



# My Home My Community

*Inclusive Housing Options for  
People with Developmental Disabilities:  
A National Demonstration Initiative*

## Case Study Report 2: Legacy Homes, Brockville, ON

October 2019

**This report was produced as part of My Home My Community, a national initiative of the Canadian Association of Community Living and People First of Canada.**

The Canadian Association for Community Living is a national federation of 13 provincial-territorial associations and over 300 local associations working to advance the full inclusion and human rights of people with an intellectual disability and their families. CACL is dedicated to attaining full participation in community life, ending exclusion and discrimination on the basis of intellectual disability, promoting respect for diversity, and advancing human rights to ensure equality for all Canadians. CACL leads the way in building a more inclusive Canada for people with an intellectual disability by strengthening families, defending rights, and transforming communities into places where everyone belongs.

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People First of Canada is the national voice for people who have been labeled with an intellectual disability. We believe in the right to freedom, choice, and equality for all. We support each other to reclaim our right to be recognized as full citizens through peer support, sharing our stories, developing leadership skills, advocating for our right to choose where and with whom we live, and by ensuring that our voices are heard and respected. We work together to educate and influence communities and government to ensure that all persons with intellectual disabilities are fully included and supported to live as equal citizens in Canada.

[www.peoplefirstofcanada.ca](http://www.peoplefirstofcanada.ca)

My Home My Community is a national partnership initiative that is opening doors to inclusive affordable housing for people with developmental disabilities. My Home My Community is driving innovation in housing development and community supports to ensure all persons with developmental disabilities have a home that offers choice and affordability, recognizes rights, addresses support needs, and fosters social inclusion in the community.

[www.myhomemycommunity.ca](http://www.myhomemycommunity.ca)

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CANADIAN ASSOCIATION  
FOR COMMUNITY LIVING  
ASSOCIATION CANADIENNE POUR  
L'INTÉGRATION COMMUNAUTAIRE

Diversity includes. On se ressemble.

PEOPLE  
FIRST  
OF CANADA



PERSONNES  
D'ABORD  
DU CANADA

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## 1.0 Introduction

This report provides an in-depth review of Legacy Homes' efforts to develop new housing solutions for people with a developmental disability. This case study report is part two of three in a series developed for the Canadian Association for Community Living's *My Home My Community* Inclusive Housing Options for People with Developmental Disabilities national demonstration project.

### 1.1 The Case Studies

The My Home My Community: Inclusive Housing Options Demonstration Initiative profiles three innovative approaches to developing inclusive, affordable, and accessible housing. These models not only provide support, but also foster social inclusion for individuals with a developmental disability.

The models profiled as part of this demonstration initiative are just a small sample of the diverse range of ways people with developmental disabilities and their circles of support are making inclusive affordable housing a reality. None are perfect: the models developed in these case studies all have their strengths and weaknesses; each emerged out of a specific context with its own limitations and areas of excellence. Together, they contribute to a growing body of work recognizing the potential of housing to be the cornerstone of inclusive communities.

The three case studies profiled in this series are:

- **Case Study 1: Community Living Toronto, Toronto ON**  
This initiative works with housing developers in Toronto to secure dispersed-individualized rental apartments to provide security of tenure, housing affordability and supports for inclusion.
- **Case Study 2: Legacy Homes – Brockville and District Association for Community Involvement, Brockville ON**  
This initiative provides individuals and families planning resources, acquires individual homes in the community and provides lifelong lease agreements to individuals with developmental disabilities to ensure security of tenure and supports to enable inclusion.
- **Case Study 3: UNITI-Chorus – Semiahmoo House Society, South Surrey BC**  
This initiative leverages undeveloped property and capital assets to develop affordable rental housing, designed to fit the needs of people with intellectual disabilities but including tenants with and without disabilities.

This report provides an overview of the findings from the Legacy Homes case study (case study two). The case study may be of particular interest to families looking to leverage their own assets to develop a housing solution for their family member with a developmental disability. It may also inspire organizations to work together with groups of families to develop customized housing solutions for individuals with a developmental disability.

For detailed descriptions of the case studies of Community Living Toronto and UNITI-Chorus please see case study reports one and three in this series.

Case Study 1: <b>Partnering with Developers</b> Community Living Toronto	Case Study 2: <b>Family-Led Solutions</b> Legacy Homes	Case Study 3: <b>New Development</b> UNITI-Chorus
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## 1.2 Why These Case Studies

Throughout Canada, at least 24,000 Canadians with developmental disabilities are in core housing need<sup>1</sup>, with tens of thousands more in vulnerable housing situations. The *My Home My Community* Initiative is a local-to-national program framework that promotes new development pathways to inclusive, affordable housing for individuals with a developmental disability.

Previous research has identified three development pathways that have demonstrated success in delivering inclusive affordable housing. These pathways were identified through a series of consultations from December 2016 to October 2018 and involved individuals with developmental disabilities and family members, Provincial and Territorial Associations for Community Living (ACLs), members of People First of Canada, housing developers, community partners and local support agencies. The identified development pathways are:

### 1. Individual and/or family-led housing solutions

Many families have ideas or are successfully developing their own housing solutions. With some support, knowledge sharing, and financial tools, more individuals can take action, with a flatter learning curve.

### 2. Partnered Solutions

Local or provincial/territorial organizations can partner with families and housing sector professionals to develop new housing.

### 3. New Development and Regeneration

Providers of housing and supports for individuals with developmental disabilities are seeing a mismatch between their own inclusivity principles and outdated models of residential services. Increasingly, housing providers are looking to leverage their assets and invest in inclusive, affordable housing that prioritizes the needs of people with developmental disabilities but welcomes disabled and nondisabled residents.

The National Housing Strategy released in 2018 by the Federal Government has allocated funding and initiatives to construct a total of 2,400 units for individuals with

<sup>1</sup> Statistics Canada defines a household in core housing need as one whose dwelling is considered unsuitable, inadequate or unaffordable and whose income levels are such that they could not afford alternative suitable and adequate housing in their community.

developmental disabilities. An asset inventory<sup>2</sup> conducted as part of the My Home My Community Initiative identified that along the three pathways there is an estimated development potential of up to 35,000 units Canada wide.<sup>3</sup>

The goal of this project is to create a platform that will engage the housing sector, government, and community partners in learning about these three development pathways and help achieve scale along these approaches across Canada through replication.

### 1.3 Report Format

The case study report consists of three main parts. Part one develops an in-depth overview of Legacy Homes' approach to creating new housing for individuals with a developmental disability and the impact of this approach on tenants, families and support staff. The remaining section outlines the lessons learned and opportunities for replication of this initiative across Canada. For an overview of the approach taken to develop this case study, see appendix A.

## 2.0 Introducing the Project

Legacy Homes is a non-profit charitable housing corporation located in Leeds and Grenville United counties (Ontario). The initiative grew out of a desire by parents of people with a developmental disability to ensure their children could remain in the community where they had always lived, even after their parents could no longer support them in the family home.

Legacy Homes does this by acquiring homes in the community and renting these homes to people with a developmental disability through a life-lease. This allows people with a developmental disability to have a home of their own without having to navigate the complexities of accessing homeownership, such as obtaining a mortgage and entering into an agreement of purchase and sale.

Supports are organized through a committed "circle" of organic support, including family members, friends, neighbours, and paid support workers. The circle also ensures that the family's philosophy for inclusive housing and supports is advocated for, even after the parents can no longer do it themselves.

Legacy Homes strongly believes that housing and supports should be separated from one another. Therefore, the corporation does not provide paid supports. Supports are organized through a partnership with the Brockville and District Association for Community Involvement (BDACI) or other support agencies, so tenants can live as independently as possible in the community.

As of 2019, Legacy Homes operates a total of seven (7) homes and two (2) condominium apartments in Leeds and Grenville United counties. These homes offer

<sup>2</sup> Canadian Association for Community Living (2019). My Home My Community: Asset Inventory <https://static1.squarespace.com/static/57f27c992994ca20330b28ff/t/5d56a5e63df6e9000117b679/1565959655552/MHMC+Asset+Inventory+FINAL.pdf>

<sup>3</sup> Canadian Association for Community Living (2019). My Home My Community: Asset Inventory: 4.



housing for ten tenants. Some homes are located in Brockville, ON while others are located in other areas of the counties such as Smiths Falls, ON or North Augusta, ON.

## 3.0 The Development Timeline (2001 – 2017)

### 3.1 From Idea to Action (2001 and earlier)

The start of the Legacy Homes initiative can be traced back to the 1980s in a period of de-institutionalization of supported housing for people with a developmental disability. During this time, parents of individuals with a developmental disability in the Leeds-Grenville area started a group that regularly came together to explore what supported decision making<sup>4</sup> and inclusive housing could look like for individuals with a developmental disability. There was a strong sense among the members of this group that the group home model, or any other form of congregate living, would not be able to foster inclusion and facilitate a normal life for people with a developmental disability. In addition, group members felt strongly that there should be a separation between housing and supports. In most housing solutions for people with a developmental disability paid supports are provided by the agency who owns the housing, and the group of parents felt this would lock their children into a specific way of life they might not have necessarily chosen for themselves.

#### Key Drivers of Change

- Discontent with the lack of options for people with a developmental disability outside of group homes and other congregated settings
- A desire to separate the organization that provides the housing from the organization providing the supports
- A fear that as primary caregivers/parents were aging, they could no longer prevent their loved ones from entering congregated living environments

#### Project Representative

"It is absolutely essential to separate housing from supports. As long as you keep it separate you can figure out a more natural way for an individual to live. If you put it together, you lock the individual into a specific way of life designed by an organization."

From the 1980s and throughout the 1990s the group of parents continued to meet, and held community consultations on housing-related issues with families, professionals, politicians, counties, universities, health providers, etc. However, as time progressed, many group members started to age and became increasingly worried that their children would eventually end up in congregate housing and support settings when they themselves could no longer take care of them. This was something they wanted to prevent at all costs.

<sup>4</sup> Supported decision-making is a model that helps a person with a developmental disability understand, make, and communicate their own choices. When using supported decision-making, the person can execute an agreement which identifies their personal method of decision-making, regardless of their communication means. This document can help doctors, bankers, lawyers, and other third parties understand and accept the decision of the person with a disability.



In 2001, the group of parents, now named the Legacy Committee, was able to involve Ryerson University in their quest for a solution to their problem. One member of the group, associated with the University and with funding from BDACI, wrote a research proposal to investigate the needs of older parents with children with developmental disabilities living at home. Through this work the Legacy Committee found housing was the core issue among older parents who had a child with a developmental disability.

### 3.2 Preparation Stage (2001 – 2007)

The results of the study motivated the Legacy Committee to pursue the issue of housing further. Over the course of two years they visited a number of other parent groups who were trying to explore alternative housing and support solutions, as well as a number of facilities offering housing and supports for individuals with a developmental disability throughout Canada. One of these organizations was Nabors in Toronto, which helps families to create a circle of non-paid supports around individuals with a developmental disability.

#### **Legacy Homes' Concept of Home:**

- Home is a unique creation that comes from the heart of the person, and their life. It could never be created by an organization.
- Home is a reflection of one's unique identity.
- Home is the base from where one participates in society and connects to their neighbourhood as well as their community. It is where one issues the invitations and controls the environment.

At the same time, in the early 2000s and with the continued support of BDACI and an outside legal consultant, the Legacy Committee found ways to connect with other parents in the area through additional consultations. Taking almost two years to complete, the key objective of these sessions was to develop an inclusive concept of home and explore how this could be achieved for individuals with a developmental disability. During the consultations the Legacy Committee renewed its exploration on alternatives for group homes and heard from individuals and their families about the importance of receiving their own mail and having a key to their own front door. In addition, the consultations found that stability of tenure was a key issue, in particular when the primary caregivers, such as the parents, were no longer there to

provide support if necessary.

A number of delivery methods for housing were considered, including a housing co-operation. However, the Legacy Committee determined that it would be hard to maintain the vision of the co-operation as values often change after the first generation of tenants move out. Therefore, it was decided a housing corporation, independent from BDACI, would be best suited to enable the separation of housing and supports and the facilitation of individualized approaches to housing. At that time the Legacy Committee had no funding or knowledge on how to move forward. It took another two years before they were able to do so.

In 2007, with financial support from BDACI as well as assistance from the independent legal consultant who helped write by-laws, lease agreements and general processes, Community Involvement Legacy Homes Inc. was incorporated. Based on legal advice, it was decided that Legacy Homes would purchase the homes on behalf of the families and provide a life-lease to tenants to ensure stability of tenure and an approximation to

homeownership. Particular time was spent developing the lease agreement, which was designed to allow for a supported decision-making framework so that all residents, regardless of perceived legal competency, could sign. In addition, the Legacy Homes lease includes a clause protecting the tenants from Legacy Homes forcing them out of their homes in the future, so long as they continue paying their rents<sup>5</sup>.

While separate, Legacy Homes maintained and continues to maintain strong ties with BDACI. For example, the president of BDACI also sits on the board of Legacy Homes as an ex-officio member and for a number of years BDACI provided yearly funds from their reserve so that Legacy Homes could acquire staff. BDACI also offered Legacy Homes accounting services, office space, and telephone lines, which it continues to do.

### 3.3 Acquiring Homes (2007 – 2017)

With the corporation legally established, it could start purchasing homes in the community. The first home was purchased in 2008 for a community member with a developmental disability who struggled to find safe and affordable housing in the community.

Marlene had lived in foster care, group homes, locked institutional wards, social housing, low-income rental apartments, and on friend's couches. She had also experienced episodes of homelessness, but from 2003 to 2008 she lived in a basement apartment. As she aged her housing needs changed, and Marlene could no longer manage walking up the stairs. Together with the Legacy Homes team, Marlene worked to find a condominium apartment that suited her needs in the Brockville area. However, both Marlene and Legacy Homes did not have the money to put toward a down payment. Instead, the Legacy Homes team fundraised the money required through the community and applied for funds from two foundations.

#### Support Circles

In addition to providing housing, Legacy Homes, with assistance from BDACI, helps to build a circle of supports around each individual. The circle may consist of family members, friends, neighbours or support staff familiar with the individual. The circle plays a key role in ensuring the support and housing philosophy for the individual remains intact after the parents can no longer advocate for their loved one.

When enough money had been raised, Legacy Homes purchased the home and secured a mortgage. Marlene became the first tenant, with her rent payment covering the monthly mortgage payment, and lived in her home until her death in 2018. Between 2009 and 2015, Legacy Homes acquired three more homes. As opposed to recruiting for tenants, Legacy Homes was acutely aware which families in the community had the highest need from their community outreach and consultations. The Legacy Homes team worked closely with each family to determine what kind of home and support model would fit each individual and their circle of support<sup>6</sup>.

In 2015, to increase capacity, Legacy Homes and BDACI partnered with a likeminded organization in Durham Region (the Durham Association for Family Respite Services). Together they successfully applied for funding from the Ministry of Community and

<sup>5</sup> For more information on the life-lease agreement, see section 6.1.2 in this report.

<sup>6</sup> For more information on how Legacy Homes secures homes and establishes circles, see section 6.

Social Services through the Developmental Services Task Force Project. This additional financial support allowed Legacy Homes to increase its capacity to help more families secure individualized housing and improve its services. As a result, Legacy Homes more than doubled its housing portfolio from four to nine homes by 2017.

#### Key Lessons Learned

- Involve a legal professional to help draft the lease agreement and by-laws of the organization.
- Work closely with each family to design a housing and support situation that fits the individual.
- Connect with local or provincial governments to obtain information on any housing subsidies or funding that might exist for tenants or the organization.

Legacy Homes wanted to make the monthly rent more affordable for its tenants. The Legacy Homes team set up a meeting with Leeds-Grenville counties and the Service Manager for housing in the area to see if there were any rent supplements available. During this meeting, county staff pointed Legacy Homes to capital grants of \$150,000 per house and the Housing Allowance component it manages on behalf of the Province of Ontario through the Investment in Affordable Housing Program – Extension (IAH Program).

The team made attempts to secure capital grants during the purchase of new homes, as well as secure housing allowances for existing tenants. They were able to secure some capital grants; however, according to the guidelines of the Housing Allowance Program, most tenants were considered “over housed”<sup>7</sup> and did not qualify for an allowance because of it. All homes had

two bedrooms or more, while most individuals were living on their own. The Legacy Homes team worked together with the Service Manager for almost a year to overcome this barrier and secured housing allowances for several of the tenants. However, only tenants in need of 24-hour supports or those living with a roommate were ultimately able to secure a housing allowance.

#### Project Representative

“We had a meeting with Leeds-Grenville Counties. Originally, we applied for Marlene to get a housing supplement. Then we found out housing allowances were available. [...] It took about a year to get them in place. Initially they said they [the tenants] were over housed. We had to justify why they really were not”

### 3.4 Moving Forward (2017 – 2019)

Since 2017, funds from the Developmental Services Task Force Project and annual transfers from BDACI were unavailable, meaning Legacy Homes could no longer afford paid staff and halting the process of acquiring new homes. Currently, the organization is working to acquire a stable stream of funding to hire qualified staff to continue helping individuals with a developmental disability and their families secure independent housing in the area. Some avenues they are pursuing include working with the local counties and political advocacy through supportive Members of Parliament.

<sup>7</sup> ‘Over housed’ is a term that defines the dwelling as too large for the occupying household size.

## 4.0 Impact

This section provides a description of the impact the Legacy Homes Initiative has had on tenants, their families, and support staff. A total of three engagements with tenants and their support circles were conducted as part of the data collection phase.

### 4.1 Impact on Tenants and their Support Circles

#### 4.1.1 Impact on Tenants

All tenants in this study do not use spoken or written communication. This made it challenging for the research team to assess the impact of the project on the tenants' lives from first-hand account. However, based on observed behaviour of the individuals and conversations with circle members who regularly help translate a person's expressed communication, an understanding was obtained.

Two out of three tenants lived in the parental home before moving to their current home, and both circles indicated the parents of these tenants were aging and could no longer support them. These families became involved with Legacy Homes to prevent their loved ones from entering into a congregate housing setting, such as a group home. The third tenant was living in a condominium apartment in Brockville. This family had developed a plan with the individual to achieve a stable housing and support situation outside of the family home; however, the urban setting was not working out. Some of this individual's favourite activities were outside, such as digging, wandering in the garden, or going for country drives - activities that were not feasible in a condominium apartment in a city. While all three tenants do not communicate with words, one tenant had clearly indicated a desire to move out and was showing signs of increasing frustration with the structure and strict routines in the parental home.

#### Circle Member

"He likes having space and independence to be able to do what he wants to do. When he still lived at home, he used to leave the house and wander to the grocery store or pizza place which was dangerous. [...] He did not like to hear no, which would lead to conflict."

When the opportunity arose to live in a home of their own through Legacy Homes, two of the three tenants' circles did not hesitate. They had been part of the Legacy Committee for many years and were prepared to move forward. One circle needed more time before they were ready to commit to an independent housing option. All three circles expressed that the move to the new home went smoothly from the tenant's perspective. This was partly due to significant time spent on preparing a familiar environment for the tenants - with pieces of furniture from their old homes, music and appliances they liked, as well as spaces in the home tailored to their interests. For example, one home included a large space in the garden for digging, the tenant's favourite activity. This family also ensured the garden would be a safe place for the individual to wander independently.

After the tenants moved into their respective houses, two circles indicated that they observed little to no negative change in their loved one's behaviour and daily routines. One circle reported noticeable positive changes in behaviour after the move, indicating that the tenant had become less aggressive and more welcoming to visitors. One circle had issues getting the necessary support network in place, which caused a one-year delay in the move-in process. However, they also expressed that this did not impact the tenant significantly.

For two tenants who chose to live in the same home, the experience of moving in together was described as generally positive for both. The two families had come to this arrangement because at previous gatherings these two individuals always found each other and appeared to share a mutual connection. While the experience overall has been positive, both circles noted that they had to learn how to understand each other's needs due to the different lifestyles of both families. However, the circles also expressed that these differences had positive effects since it led to new experiences for their loved ones that they would not have experienced otherwise.

#### Circle Member

"Life is different here [in the new home]. Before he lived with old parents, now there are younger people around him. He lived a quiet life in a house, while we were reading or listening to [classical] music. His roommate's family took him to a Neil Diamond concert and he really liked it!"

One circle noted that weekends were less busy for their loved one compared to weekends in their family home, and they were afraid they might get bored. To mitigate this issue some tenants have family or circle members come over on weekends, while others have a roommate without a disability who can support them when paid staff are not available. This is not applicable for all tenants.

One circle also noted they realized moving forward there might be a need to make modifications to the home, as the tenant was starting to have issues walking up stairs to enter the home. However, the family members of this individual also expressed confidence that these adjustments could be made when required.

### 4.1.2 Impact on the Support Circle

All the circles of support became involved with Legacy Homes to find a permanent inclusive housing solution for their loved one that would be sustainable after they were no longer there to support them. All circles responded that for the tenant to have their own home and supports was a great relief and peace of mind to them.

Some circles indicated that their role had changed. One circle member mentioned that the individual's mother had started working again, while another circle member indicated that they had become more a point of contact instead of a support worker.

### Circle Member

"Her father's role is not as hands on anymore. It is more a point of contact, managing finances, clothes etc."

All families did express that initially it took some time to hire the right support staff and that this caused some stress. It was very important to all families in this project that support staff followed the lead of the individual and cautioned that most support staff are not trained this way, coming from a background in congregate settings such as group homes. Therefore, it was necessary to let staff go when the support arrangement was not working out. Still, all families expressed confidence that the circles would be able to maintain the support philosophy, together with BDACI, if the parents could no longer be there to provide guidance. One family expressed a desire to find a roommate for their loved one to lower the cost of hiring overnight support staff.

Some of the circle members expressed a concern about what would happen if the individual's support needs changed so significantly that they would no longer be able to remain in the home. In particular, the two circles with loved ones who are roommates were aware of the interdependency of the situation and were not sure what they would do if one of the tenants had to move out, as living in the house would not be viable if a replacement roommate could not be found. It was noted BDACI would work together with the family and circle to find a replacement roommate, but it remains a concern.

### Circle Member

"There is still a risk, if one or the other can't live here anymore. However, we trust the organization [Legacy Homes] to give us control over choosing who a new tenant might be."

#### 4.1.3 Impact on Support Staff

Some of the paid support staff were contacted separately from the circle. All support workers had some previous experience working in congregate support settings. Two had worked in an institution while one had worked in a group home.

All support staff indicated that the one-on-one support model worked really well for them and provided an opportunity to really get to know an individual. Support staff also mentioned they had to make some adjustments in the way they provided supports. They mentioned they had to learn this was the tenant's home and to take their lead. All were on board with the tenant-led support philosophy used in the Legacy Homes initiative. They expressed how working one-on-one with tenants made them feel like they could have a much larger impact on an individual's life than they could previously.

### Support Worker

"It is very different from working in an institution. I am glad to see that people with a disability can live in their own home like this, having freedom to have choice. [...] He decides my day. [...] He



communicates with us through his actions, taking us by the hand where he wants to go".

In contrast, support workers also mentioned that the smaller setting made it harder to take time off. It was also mentioned that salaries were relatively low compared to other similar positions due to the small scale in which supports are provided. This might explain why some families indicated they had issues finding good support staff.

## 5.0 Project Description

This section provides a more detailed description of some of the structures and partnerships that made this project possible, including the process for acquiring homes, the organizational structure, support model, demographics of the tenants and how Legacy Homes ensures affordability.

### 5.1 Organizational Structure

Legacy Homes is incorporated as a non-profit charitable housing corporation. The corporation has its own Board of Directors. The decision to incorporate Legacy Homes as a separate organization instead of making it a part of BDACI was an intentional choice made by the Legacy Committee at the moment of incorporation. Setting-up a separate non-profit housing corporation [Community Involvement Legacy Homes Inc.] allowed for the formal separation of housing and supports, one of the core values underlying this initiative. Legacy Homes provides housing, while BDACI or another organization provides support. Separating housing and supports ensures families and individuals are not tied to one support provider, which gives the individual and their circle control over the philosophy of support without jeopardizing the access to housing.

The Legacy Homes Board of Directors consists of five Board members. In addition, the president of BDACI sits on the Board as an ex-officio member. This is a formal recognition of the close ties between Legacy Homes and BDACI.

In addition to the Board, Legacy Homes has an Executive Director who manages day to day operations. This role is currently filled by a volunteer. In the past there were funds to ensure the Executive Director was a paid position, but current funds do not allow for paid positions within the organization.

Being an entirely volunteer driven organization creates a number of issues, particularly as the existing group of volunteers is aging. Continuing the required maintenance and upkeep of the homes is a challenge and the organization is looking for funding that would allow them to hire a staff person to oversee the required maintenance.

### 5.2 Process for Acquiring Homes

#### 5.2.1 Purchasing the Home

Instead of acquiring homes and offering these to prospective tenants, Legacy Homes first consults extensively with interested families and individuals with a developmental disability before it purchases a home. During these conversations the prospective



tenant's housing and support requirements are determined as well as the available budget. Legacy Homes, together with the family, will then start looking for a home in the community that is suitable for the tenant.

With the help of BDACI, a support circle and support plan is formed around the prospective tenant. This circle may consist of families, friends, neighbours, paid support staff familiar with the family, or other appropriate individuals. The purpose of this circle is to provide impromptu supports where necessary and to ensure the decisions made by the support circle on behalf of the individual with a developmental disability are in line with the philosophy of the individual and their family.

When a suitable home is found and a support circle and support plan is in place, the family, circle members, and/or other donors make a donation to cover the required down payment of the home to Legacy Homes. Legacy Homes uses this donation to obtain a mortgage and purchase the home. Once the home is owned by Legacy Homes, the tenant signs a lease which guarantees security of tenure. The tenant pays a monthly rent to cover the mortgage payment. If this is not affordable to a tenant, Legacy Homes works with the family and partners to ensure prolonged affordability (see section 6.5). One significant lesson learned through this process was that the donations families make, unlike general donations, are not recognized as tax deductible by the Canada Revenue Agency as the donation benefits only one individual and not a group.

Once a tenant vacates a home, it returns to Legacy Homes who can then rent it out to another tenant or sell the home in order to purchase a new home. The donations made to purchase the home are final and not recovered by the family after the tenant moves out.

### Key Considerations

- **Benefits**

Families do not need to obtain a mortgage while acquiring a similar stability of tenure as homeownership.

Families can apply for housing allowances or other housing subsidies generally not accessible to homeowners.

- **Drawbacks**

Under this structure there is no equity build up in the home and the donation families make to Legacy Homes are not recuperated when the tenant moves out. Additionally, the donation is not tax deductible.

### Legacy Homes Legal Consultant

"The donation is a trade-off for families to secure stability of tenure for the tenant and should be seen as a contribution to the community."

The inability to deduct the donation from taxes and to recover the investment after the tenant moves out might be a deterrent for some families to pursue this model, as there is no equity built into the home. Groups concerned about equity might want to consider a more traditional life-lease model where individuals and families pay an upfront fee and make monthly payments to cover the mortgage, but the equity built-up in the home is returned to the individual or the family at the time of move out. Note, in an equity-based model as described here, tenants would not likely be eligible for

<sup>8</sup> AbleLiving (2013). Life Lease: A Supportive Housing Model. p.17.

housing subsidies or housing allowances. This could mean families would have to make other contributions to ensure the housing solution is affordable.

### 5.2.2 The Lease

While Legacy Homes refers to the lease as a life-lease, it is different from a life-lease commonly found in Canada. The most important difference is that tenants do not build up equity under the Legacy Homes model, unlike a standard life-lease model. Instead, the individual enters a landlord-tenant relationship with Legacy Homes, with their rent covering the mortgage payment. In addition, the lease that is signed between the tenant and Legacy Homes is different than a standard tenant-landlord lease. The lease was designed in close collaboration with Legacy Homes and their legal consultant:

- 1) There is no end date in the lease. The lease ends only when the tenant passes away, or decides, in collaboration with their circle, to find a different home and provides written notice to Legacy homes, or abandons the property. Legacy Homes can only terminate the lease if a tenant refuses to pay rent. This ensures the lease is for life.
- 2) It was paramount for the Legacy Homes team that the lease recognizes the tenants as individuals and adheres to a supported decision-making model over a substitute decision-making/guardianship model. Therefore, the lease may be signed by parents or circle members on behalf of the tenant if the tenant is unable to read or make a meaningful decision to sign; however, the lease is in line with supported decision-making practices and adheres to Article 12 of the UN Convention on the Rights for Persons with Disabilities.<sup>9</sup>

#### Key Considerations

- Investigate the status of supportive decision-making legislation in the relevant province or territory.
- In case of a missing legal framework, consider the level of trust that exists between all key stakeholders to ensure everyone is comfortable with the agreement.

Certain provinces in Canada have been more progressive in supported decision-making legislation than others. Manitoba, British Columbia, and Alberta have taken steps to allow for supports in decision-making models to recognize the rights of individuals with a developmental disability. Ontario has taken some steps but does not yet have a legal framework in place for supports in decision-making. The Legacy Homes initiative works even without a strong legal framework for supports in decision-making in Ontario because of the high degree of trust that exists between the tenants and their circle in relation to the Legacy Homes organization. This is possible due to the decades of collaboration that exists between the organization, tenants, and their families.

It is important for other groups who are considering this model to investigate the status of supported decision-making in their respective province or territory and reflect on their level of comfort using a supports in decision-making model if the legal framework is still developing in the respective province or territory. Trust between the organization, the tenants, and their families is important because the lease agreements could face legal

<sup>9</sup> <https://www.un.org/development/desa/disabilities/convention-on-the-rights-of-persons-with-disabilities/article-12-equal-recognition-before-the-law.html>

challenges in courts of provinces and territories where supports for decision-making is not fully recognized.

### 5.3 Tenants and Support Needs

Legacy Homes is currently the landlord to 10 individuals dispersed over nine homes. Two tenants live in the same home as chosen roommates. Two tenants have a roommate without a disability who supports them when paid supports are not available. Tenants all vary in gender, age, and support needs. A number of individuals have significant developmental disabilities, where they do not communicate with speech or text and need 24-hour support. Other tenants have need only occasional support to live independently in their own home.

The intensive consultations with families and individuals at the beginning of the process of acquiring a home ensures this housing initiative is able to accommodate a wide range of support needs.

### 5.4 Physical Design and Support Model

#### 5.4.1 Housing Design

Homes vary in design, type, and shape. Almost all tenants live in single detached one-floor bungalows. However, two tenants live in a condominium apartment. All homes could be adapted for accessibility and support needs if required in the future.

#### 5.4.2 Support Model

Support models are adjusted based on the needs of the tenant. Some tenants require support 24 hours a day while others only need occasional supports, which may be given by a roommate. Before tenants move in Legacy Homes requires that a support plan is in place, developed together with Legacy Homes and the support circle.

Paid supports are generally offered through BDACI, but some tenants opt to find other support agencies or hire their own support staff. This is possible due to the separation between housing and supports that is at the foundation of the Legacy Homes initiative.

### 5.5 Affordability

The intent of Legacy Homes is to provide rents that are geared-to-income. The affordability of the dwellings is secured in a number of ways. Families can opt to make higher donations which will ensure lower monthly rent payments as a result of a lower mortgage payments. If a home is not affordable to a tenant, Legacy Homes has a number of tools at its disposal to reduce monthly payments for the tenant. Because of its status as a housing corporation, Legacy Homes has been able to work with the local service manager<sup>10</sup> to obtain housing allowances for a number of tenants, which reduces their monthly rent. Other homes were purchased with increased down

<sup>10</sup> Service Managers are upper tier municipalities such as counties or cities who, in Ontario, are responsible for delivering affordable housing after the devolution of the housing portfolio from the Province to the Service Managers in 2001.

payments, secured by successfully applying for Investment in Affordable Housing (IAH)<sup>11</sup> funding of up to \$150,000 per home.

## 6.0 Community Inclusion

This section gives an overview of how the Legacy Homes housing contributes to the inclusivity of its tenants.

### 6.1 Measuring Inclusivity

MHMC has developed an innovative new **Housing Inclusivity Framework** for measuring inclusivity by expanding the existing definition of social inclusion and introducing a housing lens.<sup>12</sup> In this framework, housing inclusivity is defined as “the degree to which a person’s home either contributes or presents barriers to their participation in the broader community.”<sup>13</sup> The framework evaluates the tangible aspects of a housing situation across five domains which, together, lead to socially inclusive outcomes for residents. The five domains are:

1. Person Domain: The individual resident. Aspects pertaining to the individual, including income, functional capacities, support needs, etc., have a significant impact on required living situation and degree to which supports are needed to engage in community;
2. Household Domain: Similarly, the structure and capability set of the household, including income, support needs, etc., impact housing requirements and opportunity to engage in community;
3. Dwelling Domain: The built environment of the unit (which can take many forms) will either present or eliminate barriers to participation and independence;
4. Structure Domain: In the case of multi-unit structures, the building within which the home is situated also has an impact on visitability, accessibility, and opportunity for engagement with the first line of community: neighbours;
5. Neighbourhood Domain: The broader built, social and service environment in which the dwelling and structure are situated, and which affords resources like transportation, opportunities for community involvement, etc. The neighbourhood and its amenities can either present barriers or opportunities for people with developmental disabilities to engage in and be safe in their communities.

<sup>11</sup> The Investment in Affordable Housing program is a Federal/Provincial program that supports the creation of affordable housing through new construction, renovation, homeownership assistance, rent supplements, shelter allowances, accessibility modifications, and accommodations for victims of family violence.

<sup>12</sup> Canadian Association for Community Living (2019). My Home My Community: Conceptualizing ‘Housing Inclusivity’: A review of literature on housing, inclusion and developmental disability. <https://static1.squarespace.com/static/57f27c992994ca20330b28ff/t/5d5582bdbacd560001233e9b/1565885118508/Conceptualizing+Housing+Inclusivity+Lit+Review+-+FINAL+.pdf>

<sup>13</sup> Canadian Association for Community Living (2019). My Home My Community: Conceptualizing ‘Housing Inclusivity’ A review of literature on housing, inclusion and developmental disability: 15.

What makes the MHMC housing inclusivity framework so innovative is its ability to distill complex aspects that affect inclusion into an applicable framework.

To assess inclusivity in each domain, the framework uses indicators (for example, suitability, affordability, safety, choice and control) that examine the following:<sup>14</sup>

- Does the living situation present or eliminate barriers to activities of daily living?
- Is it a home-by-choice, and not the result of congregation of people in a housing unit, development or neighbourhood, based on a demographic characteristic?
- Does the living situation enhances capabilities to:
  - Participate in the social and economic life of their community?
  - Be recognized and valued as a full member of their neighbourhood?
  - Live independently and be included in the community?

## 6.2 Evaluation

This evaluation uses MHMC's housing inclusivity framework to assess the inclusivity of the Legacy Home's case study.

### 6.2.1 Person<sup>15</sup>

Indicators within the Person Domain:

- Personal Choice
- Social Connection
- Personal Supports
- Safety

The person domain focuses on the individual and evaluates how well they can live in, and benefit from their housing.<sup>16</sup> It also looks at location to assess whether the individual can access services and supports within the housing development or in the broader neighbourhood. This domain considers

the resources a particular person needs to access amenities on an equal basis with others, and to secure safe, affordable housing in inclusive communities.<sup>17</sup> For example, can tenants exercise basic autonomy over the decisions about where and how they live? Do they have opportunity to make voluntary social connections?

Legacy Homes' model of support is rooted in recognizing and respecting the decision-making authority of the tenant. Rather than use a guardianship approach, where others make legal decisions on behalf of a person with a developmental disability, Legacy Homes uses a supported decision-making model. The model helps a person with a disability understand, make, and communicate their own choices – recognizing their authority to enter into an agreement about where and with whom they would like to live.

Legacy Homes separates supports from housing to allow individuals to dictate their own supports without jeopardizing their housing situation. The Legacy Homes support model is driven by a person-led philosophy designed to put control into the hands of the tenant and their circle. Tenants can have visitors, indicate with whom they want to live,

<sup>14</sup> Canadian Association for Community Living (2019). My Home My Community: Conceptualizing 'Housing Inclusivity' A review of literature on housing, inclusion and developmental disability: 16.

<sup>15</sup> Canadian Association for Community Living (2019). My Home My Community: Conceptualizing 'Housing Inclusivity' A review of literature on housing, inclusion and developmental disability: 16.

<sup>16</sup> Canadian Association for Community Living (2019). My Home My Community: Conceptualizing 'Housing Inclusivity' A review of literature on housing, inclusion and developmental disability: 16.

<sup>17</sup> Canadian Association for Community Living (2019). My Home My Community: Conceptualizing 'Housing Inclusivity' A review of literature on housing, inclusion and developmental disability: 16.

receive overnight guests and come and go as they please if they are able to do so independently.

While the support circle often includes paid support staff, it is important to note that the support circle also includes by majority friends and family. This helps individuals achieve inclusion by surrounding them with a committed network of people who care about them and advocate their will and preference.

### 6.2.2 Household<sup>18</sup>

Indicators within the Household Domain:

- Suitability
- Affordability
- Tenure Security
- Digital Connection

This domain refers to the capability of the household for an individual to access suitable, affordable, secure housing that meets the needs of all household members<sup>19</sup>. A household is defined by Statistics Canada as “a person or group of persons who occupy the same dwelling. The household may consist of a family group such as a census family, of two or more families sharing a dwelling, or a group of unrelated persons or a person living alone.”<sup>20</sup>

Within this domain is the examination of the suitability of housing based on household size. Housing suitability can be determined from whether a dwelling has enough bedrooms for the size of household. CMHC's definition of suitable housing requires one adult per bedroom, unless they are a co-habiting adult couple in which case two adults per bedroom is permitted.<sup>21</sup> At the household level, the size and type of dwelling will impact an individual's likelihood of experiencing social exclusion.<sup>22</sup> Inadequate housing that does not provide sufficient space can impact daily liveability and increase social exclusion, loneliness, and poor health outcomes for members of the household.<sup>23</sup>

All of the homes that Legacy Homes operates are in compliance with CMHC's suitability requirements.<sup>24</sup> This means that there is no overcrowding occurring which could negatively affect a person's inclusivity by creating a barrier to accessing social and community services.

Affordability is an important aspect of inclusivity. Households experiencing housing affordability challenges are substantially more likely to experience social exclusion than households that are not spending more than 30% of their income on housing.<sup>25</sup>

<sup>18</sup> Canadian Association for Community Living (2019). My Home My Community: Conceptualizing 'Housing Inclusivity' A review of literature on housing, inclusion and developmental disability: 18.

<sup>19</sup> Canadian Association for Community Living (2019). My Home My Community: Conceptualizing 'Housing Inclusivity' A review of literature on housing, inclusion and developmental disability: 18.

<sup>20</sup> (Canada. Statistics Canada, "Data Dictionary" <https://www12.statcan.gc.ca/census-recensement/2016/ref/dict/households-menage007-eng.cfm>

<sup>21</sup> CMHC. "Housing in Canada Online" [https://cmhc.beyond2020.com/HiCODefinitions\\_EN.html#\\_Suitable\\_dwellings](https://cmhc.beyond2020.com/HiCODefinitions_EN.html#_Suitable_dwellings)

<sup>22</sup> Stone, W., et al. "Housing and social inclusion: a household and local area analysis," AHURI Final Report No.207, (2013): 50.

<sup>23</sup> Stone, W., et al. "Housing and social inclusion: a household and local area analysis," AHURI Final Report No.207, (2013): 51.

<sup>24</sup> CMHC. "Housing in Canada Online" [https://cmhc.beyond2020.com/HiCODefinitions\\_EN.html#\\_Suitable\\_dwellings](https://cmhc.beyond2020.com/HiCODefinitions_EN.html#_Suitable_dwellings)

<sup>25</sup> Stone, W., et al. "Housing and social inclusion: a household and local area analysis," AHURI Final Report No.207, (2013): 50.



Currently all of Legacy Home's housing are affordable to tenants. If a home is unaffordable, Legacy Homes has a number of methods it can employ to reduce the amount of a tenant's monthly payment – for example, through a housing allowance.

Tenants have security of tenure with Legacy Homes through their lease agreement. Unlike a standard lease agreement, the Legacy Homes lease includes a clause protecting the tenants from eviction as long as they continue to pay their rent.

### 6.2.3 Dwelling<sup>26</sup>

This domain examines how the built environment of a person's home will either present or eliminate barriers to participation and independence.<sup>27</sup> The connection between this domain and inclusion is fundamental: if one's living environment is inaccessible, both living within the home and leaving to access the community become difficult.<sup>28</sup>

Physical barriers can restrict an individual from participating in the community and result in social exclusion.<sup>29</sup> Barriers to accessibility include trouble opening doors, difficulty using the stairs, and issues simply getting in and out of the home.<sup>30</sup> For example, a doorway that has not been made wide enough to accommodate a wheelchair becomes a barrier.<sup>31</sup> An inaccessible home can restrict an individual's access to important services – and social connections.

Many of the houses owned by Legacy Homes are single detached homes that are not currently wheelchair or otherwise universally accessible. This limits the ability of

Indicators within Dwelling Domain:

- Accessibility
- Adequacy
- Adaptability

individuals with physical disabilities or dual diagnoses to move into the houses if they become vacated. In addition, it could become an issue as residents age. However, the existing tenants do not currently require physical accessibility modifications, and as Legacy Homes is the owner, homes could be adapted in the future should the need arise.

<sup>26</sup> Canadian Association for Community Living (2019). My Home My Community: Conceptualizing 'Housing Inclusivity' A review of literature on housing, inclusion and developmental disability: 19.

<sup>27</sup> Canadian Association for Community Living (2019). My Home My Community: Conceptualizing 'Housing Inclusivity': A review of literature on housing, inclusion and developmental disability: 19.

<sup>28</sup> Canadian Association for Community Living (2019). My Home My Community: Conceptualizing 'Housing Inclusivity' A review of literature on housing, inclusion and developmental disability:19.

<sup>29</sup>European Disability Forum, "Disability and Social Exclusion in the European Union: Tune for change, tools for change," (2002):6. [http://sid.usal.es/docs/F8/FD07040/disability\\_and\\_social\\_exclusion\\_report.pdf](http://sid.usal.es/docs/F8/FD07040/disability_and_social_exclusion_report.pdf).

<sup>30</sup>Canadian Mortgage and Housing Corporation, "Maintaining Seniors' Independence Through Home Adaptations a self-assessment guide," (2016):3.

<sup>31</sup> City of Toronto, "Accessibility Design Guidelines" (2004): 52.



### 6.2.4 Structure<sup>32</sup>

Indicators within Structure Domain:

- Resident Mix
- Social Connection
- Linkage to community supports and services

The structure domain evaluates how the building itself allows for the integration of tenants with a developmental disability in the community.<sup>33</sup> For example, is the building made up of only people with a disability or people without a disability? Are tenants with a disability congregated together on one floor of the building?

Having only individuals with a disability in a building, or in an area of the building, would make for a less inclusive living situation.<sup>34</sup> Disability advocates and experts with lived experience note that concentrating people with development disability together on the basis of that single characteristic makes it harder for people without disabilities to 'see' the individual past the disability, increasing the likelihood of stigmatization and social exclusion. This approach is consistent with research findings that indicate that "non-congregated housing in the community is a fundamental condition for social inclusion, self-determination, and wellbeing of people with intellectual disabilities."<sup>35</sup>

The approach taken by Legacy Homes is consistent with the disability community's vision for full inclusion in community. Almost all tenants live in single detached one-floor bungalows, with two residents in condominium apartments. Tenants have a "home of their own" and are not congregated in one building or area of town but live in the community similar to any other resident in the town. This approach is highly inclusive as it supports people with a developmental disability to live where and with whom they want to live.

One disadvantage of the location is that tenants may find it difficult to form organic connections in the community, due to the rural location of some of the tenants and lack of transportation. Still, this location was chosen as directed by the tenant and their circle based on the will and preference of the individual.

### 6.2.5 Neighbourhood<sup>36</sup>

Indicators within Neighbourhood Domain:

- Proximity to Services
- Safety

The neighbourhood and its amenities can either present barriers or opportunities for people with developmental disabilities to engage in and be safe in their communities.<sup>37</sup>

Locating housing in a walkable neighbourhood can have important implications for inclusion. A feature of walkable neighbourhoods is having close proximity to services.

Studies suggest that walkable neighbourhoods are healthier than non-walkable

<sup>32</sup> Canadian Association for Community Living (2019). My Home My Community: Conceptualizing 'Housing Inclusivity' A review of literature on housing, inclusion and developmental disability: 20.

<sup>33</sup> Canadian Association for Community Living (2019). My Home My Community: Conceptualizing 'Housing Inclusivity' A review of literature on housing, inclusion and developmental disability.

<sup>34</sup> BC Non-Profit Housing Association, "Exploring Housing Options for People with Developmental Disabilities in BC," 17.

<sup>35</sup> Wiesel, Ilan, "Housing for People with Intellectual Disabilities and the National Disability Insurance Scheme Reforms." Research and Practice in Intellectual and Developmental Disabilities, 2:1, (2015): 46.

<sup>36</sup> Canadian Association for Community Living (2019). My Home My Community: Conceptualizing 'Housing Inclusivity' A review of literature on housing, inclusion and developmental disability: 23.

<sup>37</sup> Canadian Association for Community Living (2019). My Home My Community: Conceptualizing 'Housing Inclusivity' A review of literature on housing, inclusion and developmental disability: 23.

neighbourhoods as they encourage diverse modes of transportation other than driving, such as walking, bicycling or using transit. By encouraging more people to walk or be physically active, walkable neighbourhoods facilitate social interaction, social inclusion and access to jobs<sup>38</sup>.

Having a low crime rate is especially important when examining inclusion for persons with a developmental disability who face high rates of violent victimization. A real or perceived lack of safety among one's neighbours is an obvious barrier to inclusion.<sup>39</sup> Feeling safe is important for populations with and without disabilities to be able to access their community and community supports. When a person has a positive perception of their own safety, they are less likely to be fearful of being victimized by crime. However, when an individual is concerned for their safety, they are less likely to participate in their communities, leading to social exclusion<sup>40</sup>.

The homes profiled in this case study are situated in a rural setting with very low crime scores. Due to this rural setting, the homes are also in low walkability areas with limited access to public transportation and services. Members of the tenants' support circle and/or paid staff are available to drive tenants to appointments and community activities.

It is important to note within the neighbourhood domain that while urban locations can provide many benefits such as walkability and transit, urban living is not a preference for everyone. For example, one the tenants found that his home was too urban and moved into a Legacy Homes house to be in rural setting that was more to his preference, as it gave him more room to garden and to do the activities he enjoyed.

### 6.2.6 Conclusion

Applying the Housing Inclusivity Framework to the Legacy Homes initiative shows that it contributes to a person's social inclusion. Legacy Homes performs very well throughout the framework and the high performance in the majority of domains is a clear reflection of the intentionality toward inclusion Legacy Homes stakeholders have shown throughout each stage of development and implementation. The remote location of some of the homes can make it difficult to make social connections; this is offset by the use of a support circle, or linkages to community organizations. Rather than pose barriers to a person's inclusivity, Legacy Homes housing contributes to socially inclusive outcomes for those that live in them. Legacy Homes consistently uses person-centered planning and a supported decision-making model which allows the individuals to make their own decisions about where, with whom, and how they want to live.

## 7.0 Lessons Learned and Opportunities for Scale

<sup>38</sup> Hulse, K., Jacobs, K., Arthurson, K. and Spinney, A. "At home and in place? The role of housing in social inclusion," AHURI Final Report No. 177, (2003): 24.

<sup>39</sup> Canadian Association for Community Living (2019). My Home My Community: Conceptualizing 'Housing Inclusivity' A review of literature on housing, inclusion and developmental disability: 24.

<sup>40</sup> The Smith Institute, "Communities Social Exclusion and Crime," 76.

In this section, the observed lessons learned are described and a number of opportunities to replicate the Legacy Homes approach for inclusive housing throughout Canada are identified.

## 7.1 Lessons Learned

Through conversations with project representatives, support circles, and paid support staff, a number of lessons learned were identified that other organizations pursuing similar initiatives should take into consideration.

The most important lesson learned by the project representatives is that this model might not be feasible for all families. It requires significant time investment and it is crucial that all the key decision makers have the same values to keep everyone aligned toward the goal. This can be assessed by conducting sufficient consultation with families, circles, and support workers.

It was mentioned it is important that the housing corporation has at least one paid staff. Currently the Legacy Homes Board of Directors is finding it increasingly complicated to continue the organization on a volunteer driven basis. A steady and sustainable funding stream should be identified at the beginning of the project to ensure long-term sustainability.

Lastly, it was mentioned it would have been good to formalize procedures on paper at the outset of the initiative, so they can be passed on to new generations.

## 7.2 Opportunities for Replication

The Legacy Homes initiative has been able to approximate homeownership for people with a developmental disability, and there are a number of aspects in this initiative that would be suitable for replication and scale throughout Canada.

### 7.2.1 Opportunities for Replication and Scale

The idea to use a corporation to purchase a home on behalf of an individual with a developmental disability is a positive “work around” to a common barrier where people with developmental disabilities may struggle to legally obtain a mortgage due to perceived contractual capacity. In addition, the purchased homes remain in the chosen community and are dedicated to individuals with developmental disabilities even after the current tenant has moved out.

The intensive consultation conducted by the Legacy Homes team, in particular during the early stages of the project, helped the partner organizations to develop a common belief system that has assisted in navigating significant challenges throughout the course of the project.

### 7.2.2 Drawbacks

While there are a number of opportunities that became evident from this case study, there are also a number of drawbacks compared to other development pathways. Much of the success of Legacy Homes is related to the trust between BDACI, families,

and Legacy Homes. For example, while supported decision-making is recognized in some provinces (to date, in various models - Manitoba, British Columbia and Alberta) and experimented with throughout Canada, Ontario and other provinces and territories currently lack a legal framework to formally support the approach. While Article 12 of the UN Convention on the Rights of Persons with Disabilities and the considerable research on legal capacity by the Canadian disability community provides some structure for implementation, a strong bond of trust between the tenants, families and the organization is necessary to compensate for this lack of legal framework and avoid any legal challenges to the model. It is the strong bond between the support circles and Legacy Homes that make the model so successful. Other groups looking to replicate this initiative should carefully assess the risks that a trust-based model could expose them to and evaluate if they are comfortable taking these risks or explore approaches to mitigating the risks.

The Legacy Homes model depends on family equity that can be used to invest in a new home. Not every family has this capital available, limiting the number of families who could participate in this model. In addition, the donation each family makes to the corporation to facilitate the purchase of the home cannot be recovered after the tenant moves out. Many families may not be willing to make an investment that cannot be recovered. Groups who are more concerned about equity could consider a traditional life-lease model that does build equity over time, but this might also limit the ability to secure rent subsidies and development grants to improve affordability for tenants.

While many of these concerns could be overcome through long-term community and internal engagements, they require effort and determination from new organizations as they consider replicating all or some of the Legacy Homes initiative.

## 8.0 Appendices

### 8.1 Appendix A: Case Study Approach

This section describes the research team's approach to collecting data and engagements conducted during this study.

#### 8.1.1 Lines of Inquiry

To guide all the research activities, the following lines of inquiry were developed for this case study:

**Table 1:** Lines of Inquiry

<p><b>Project relevance</b></p> <ul style="list-style-type: none"> <li>What makes this project stand out compared to other housing models for individuals with developmental disabilities?</li> </ul> <p><b>Development Process</b></p> <ul style="list-style-type: none"> <li>What were the key stages in the development journey of the demonstration project?</li> <li>What is the governance structure of the demonstration project and what are the benefits of this governance model?</li> <li>Who were the key stakeholders involved in the development process; what roles did they play?</li> <li>What were the key challenges and lessons learned in the development process?</li> <li>Were there any challenges in the tenant selection for each demonstration project and how were these overcome?</li> <li>What was the collaboration experience like between multiple partners and stakeholders?</li> <li>How could this process be replicated in other communities?</li> </ul>	<p><b>Supports</b></p> <ul style="list-style-type: none"> <li>What is the experience of residents with the delivery method of supports?</li> <li>What levels of support can be delivered in the demonstration project?</li> <li>How were the supports as well as the community linkages developed to promote the inclusion of individuals with developmental disabilities in the wider community?</li> </ul> <p><b>Impact</b></p> <ul style="list-style-type: none"> <li>What was the housing and support situation like of residents before they became involved with the demonstration project?</li> <li>What is the impact of the demonstration project on residents and their families?</li> <li>To what extent have the residents been able to reach their short, medium and long-term goals (including supports, employment opportunities, community engagement, life skills and self-esteem, improved housing, etc.)?</li> </ul>
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#### 8.1.2 Sources of Information

To answer the lines of inquiry identified above, a number of data collecting activities were undertaken as part of the development of this case study. The data collecting process was conducted in two phases. The first phase involved transferring readily available data from Legacy Homes to the consulting team while the second phase

consisted of a number of engagements with the Legacy Homes team, tenants, their family/circle, and support staff.

### Collecting Readily Available Information

The research team submitted an information and data request to Legacy Homes in April 2019. This list included a request for relevant documentation and background reports as well as quantitative data such as the number of tenants supported, their age, rent ranges etc.

As the Legacy Homes organization is predominantly volunteer and parent driven, less information was formally documented over time - knowledge was predominantly transferred verbally. Where possible, this was compensated for during the engagements.

### Engagements

In addition to the readily available data, a total of five engagements were conducted with a range of key informants. This includes the following sessions:

1. One session with project representatives and key decision makers was conducted on July 11<sup>th</sup>, 2019. A total of three people participated in this session.
2. Three sessions with tenants and their circles were conducted on July 12<sup>th</sup>. A total of eleven people participated in these sessions.
3. An interview with the legal consultant of Legacy Homes was conducted on Friday August 9<sup>th</sup>.

A total of 15 individuals were interviewed or participated in an engagement session. For an overview of each session's format, questions and materials, see Appendix B of this report.

## 8.2 Appendix B: Data Needs List & Engagement Guide

Appendixes and video documentary to support this case study are available on the My Home My Community website: [www/myhomemycommunity.ca](http://www.myhomemycommunity.ca)