitment:
Panelists must be willing to make the time commitment required to review the briefing materials and effectively understand the issues, participate completely, and review portions of the final report. The total time commitment is approximately two days.
The mission of the Urban Land Institute is to provide leadership in the responsible use of land and in creating and sustaining thriving communities worldwide.