

PARTICIPATORY PLANNING OF HOUSING FOR OLDER PERSONS:

TWO TELEVISED CASE STUDIES

By

CHERYL JOYCE KATHLER

B.A., Simon Fraser University, 1980

A THESIS SUBMITTED IN PARTIAL FULFILLMENT OF

THE REQUIREMENTS FOR THE DEGREE OF

MASTER OF ARTS

in

THE FACULTY OF GRADUATE STUDIES

School of Community and Regional Planning

We accept this thesis as conforming

to the required standard

THE UNIVERSITY OF BRITISH COLUMBIA

April 1987

© Cheryl Joyce Kathler, 1987

In presenting this thesis in partial fulfilment of the requirements for an advanced degree at the University of British Columbia, I agree that the Library shall make it freely available for reference and study. I further agree that permission for extensive copying of this thesis for scholarly purposes may be granted by the head of my department or by his or her representatives. It is understood that copying or publication of this thesis for financial gain shall not be allowed without my written permission.

Department of School of Community & Regional Planning

The University of British Columbia  
1956 Main Mall  
Vancouver, Canada  
V6T 1Y3

Date April 25, 1987

Research Supervisor: J. David Hulchanski

ABSTRACT

"Population aging" is a worldwide occurrence facing both developed and developing countries alike. In Canada, significant public policy issues arise with the increasing number and proportion of older persons. One of the most important of these is meeting the housing needs of the more than one million older persons facing housing decisions in the next three decades. The greatest challenge to all those involved in producing, financing or managing housing for older persons is to assist the majority of older persons in their desire to remain in the community as they age.

The underlying premise of this explorative study is that older persons should and must be involved at all levels of planning current and future seniors' or retirement housing. The specific purpose of the thesis is to explore "collaborative planning" as a method of involving older persons in housing issues. The rationale for the participation of older persons is developed from the review of three areas of relevant literature. In contrast to the literature on "environment and aging" and gerontology, this study seeks an understanding of the broader social, political-economic forces as prerequisite to meaningful analysis of the lower levels of the housing context. This wider perspective also forms the basis for the rationale of including older persons in the planning process.

A discussion of "participation" as a process and a movement provides an introduction to two case studies as examples of "collaborative planning" involving older persons and professionals in discussing seniors' or retirement housing.

The thesis research question is:

What do older persons view as their housing needs and preferences, and how successful is present seniors' or retirement housing in meeting these?

The structure, format and objectives of the two case studies were framed within the thesis principles and assumptions in addition to this question. The case studies were assessed for their usefulness for defining housing needs and preferences of older persons, and for examining how closely these stated needs and preferences fit existing housing alternatives. The evaluation of the case studies revealed that collaborative planning took place, and that the stated objectives of each event and those of the sponsoring organization were met. The thesis assumptions and premises were thereby substantiated. The wide impact and numerous outcomes of the case studies within the seniors' communities were also noted. However, the research question was largely unanswered in terms of "product", and the analysis includes some possible explanations.

Analysis of the case studies within the broader context indicated that older persons and professionals alike are in a "reactive" mode of thinking rather than creative or "proactive" in what they visualize as seniors' housing options. Entrenched thinking and attitudes are difficult to change, and as this study concludes, education of all involved is necessary. The greater necessity is, however, the need to personalize the issue of inadequate and unsuitable seniors' or retirement housing, so that change is seen as imperative to one's own future life as an older person.

## TABLE OF CONTENTS

ABSTRACT .....	ii
TABLE OF CONTENTS .....	iv
LIST OF TABLES AND FIGURES .....	vi
ACKNOWLEDGEMENT .....	vii

### CHAPTER ONE: INTRODUCTION

1.1 Purpose.....	1
1.2 Definitions.....	1
1.3 Context.....	2
1.4 Significance.....	4
1.5 Thesis Principles.....	6
1.6 Research Questions and Objectives.....	8
1.7 Thesis Organization.....	10

### PART I : BACKGROUND..... 13

#### CHAPTER TWO: THEORY - ENVIRONMENT AND AGING

2.1 Orientation to Place.....	14
2.2 Orientation to Design.....	15
2.3 Orientation to Social and Psychological Processes.....	15
2.4 Orientation to Environmental Policy.....	17
2.5 Dominance of Micro- Over Macro-Environment.....	22

#### CHAPTER THREE: THE CANADIAN CONTEXT

3.1 Demographic Shifts.....	25
3.2 Housing Characteristics.....	30
3.3 Inaccurate Assessment of Housing Needs and Preferences.....	33

#### CHAPTER FOUR: THE MACRO-CONTEXT - SOCIAL, POLITICAL AND ECONOMIC ASPECTS

4.1 Social Bias.....	38
4.2 Political-Economic Context of Housing.....	42
4.3 Structural Analysis.....	47

#### CHAPTER FIVE: PARTICIPATION

5.1 Development of Participation.....	53
5.2 Types of Participation.....	56
5.3 Effects of Participation.....	59
5.4 Planning Practices.....	60
5.5 Examples of Participation.....	66

5.6 Rationale for Participation.....	73
5.7 Re-professionalization.....	75
5.8 Research Premises for Case Studies.....	78
 PART II : THE CASE STUDIES.....	 81
 CHAPTER SIX: THE CASE STUDY EVENTS	
6.1 Rationale.....	82
6.2 Case Study One: Retirement Housing Forum.....	87
6.3 Case Study Two: Retirement Housing Alternatives Workshop.....	90
6.4 Summary.....	93
 CHAPTER SEVEN: EVALUATION AND FINDINGS: PROCESS, PERFORMANCE AND PRODUCT	
7.1 Introduction.....	94
7.2 Case Study One: Retirement Housing Forum.....	96
7.3 Case Study Two: Retirement Housing Alternative Workshop.....	105
7.4 Outcomes of the Case Study Events.....	112
7.5 Evidence of Collaborative Planning.....	118
 PART III : INTEGRATION.....	 121
 CHAPTER EIGHT: ANALYSIS OF CASE STUDIES.....	 121
 CHAPTER NINE: SUMMARY AND CONCLUSIONS	
9.1 Summary.....	131
9.2 Conclusions.....	134
 REFERENCES.....	 138
 APPENDICES	
A Types of Independent Housing.....	151
B Range of Housing Alternatives.....	153
C A Chronology of Federal Housing Programs.....	161
D Terms of Reference, Liaison Committee, Gerontology Association of British Columbia.....	171
E Retirement Housing Forum - Programme.....	173
F Gerontology Association of British Columbia Report on The Retirement Housing Forum - Recommendations.....	175

# LIST OF TABLES AND FIGURES

## TABLES

TABLE I	Population in Selected Age Groups, Canada, 1950-1980, 1985-2025.....	28
TABLE II	Total Population Aged 65+ - Canada & Provinces 1981.....	31
TABLE III	Total Population and Population Aged 65+: G.V.R.D., 1981.....	32

## FIGURES

FIGURE 1	Environmental Press Model.....	16
FIGURE 2	Person-Environment Interaction.....	18
FIGURE 3	Models of Human-Environment Transaction & Research.....	19
FIGURE 4	Major Theoretical Models in Man-Environment Studies.....	21
FIGURE 5	Ecological Housing Model.....	23
FIGURE 6	Percentages of Total Population Aged 65 and Over.....	26
FIGURE 7	Percentages of Total Population in Selected Age Groups 1951-2021.....	27
FIGURE 8	Number and Percentage of Total Population Aged 65 and Over, Aged 80 and Over, for Selected Urban & Rural Areas, Canada, 1981.....	29
FIGURE 9	Citizen Participation Ladder.....	57
FIGURE 10	Model of Actors in The Housing Process.....	61
FIGURE 11	Quadrant Model of Participation and Decision-Making.....	67
FIGURE 12	Decision Pyramid.....	126

## ACKNOWLEDGEMENTS

Many people have contributed to the process of this thesis.

Firstly, I would like to express gratitude and appreciation for the guidance, encouragement and support of my advisers, Professor J. David Hulchanski and Dr. Beverly Burnside. I am also grateful to Professor Henry Hightower for his interest and comments.

I thank the Gerontology Association of British Columbia (G.A.B.C.) for its financial support of the events which formed the thesis case studies, and I am especially grateful for the generous support and time given by G.A.B.C. Liaison Committee members. I also thank the numerous volunteers, professionals and older persons throughout the Vancouver area who participated in the case study events.

I also acknowledge the support I have received through the Canada Mortgage and Housing Corporation Graduate Scholarship Program.



## CHAPTER ONE

### INTRODUCTION

One of the most important challenges facing Canada in the next few decades is the aging of the population. Meeting the housing and social needs of an increasingly diverse and numerous older population will become a significant focus of public policy. Enlarging the range of housing options for older persons invites creative, innovative planning practices which can only be successful through the participation of older persons.

#### 1.1 Purpose

This thesis explores the usefulness of two forms of collaborative planning for defining 1) housing needs and preferences from the perspective of older persons, and 2) examining the fit between these self-defined needs and preferences and the existing housing alternatives.

#### 1.2 Definitions

For the purposes of this thesis, the following key terms are defined:

"Older persons" is used in lieu of "senior citizens", "the aged", "the elderly", as a neutral term for meaning any of the following: retired person, an individual over age 65 unless otherwise specified, someone receiving a pension based on age or retirement from employment.

"Senior" has a similar connotation.

"Professional(s)" defines persons with specialized training and knowledge who work independently, in companies or in government.

"Seniors' housing" is a term meaning housing that is specifically built or designated for older persons. "Retirement housing" is a more current term with the same definition.

"Participation" is defined as involvement in the planning or design processes by specific users or by individuals similar to potential users. "Senior participation" denotes participation by older persons.

"Collaborative planning" means a planning process undertaken by planners or other professionals in cooperation with non-professionals. In the housing field, collaborative planning includes those who are the consumers or users of the housing which ultimately results.

"Ageism" is arbitrary discrimination against older persons which is derived from actual or perceived inequalities and is based on age and social status.

### 1.3 Context

Housing options for older persons can be represented as a continuum defined by degrees of support ranging from independent living to highly dependent institutionalization (Brink 1985). Currently available housing meets the needs of both the independent and dependent older population with varying success. Within the range of options for independent living, much of the rationale for providing more and new alternatives is based on the perceived need for options to fill the gap between independent and dependent living, with an emphasis on community living. Although alternative housing encompasses a wide range of options, the

thesis will confine its discussion to those housing alternatives which fit the needs and preferences of independent and semi-independent older persons.

While the objective of British Columbia's Long Term Care program is to maintain persons as long as possible in their community homes, the dwellings themselves are often unsuitable, substandard, physically unsafe, as well as costly and difficult to maintain. There are few options to consider other than institutionalization, particularly for lower income persons, and fewer that have successfully met social needs; loneliness continues to be epidemic among many who are physically well-housed. (Canada N.A.C.A., 1982)

Policy makers and programme administrators have generally failed to recognize the role which older persons can play in decision-making regarding many aspects of their lives. The knowledge, experience and judgement of older persons are also not valued as resources in setting housing policy goals and objectives, nor in the planning and design of retirement housing. The exclusion of older persons in policy and planning reflects the patronizing attitude toward older people and negativity about aging widely held in our society. If ageist attitudes are to be countered, older persons must be involved in decisions which affect them. Therefore, in this thesis, the perspective of older persons is the basis of inquiry, both in the background discussion and in the case studies.

#### 1.4 Significance

While demographic projections are subject to several uncertainties (Stone and Fletcher 1980, 8; Gutman et al. 1986, 2), they indicate that the proportion and the absolute numbers of older persons in Canada is rising steadily and will peak early in the next century when the post-war baby-boom generation reaches old age and comprises an estimated 20% of the total population. These demographic trends hold important implications for housing policy and support services since many of this increase will probably live independently and semi-independently in the community, following the pattern of approximately ninety percent of the current older generations (Gutman et al. 1986).

Although the proportion of older persons has been increasing for a number of years, there seems to be little awareness evident in current housing of the varying characteristics, needs and preferences of this societal group. The tendency to assume that older people comprise a homogeneous group with uniform preferences and needs has translated into a limited range of available housing options (see Appendix A). Currently, there is ample room for creative, innovative solutions to housing needs of those now old. Predicted changes in the characteristics of future cohorts of older persons (ie. better education, income and health, and higher expectations) will mean changed expectations in housing standards and lifestyles (Rapelje 1981). However, as developed in the thesis argument for increased participation of older persons in planning practices, rudimentary knowledge and understanding of the housing needs and preferences of today's older cohorts has hindered the development of suitable housing for upcoming older generations.

The trend toward increasingly tight government fiscal policies and

competition for scarce financial resources heightens the implications of demographic changes. Financing income and support services for large numbers of older persons, concurrent with lessened government abilities and receptivity to meeting such basic needs, will further limit the scope and depth of diminishing housing programmes. The above trends reinforce the position underlying the thesis: it is necessary to understand the implications of an aging society and develop ways to ameliorate current and future housing inadequacies.

The recent Macdonald Commission report (Royal Commission 1985) stressed the need for effective use of social expenditures. It also noted the diminishing consensus amongst Canadians regarding social policy. Providing a means by which older persons can be involved in meaningful consultation in the process of developing housing policy, programmes and projects, can enhance public support and policy consensus. Among others, the authors of the Macdonald Commission report have suggested that those best able to judge the optimal delivery of a social service, such as housing, are the users or consumers of that service. More efficient and targetted housing programmes as well as greater public awareness and understanding of the political process should result from senior participation.

Creating a role for older persons in planning and developing housing alternatives also would counter ageist attitudes and assert the right of older persons as members of society to their share of societal resources. Both government-assisted housing and market-developed housing that suits the needs and preferences of older consumers should also ultimately result.

The current level of participation by older people in decisions

regarding housing issues ranges from non-participation to a limited "feedback" role. In general, older persons receive services and are not usually consulted unless to provide reaction to services or products. Higher levels of participation would range from implementation or support for decisions and administrative decision control to full participation in decision-making in executing decisions. The intention of the thesis is to explore ways in which the participation of older persons in housing may be increased.

### 1.5 Thesis Principles

In addition to the foregoing premises, the thesis is based upon the following principles:

1. There is a need for productive contribution by older persons in areas that concern them and future older generations;
2. There is a need to facilitate worthwhile roles for older persons and enhance the image of aging;
3. The government and wider society have a responsibility to inform and include older persons, particularly in decisions which affect them;
4. Older persons have a responsibility to be contributing members of society;
5. Citizen participation is important in the housing planning and development process.

These principles reiterate two of the imperatives stated by the National Advisory Council on Aging:

- a) Older Canadians must be functional, useful and integrated into society;

b) Older Canadians must be involved in the development of programmes which affect them. (1983, 18)

Participatory rather than paternalistic forms of activity for its aging population are worthy of a maturing nation. Meaningful contribution by current older persons will enhance the housing of this and future older generations (Crawford 1981), and exhibit recognition of the responsibility of older persons to society. Participation by older citizens in housing development and planning will also assist government and other groups in society to be responsible and accountable to society individually and collectively in their policies and programmes.

In searching for and creating suitable and affordable housing, older persons have experience and knowledge to offer. Generating a wider range of housing choices can best proceed with their participation. Furthermore, the concerted effort required to meet the housing needs of current and future older Canadians cannot occur without meaningful participation of older persons at many levels in the planning and development of housing.

In summary, the thesis is based on the assumptions that through participation of older persons:

- i) housing needs and preferences can be made known and fully incorporated into the housing design and planning process;
- ii) ageism at all levels in the social, political and economic context can be confronted;
- iii) older persons can begin to take full civic responsibilities and society can provide opportunities for full integration of older persons.

## 1.6 Research Questions and Objectives

The thesis involves exploration of collaborative planning as a method of involving older persons in the planning of seniors' housing at the level of policy, programme and design. Prior to presentation of two case studies, literature is reviewed from three relevant areas.

"Environment and aging" provides a theoretical basis for the study and introduces a background discussion of Canadian demographic and housing statistics. An examination of the social, political and economic context follows. A review of types and effects of "participation" and present planning practices in housing integrates the foregoing discussions. The following questions are also examined in the introductory chapters of the thesis:

1. What are the social, political and economic contexts of seniors' housing issues?
2. What gaps currently exist in seniors' housing?
3. How has collaborative planning included older persons in housing planning and development processes?

The research question which generates the case studies is: What do older persons view as their housing needs and preferences, and how successful is present seniors' or retirement housing in meeting these? Two collaborative planning processes as case studies were chosen as the structure for seeking an answer to the thesis question. The goals and objectives of each case study were framed within the research question, principles and assumptions. Exploration of these questions provide substance for the main thesis objective: to examine the extent to which collaborative planning, through its process and its outcomes, can facilitate:



- a) better knowledge about older persons housing needs and preferences;
- b) a process that creates knowledge and understanding between both professionals and seniors so that needs and preferences expressed by older persons may be ultimately incorporated into more suitable retirement housing;
- c) changing attitudes toward the status and roles of older persons in planning and other areas.

Thus the thesis is concerned with (1) process - how to elicit knowledge and understanding about older persons housing needs and preferences, and (2) product - findings and outcomes of the collaborative planning process. The thesis is exploratory in both focus and methodology and therefore it does not attempt to test hypotheses. However, findings and evaluation of the method as process and product are suggestive of further areas of study and future possibilities for collaborative planning practices involving older persons.

This study should be of value to policy analysts and planners in municipal, provincial and federal governments as well as non-profit and community-based groups involved with housing policy, programmes and projects for older persons.

The findings should also serve as a resource for housing developers and researchers interested in consumer "feedback" regarding housing preferences. More importantly, the thesis will suggest ways of including older persons in the design and planning process through its assessment of two forms of participation.

The thesis research should also have impact on the thinking and lives of older persons who have been involved as participants. In

addition, future benefits will accrue to older persons and to society in general from the growth of knowledge, awareness and understanding of the older consumers' point of view.

The implementation of the findings of this study and adoption of collaborative planning practices by government, and government agencies (B.C.Housing Management Commission-B.C.H.M.C., and Canada Mortgage and Housing Corporation-C.M.H.C.), and by the private sector (design and planning consultants) is a longer-range ultimate goal.

Recording of the case study events on video-tape (available from the thesis author or the Gerontology Association of British Columbia) enhances the utility and replicability of the study's findings. Finally, it is hoped that the methodology and outcomes will stimulate professionals and non-professionals of all ages to engage in further dialogue and cooperation with older persons.

### 1.7 Thesis Organization

Part I of the thesis provides the theoretical background to the case studies. Significant aspects of the environment and aging field are reviewed in Chapter Two, revealing the lack of comprehensive theory and a focus on the immediate environment to the neglect of the broader context in which older persons interact with their environment. Chapter Three describes the demographic, housing characteristics and current knowledge regarding the housing needs and preferences of older Canadians.

In order to begin to meet the challenge of an aging population and its housing needs, an understanding of the broader context is essential. Macro-level issues which impact housing must be assessed and analyzed

before study at the more focussed levels can be meaningful. This level of understanding is sought through a social, political and economic analysis of the broader context of seniors' or retirement housing in Chapter Four.

An overview of the development of "participation" as a movement and a technique in Chapter Five provides background for the rationale of the case studies as methods of collaborative planning. Thus the chapters included in Part I identify the context of the thesis and the research question, and establish the basis for the case studies.

Part II contains three chapters which describe the case study events, their findings and outcomes, and analysis. Chapter Six outlines the rationale for selecting the two participatory events as case studies of collaborative planning. It also relates the development of each event and briefly discusses their structure, programme and participants.

Chapter Seven presents the findings of the case studies and evaluates both events according to the stated goals and objectives, and as a participatory process. The results of the events are considered together under Outcomes.

Part III provides the integrating and concluding chapters of the thesis. Chapter Eight analyses the case studies in terms of the evaluation and the results discussed in the previous chapter. It seeks an answer to the research question and provides an overall summary of the exploration by the case studies into the collaborative planning of older persons in retirement housing issues. Chapter Nine summarizes the thesis findings and analysis in terms of the thesis objectives and research question. This chapter relates the case studies to the broader context of the thesis, the fields of gerontology and environment and

aging, and participatory planning. The significance of the findings and outcomes to planning and design professionals, as well as policy and decision makers is also included.

## PART I : BACKGROUND

This segment of the thesis presents the theoretical and conceptual framework for the study. As a foundation for discussion of the broader setting of housing for older persons, literature in the field of "environment and aging" is reviewed and analyzed. Lack of comprehensive theory is revealed, with a focus on the immediate environment resulting in the neglect of the broader context of interaction whose components determine many aspects of current housing realities. An outline of demographic trends and the housing characteristics and needs of older persons as defined by the literature provide the Canadian setting of the thesis, and reveal an inaccurate understanding of housing needs and preferences of older persons. This is followed by an examination of the social, political and economic context of housing for older persons in which demographic trends and housing statistics are placed. Argument for the necessity of including older persons in planning and decision-making regarding seniors' or retirement housing is derived from this structural analysis. Collaborative planning as defined for the thesis is developed from a review of the principles and evolution of participation in design, and from the planning literature regarding public participation. The rationale for the case studies is derived from an integration of the theoretical and conceptual background, demographic trends, and current housing realities of older persons, with the assumption that collaborative planning is a viable method by which to increase the suitability and affordability of housing for older persons.

## CHAPTER TWO

### THEORY - ENVIRONMENT AND AGING

Social gerontology is a young, broad, multidisciplinary field which includes such disciplines as anthropology, architecture, communications, economics, geography, psychology and sociology. The complexity resulting from variations in the value systems, philosophy, theory and methodological orientation of these perspectives has enriched the fields of "environment and behavior" and its progeny, "environment and aging" (E-A). Just twenty years old, E-A research seeks to understand the interaction between older individuals and their environments. Early E-A study focused on the environment, evolving to concentration on the individual, to more recently, the study of person-environment interaction. There are four general orientations in E-A research: (A) place, (B) design, (C) social and psychological processes, and (D) environmental policy (Lawton, Altman and Wohlwill 1984). This is not a rigid classification since most E-A research has more than one of these orientations.

2.1 Orientation to Place or specific places or settings is the basis of most research in gerontology regarding the interaction of environment and older persons. Environmental designers and practitioners have sought knowledge to modify or create settings or buildings which fit the needs of older persons. The earlier literature in this area was almost entirely descriptive of settings (Townsend 1964). The focus of recent E-A research has been neighbourhood (Becker 1983; Regnier 1981 & 1983; Wilson 1981; Hodge 1984) and buildings (Howell 1980a & b; Faletti 1984). All of these generated design-orientated hypotheses or had design

implications.

2.2 Orientation to Design has not been derived from research. It has resulted from analogy using principles abstracted from gerontological knowledge, and tested against the behavior of users in environments. Thus design-orientated books on housing have emerged (Davis, Audet and Baird 1973; Green et al. 1975; Lawton 1975; CMHC 1983; Whiting and Woodward 1985). Research involving environmental variables such as transportation, location of resources and compensatory hardware, furniture and design (Koncelik 1982) are also included under this approach.

2.3 Orientation to Social and Psychological Processes has been the central focus of theory development in environment and aging. Several researchers have studied the progressive change brought about by the interdependent interaction of individuals with their environment.

Lewin's (1951) fundamental statement that behavior is a function of an individual and the environment ( $B=f(P,E)$ ) is incorporated into an "ecological model" by Lawton (Lawton 1975, Lawton and Nahemov 1973) which focuses on the competence of an individual to meet environmental demands ( $B=f(P,E,PxE)$ ). Competence is the combination of all traits of an individual, while the environment includes all objective (alpha), perceived (beta), physical, and suprapersonal (aggregate characteristics of neighbours) components. As can be seen in Figure 1 below, excessive demands from the environment or "environmental press" relative to competence induces stress that necessitates adaptive behavior. Inadequate demands from the environment can also lead to loss of competence or "maladaptive behavior", or to "adaptive behavior" that has "positive effect".

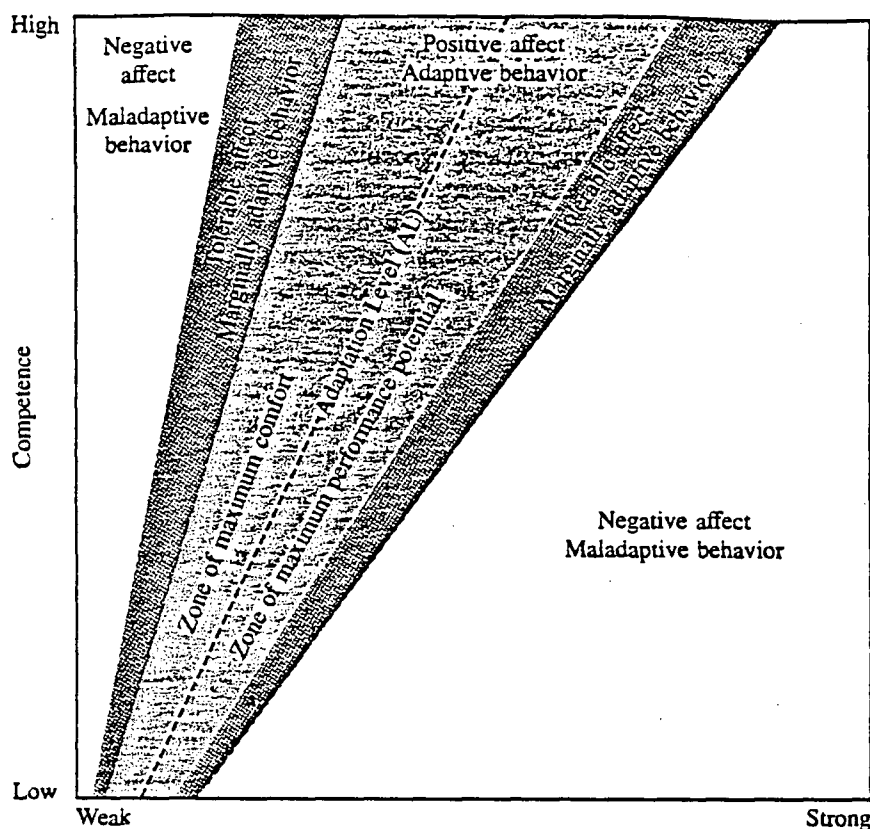


Figure 1. Environmental Press Model (From: Lawton 1980, 12)

The ideal environment produces adaptive behavior that does not strain nor disregard the competence of an older individual. Incorporated into this model is the environmental docility hypothesis (Lawton and Simon 1968) which states that the lower the competence, the greater the amount of influence environment has on behavior. While this component has been supported by research, the complexity of Lawton's ecological model has made it difficult to fully test. Nevertheless, Lawton's influence on the E-A field is unsurpassed.

Other researchers have also adopted similar concepts of competence and environment. Kahanas's concept of congruence between individuals and



their environment is derived from Murray's (1938) need-press theory. Well-being is an outcome of congruence between personal needs and perceived environmental dimensions, while behavior or outcomes vary as a function of the dimensions of congruence (Lawton, Altman and Wohlwill 1984, 6). The Carp and Carp model (1984) combines the rationale of Lawton's model with Kahana's concept, focusing on how well the environment fits the needs of individuals ( $B=f(P,E,PxE)$ ). The traits of an individual (P) interact with and influence perception of and reaction to the environment. Outcomes or behavior (B) are immediate or ultimate.

At a more applied level of research, Golant (1984) and Carp and Carp (1984) examine psychological and social processes within the context of specific places. Emphasis on psychological and social processes in relation to sense of and attachment to place by urban and rural older persons has been explored by Rowles (1978,1984).

#### 2.4 Orientation to Environmental Policy

Environmental policy or policy studies, policy planning, implementation and assessment have emerged from studies with other above noted orientations, and have become a more important aspect of E-A study. Newman, Zais and Struyk (1984) focus on demographic and financial traits of older Americans in relation to the availability of housing which thus deals directly with policy issues. Roscow's (1967) research on the consequences of age-integration of apartment buildings provides a classic example. While it began with a strong emphasis on social process, relevant findings for place, design and policy have emerged (Lawton, Altman and Wohlwill 1984). Similarly, the discussion of alternative housing options by Eckert and Murrey (1984) points both directly and indirectly to place, social and psychological and policy

issues. In general, policy implications can be discerned in all E-A study.

There are other E-A frameworks which may be defined within one or more of the orientations discussed above, but which focus on other aspects and perspectives of the interaction of persons with their environment. Parr (1980) for example, criticizes the broad, theoretical approach of Lawton and Kahana. She argues for differentiation and definition of the separate components of the person-environment (P-E) interaction in order to allow greater clarity in measuring variables and in interpretation. Her classification system of P-E interaction contains four types of variables: personal characteristics, environmental characteristics, mediators and behaviors:

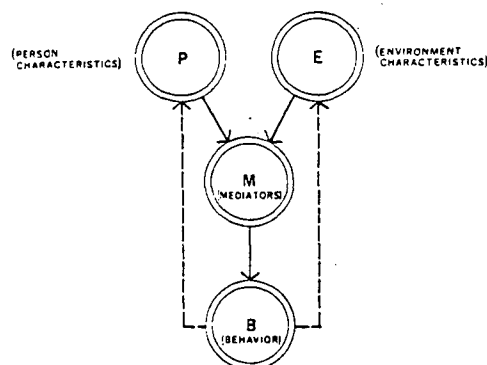


Figure 2. Person-Environment Interaction (From Parr 1980, 396)

One behavior is chosen and investigated for a variety of possible interactive influences. Thus a more sensitive understanding of the four variables and their interaction results. It can also be used as an alternative to general environment and behavior theory which has yet to emerge.

Stokols (1978) posits a two dimensional descriptive schema of four modes of person-environment transactions:

		<u>Form of Transaction</u>	
		Cognitive	Behavioral
<u>Phase of Transaction</u>	Active	<u>Interpretive</u> Cognitive representation of the spatial environment  Personality and the environment	<u>Operative</u> Experimental analysis of ecologically relevant behavior  Human spatial behavior (Proxemics)
	Reactive	<u>Evaluative</u> Environmental attitudes  Environmental assessment	<u>Responsive</u> Impact of the physical environment  Ecological psychology

Figure 3. Modes of Human-Environment Transaction and Research

(From Stokols 1978, 259)

This schema expresses an attempt to move beyond mere description of environments in order to focus more broadly on the interactions within and across various settings. Transactional interactions and optimization mentioned by Stokols as major themes in the person-environment research of the 1980's (Marshall and Tindale 1978; Sommer 1983), link conceptual and empirical aspects of a person's environment interactions. This more holistic approach marks important progress in "environment and behavior" and "environment and aging" fields.

Parr (1980) notes that one of the main reasons for the limited knowledge in both of these fields is the confusion and problems caused by overlapping global concepts such as "well-being" and "satisfaction". Thus Parr argues for clear, uniform concepts, and along with Stokols (1978) advises development of a taxonomy of environmental attributes.

Archea (1982) states that environment and behavior research has been predominately empirical, while practioners who would use such knowledge discount it due to their orientation toward rational or instrumental methods. In the scientific premise of E-A and related fields persons respond to their environments. However, designers and planners view persons as creators of their environments. Such conflict no doubt increases the difficulties of E-A theory development.

In contrast to other E-A researchers, Ittelson (1982) states that the premise of an adequate E-A theory must be the inseparability of the two components: person and environment. Both exist because of the other and each can only be defined in terms of the other (Ittelson 1982, 14). While ecological theory, systems theory and transactional theory all attempt to fill the theoretical void in E-A study, Ittelson believes that their failure is due to ommission of the "proactive" aspect of persons who, as individuals or as society, through behavior, produce or create their environments. Regardless of the necessity of this concept to the development of the E-A field, this ommission in most E-A conceptualization, models and theories is of importance to the premises of the thesis and to the development of the argument for collaborative planning. E-A researchers and others who view older persons as "reactive" in their interactions with the environment, maintain the social attitudes, thinking and practices which do not perceive older persons as capable individuals who are integrated and participate as full members of society. What is also absent in the above E-A orientations and frameworks is incorporation of the broader environment from which all other levels of environment, social characteristics, inter-relationships and interactions take place.

As the previous discussion has revealed, a substantial amount of design-relevant knowledge has been generated. The chart below shows that there are, however, few models or theories in E-A study.

MES model	Kahana	Windley	Weisman	Schooler	Lawton	Pastalan	Total
Perception and complexity	○	X	○	□	○	●	10
Cognitive image	□	□	●	○	○	X	9
Behavior setting	□	○	○	X	○	X	7
Communication symbolism non-verbal communication	X	X	X	X	X	X	0
Competence and adaptation	●	X	○	●	●	●	14
Information flow	X	X	X	○	□	○	5
Ecological models	□	○	X	X	○	X	5
Ethological models	X	X	X	X	X	○	2
Evolutionary models	X	X	○	X	X	X	2
Socio-cultural models	X	X	□	X	□	X	2
Preference in environmental quality-choice	○	X	X	X	○	○	6
Performance-based	□	X	X	□	X	●	5

● = strong & direct (3)  
○ = weak & direct (2)  
□ = implicit (1)  
X = absent (0)

Figure 4. Major Theoretical Models in Man-Environment studies (From

Rapoport 1982, 134)

As indicated in Figure 4, the existing models which emphasize psychological and social processes (see Carp and Carp 1984; Rapoport 1982), are general, and also have insufficient empirical testing to substantiate them (Lawton, Altman and Wohlwill 1984). These problems result in fundamental gaps in understanding the interactions between older persons and the environment, and highlight the lack of focus in E-A research. However, the absence of the "proactive" concept in describing how older persons interact with their environment and the prominence of study in the E-A field of micro-level environments is more important and conspicuous.

### 2.5 Dominance of Micro over Macro Environment

Not only is there a lack of comprehensive "environment and aging" or "person-environment" theory, most E-A study has dealt with older individuals interacting with or within their immediate environments. This micro-environmental perspective has precluded development of, integration with, or consideration of wider social, political and economic forces. E-A study has generally not acknowledged the dominance of the broad context in determining all social and physical aspects of the more immediate environments which any of the orientations and frameworks reviewed are derived.

The wide context forms the fourth environmental component in the ecological housing model borrowed from Lawton (1980). It is composed of four separate and interrelated levels of environment (see Figure 5):

1. Individual (personal characteristics such as behavior, life history, physical and mental competencies);

2. Microsystem (immediate environment) - Lawton (1980) viewed this environment level in terms of: a) personal or significant persons, b)

group or group pressures and social norms, c) suprapersonal or aggregate characteristics of nearby persons, and d) natural or built physical environment;

3. Exosystem (local community) - The availability of resources and services, security and social interaction at this level is of critical importance to the well-being of older persons;

4. Macrosystem (global context including political, economic and social events, forces and processes) - The profit maximization premise and priority of our mixed economy pervades all aspects of policy and society. They have profound impact on housing choice and availability.

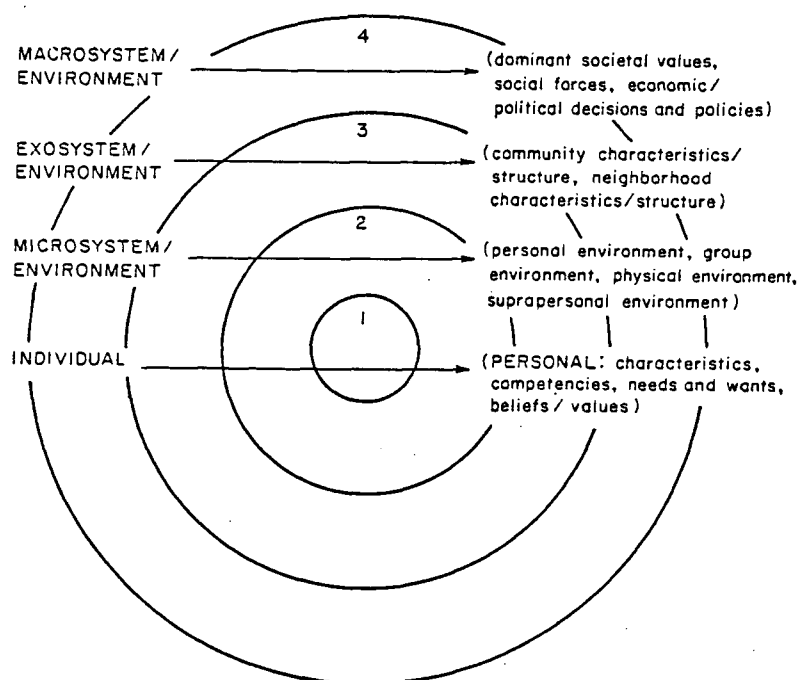


Figure 5. Ecological Housing Model (From Eckert and Murrey 1984, 99)

In E-A study, housing is typically discussed in terms of the immediate environment of an individual (individual, microsystem, exosystem), with little or no attention given to variables within higher

levels of the environment or macrosystem. However, Eckert and Murrey (1984) state that it is precisely the wider context which "order(s) the very existence and range of housing alternatives from which older people must choose" (Ibid., 99).

Several larger societal forces which affect the development of new housing options for older persons include:

A. Gentrification or upgrading of housing stock through renovation or rebuilding;

B. Lack of secure tenure due to withdrawal of rent control legislation;

C. Lack of affordable rental units due to inability of private market to build profitable low-cost rental units, low numbers of government-built or government-assisted social housing units, high interest rates;

D. Erosion of income through inflation;

E. Cutbacks in housing programmes and supportive services through the provincial Long Term Care system. (Ibid., 121-123)

These points highlight areas public policy is persistently unable to address in order to meet the housing needs of the disadvantaged. Plausible reasons for the endurance and pervasiveness of the housing problems of low and moderate income older persons will be revealed in a discussion of macro-level aspects of housing. First, however, the Canadian context is presented in a review of the demographic trends and the housing characteristics of older Canadians. The inaccuracy of defining housing needs and preferences as those which are currently evident also provides reasoning for expanding the background of the thesis to include a discussion and analysis of the broader social, political, and economic context of housing.



## CHAPTER THREE

## THE CANADIAN CONTEXT

3.1 Demographic Shifts

One of the most important challenges facing Canada and other developed and developing nations is the worldwide phenomenon of population aging. In Canada, as elsewhere, demographic projections indicate major changes in the age structure and distribution of the population (see Figure 6).

There are four main trends which will affect housing needs and demand in the city of Vancouver.

1. The proportion of the population over the age of 65 will grow more quickly than any other age group (see Figure 7), increasing from 9.5% (1981) of Canadian population to an estimated 13.1% by 2011 (Ellingham, MacLennan and Dick 1984, 12), and to between 14-17% by 2021 (Canada 1983, 16). Other researchers forecast 13.6% by 2001 (Gutman et al. 1986, 2), or 14.7% older persons by 2006 (Priest 1985, 3). Such variations are due to differing predictions about fertility, life expectancy and immigration rates.

2. The growth in the numbers of older persons will also continue. (see Table I). The current Canadian total of over 2.4 million is anticipated to reach 3.4 million by 2001, and nearly 4 million by 2011 (Ellingham, MacLennan and Dick 1984, 12).

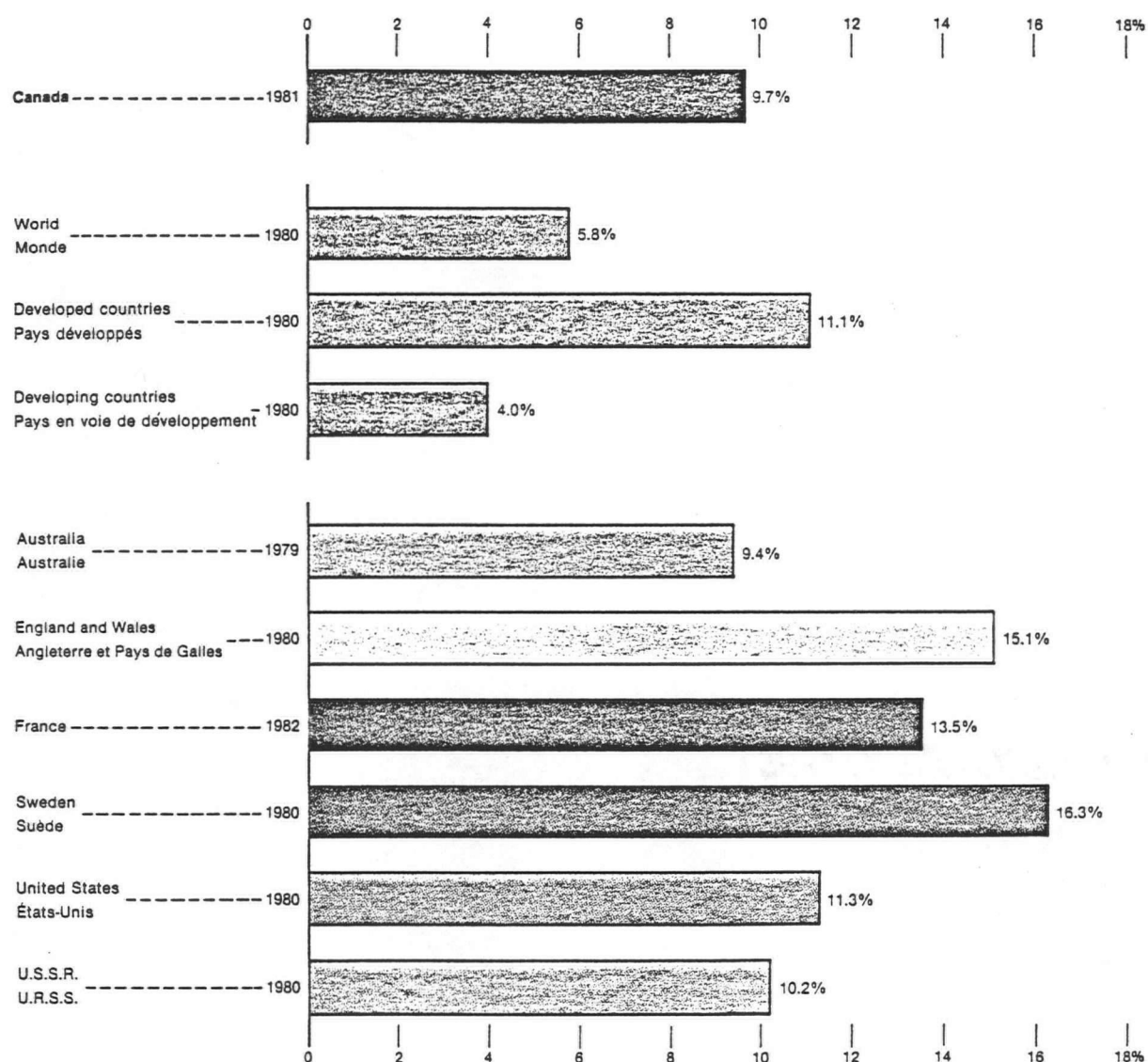
3. There will be a heavy distribution of older persons in urban areas (see Figure 8). In 1981, 78% of those over 65 lived in urban centres (1000 or more population), and 40% of these live in centres of 500,000 or more population (Brink 1985, 2).

4. It is expected that the relatively high proportion of older

Figure 6

Percentages of Total Population Aged 65 and Over, Canada,  
and Selected Regions and Countries

Pourcentages de la population totale âgée de 65 ans et plus, Canada  
et certains pays et régions



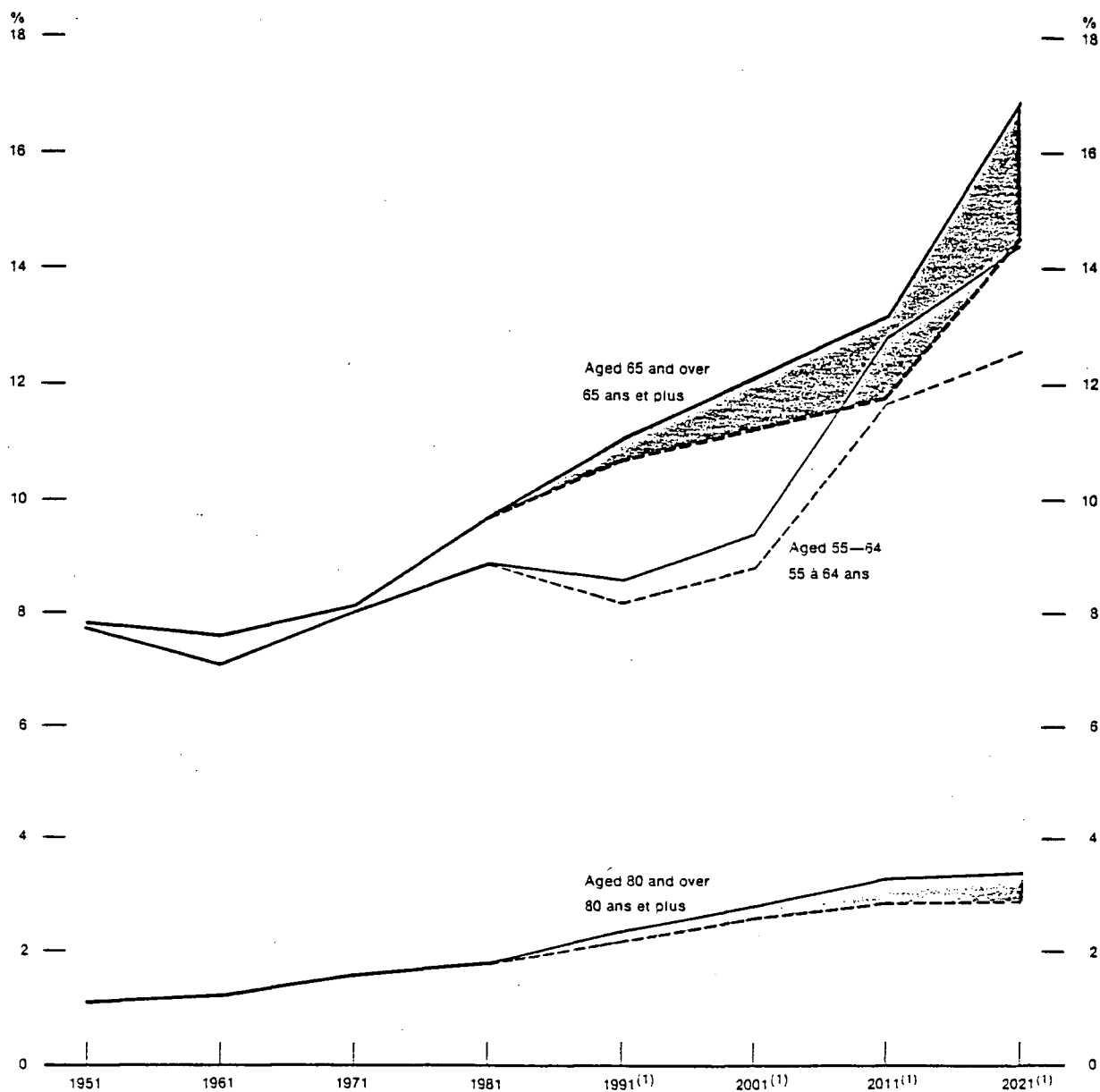
Source: Statistics Canada, 1981 Census; United Nations, Demographic Yearbook 1981;  
and United States, Bureau of the Census, 1980 Census

(from Canada, Department of Health and Welfare 1983, 13)

Figure 7

Percentages of Total Population in Selected Age Groups, Canada, 1951 to 2021

Pourcentages de la population totale de certains groupes d'âge, Canada, 1951 à 2021



(1) Projections. Shaded areas represent ranges of possible percentages

(1) Projections. Les parties ombrées représentent les intervalles de variation des pourcentages possibles

Source: Statistics Canada, Censuses of Canada and Projections from Demography Division

Source: Statistique Canada, Recensements du Canada et projections de la Division de la démographie

(from Canada, Department of Health and Welfare 1983, 17)

Table I

Population in Selected Age Groups, Canada, 1950 to 1980  
and Projections 1985 to 2025

(Population in thousands)

Year	Age Group			
	All Ages	60 and Over	65 and Over	80 and Over
Estimates				
1950	13,712	1,552	1,051	149
1955	15,698	1,737	1,215	174
1960	17,870	1,928	1,358	214
1965	19,644	2,150	1,507	272
1970	21,297	2,448	1,696	327
1975	22,697	2,829	1,938	375
1980	23,936	3,217	2,282	436
Projection 1				
1985	25,971	3,654	2,551	498
1990	27,751	4,051	2,931	595
1995	29,353	4,352	3,225	709
2000	30,723	4,583	3,432	790
2005	32,001	4,974	3,581	904
2010	33,306	5,634	3,887	968
2015	34,618	6,385	4,443	994
2020	35,829	7,253	5,074	1,016
2025	36,823	8,027	5,786	1,137
Projection 4				
1985	25,196	3,622	2,529	496
1990	26,346	3,999	2,894	590
1995	27,259	4,278	3,171	700
2000	27,938	4,482	3,361	777
2005	28,470	4,838	3,489	886
2010	28,920	5,445	3,767	945
2015	29,270	6,115	4,279	967
2020	29,463	6,888	4,844	982
2025	29,462	7,570	5,479	1,094

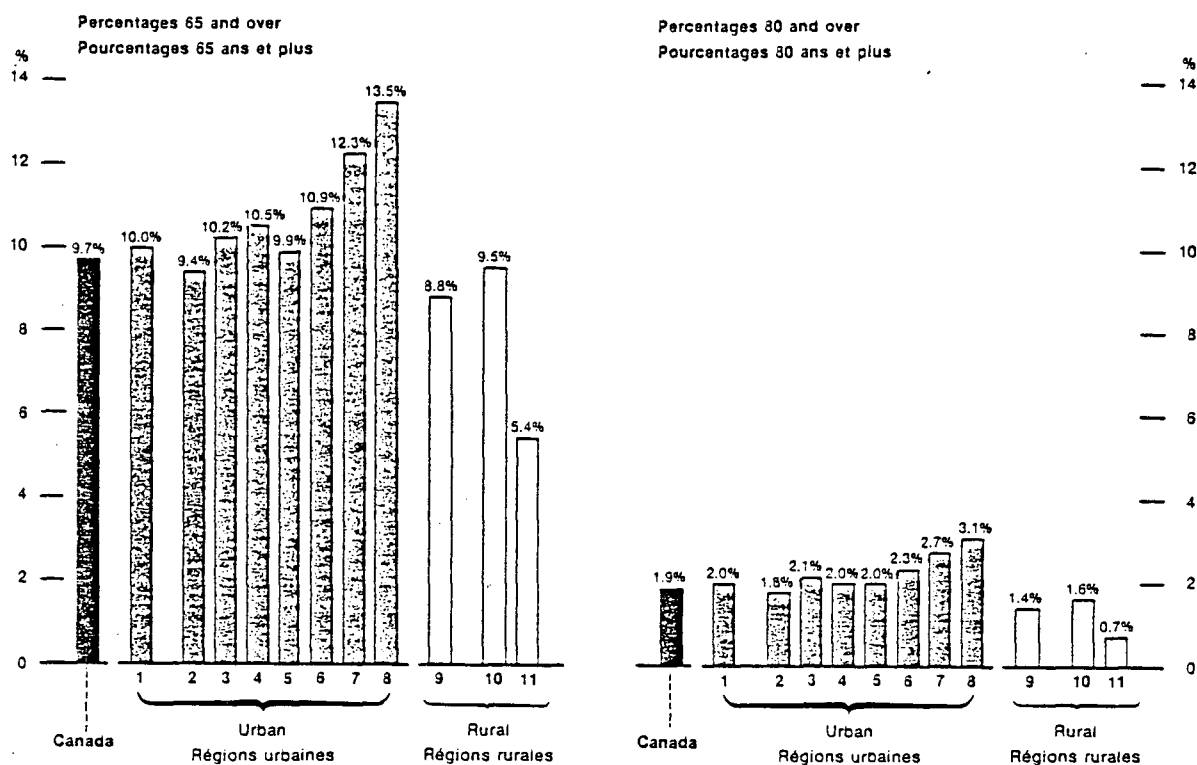
Source: Statistics Canada, 1973, Catalogue 91-512; 1979, Catalogue 91-518, Table 5; 1979, Catalogue 91-520, projections 1 and 4; and 1980 estimates from the Demography Division.

(from Canada, Public Affairs Directorate 1982, 4)

Figure 8

Numbers and Percentages of Total Population Aged 65 and Over and Aged 80 and Over, for Selected Urban and Rural Areas, Canada, 1981

Nombres et pourcentages de la population totale âgée de 65 ans et plus et de 80 ans et plus, pour certaines régions urbaines et rurales, Canada, 1981



Areas — Régions	Total population Population totale	Numbers 65 and over Nombres 65 ans et plus	Numbers 80 and over Nombres 80 ans et plus
Canada .....	24,343,000	2,361,000	451,000
Urban size groups Urbaines par groupes de taille			
1 Total .....	18,436,000	1,843,000	365,000
2 500,000+ .....	10,035,000	939,000	178,000
3 100,000 — 499,999 .....	2,558,000	261,000	53,000
4 30,000 — 99,999 .....	1,997,000	210,000	40,000
5 10,000 — 29,999 .....	1,561,000	155,000	31,000
6 5,000 — 9,999 .....	794,000	87,000	19,000
7 2,500 — 4,999 .....	799,000	98,000	22,000
8 1,000 — 2,499 .....	692,000	94,000	22,000
Rural non-farm, farm Rurales non agricoles, agricoles			
9 Total .....	5,907,000	518,000	85,000
10 Non-farm — Non agricoles .....	4,867,000	462,000	78,000
11 Farm — Agricoles .....	1,040,000	56,000	7,000

(from Canada, Department of Health and Welfare 1983, 27)

Canadians living in the province of British Columbia will be a continuing trend. In 1981, over 12% of older Canadians lived in B.C. (see Table II). This figure is expected to rise to a minimum of 17% by 2021, with absolute numbers of older persons reaching over 1 million (Shulman 1981, 30). In 1981, of all Canadian metropolitan centres, the City of Victoria had the highest proportion of older persons - over 15%, and the City of Vancouver ranked second with 10.5% (Gutman et al. 1986, 26). Currently, Vancouver has 15.2% older persons, while 25.8% of Victoria is over age 65 (Ibid., 28). However, the proportion of population over age 65 in smaller communities within the Greater Vancouver Regional District has continued to exceed major city and provincial averages. In 1986 White Rock was 34.9% older persons and New Westminster was 18.1% older persons (see Table III). It is anticipated that large numbers of retired persons from other parts of Canada will continue to migrate to B.C., increasing their proportions in the major urban areas of this province. (Ibid., 2)

The above trends indicate that meeting the housing and social needs of a growing population of older persons will be a significant public policy issue that will affect all areas of Canadian life in the decades ahead.

### 3.2 Housing Characteristics

Within British Columbia in 1981, a total of over 115,000 households, or more than 11.5% of all households were headed by a person aged 65-74 (Ellingham, MacLennan and Dick 1984, 18). Well over 64,000 other household heads were over the age of 75 (Ibid.). Thus over 18% of all households in British Columbia in 1981 were older

Table II

Total Population and Population Aged 65+:  
Canada and Provinces, 1981

	Total Population	Population 65+	% of Population Aged 65+ in Canada	% of Provincial Population Aged 65+
Nfld.	567,681	43,780	1.9	7.7
P.E.I.	122,506	14,890	.6	12.2
N.S.	847,442	92,560	3.9	10.9
N.B.	696,403	70,550	3.0	10.1
Quebec	6,438,403	569,370	24.1	8.8
Ontario	8,625,107	868,195	36.8	10.1
Manitoba	1,026,241	121,830	5.2	11.9
Saskatchewan	968,313	116,170	4.9	12.0
Alberta	2,237,724	163,385	6.9	7.3
B.C.	2,744,467	298,175	12.6	10.9
Canada	24,343,181	2,360,985	100.0	9.7

Source: Statistics Canada. 1981 Census. Population, Age, Sex and Marital Status, Catalogue 92-901, Table 1, September, 1982.

(from Gutman et al. 1986, 21)

Table III

Total Population and Population Aged 65+: Greater Vancouver Regional District, 1981

Communities/ Electoral Areas*	Total Popu- lation	Population Aged 65+			Distribu- tion of Pop. 65+ in GVRD	Percent- age of Population 65+
		Total	Males	Females		
Belcarra	425	25	15	10	<0.1	5.9
Burnaby	136,500	16,555	6,750	9,805	12.1	12.1
Coquitlam	61,085	4,330	1,855	2,475	3.2	7.1
Delta	74,775	4,500	1,980	2,520	3.3	6.0
Lions Bay	1,075	35	20	15	<0.1	3.3
New Westminster	38,555	6,960	2,630	4,330	5.1	18.1
North Vancouver City	34,270	4,315	1,615	2,700	3.1	12.6
North Vancouver District	66,635	4,605	1,890	2,715	3.4	6.9
Port Coquitlam	27,530	1,385	625	760	1.0	5.0
Port Moody	14,920	595	255	340	0.4	4.0
Richmond	96,155	7,110	3,080	4,030	5.2	7.4
Surrey	147,325	12,205	5,695	6,510	8.9	8.3
Vancouver	415,555	63,305	25,950	37,355	46.2	15.2
West Vancouver	35,730	5,570	2,140	3,430	4.1	15.6
White Rock	13,550	4,725	1,900	2,825	3.5	34.9
Electoral Areas:	5,755	880	345	535	0.6	15.3
Total	1,169,840	137,105	56,745	80,355	100.0	11.7

\*See Appendix 1 for a listing of census divisions and subdivisions included in each GVRD community and electoral area.

Source: Statistics Canada. 1981 Census. Population, Occupied Private Dwellings, Private Households, Census Families in Private Households - British Columbia, Catalogue 93-922 (Vol. 2 - Provincial Series), Table 2, December, 1982.

(from Gutman et al. 1986, 27)



(Gutman et al. 1986, 45).

A 1979 City of Vancouver Planning Department report on housing estimated that in 1976 there were nearly 60,000 persons over age 65 in the city, composing approximately 22% of the households, and concentrated in the West End (12%) (Planning Department, City of Vancouver 1979, 21). Estimated population over the age of 65 for 1986 was approximately 65,200 and was expected to increase to 112,580 by 2001 (Ibid.). However, in 1981, 11.5% or 146,000 residents were over age 65 in the Vancouver metropolitan area (Boniface and Wilson 1986, 1).

Currently, 85% of older Canadians live in accommodation provided by the private market (Ellingham, MacLennan and Dick 1984, 12). Two-thirds of these own their own homes, with the proportion of ownership dropping with increasing age (Brink 1985, 3). The major type of dwelling consumed by older persons is the single family home, accommodating approximately 60% of older Canadians; multiple unit projects under 5 storeys in height housing 26%; high-rise apartments housing 12%; mobile homes accomodating 2% (Statistics Canada 1984, 4). In 1981 in British Columbia, 56.2% of older households lived in single detached homes; 22.3% in apartment buildings less than five storeys; 10.9% in apartments more than five storeys (Gutman et al. 1986, 48).

### 3.3 Inaccurate Assessment of Housing Needs and Preferences

Although the proportion of older persons is currently growing, there is little evidence in present seniors' housing of an understanding of the varying characteristics, desires and needs of this segment of society. Inaccurate assessment of needs and preferences on several levels contributes to this situation.

### A. Misread Needs

Until recently, the physical and environmental needs of older Canadians have been largely ignored by academics and practitioners. Aging research has emphasized the medical, psychological and sociological aspects of aging to the neglect of basic issues such as housing. The dearth of information on the nature of housing specifically designed and available for older persons has not yet improved significantly, in spite of the growing concern for meeting the housing requirements of increasing numbers of older persons. Stone and Fletcher (1980) for example, in their overview of the issues confronting Canada's older citizens, pointed out that:

Current and historical statistics on the availability, use and volume of need for such housing facilities by older persons are largely non-existent. The situation is virtually that of an information wasteland. (99)

Use of deficient and incomplete census data to extrapolate housing needs leads to a multitude of assumptions (Mendritzki 1983). For example, a Vancouver City Planning Department report on needs for affordable housing cited figures which are "indicators of the probable dimensions of needs rather than absolute numbers" (1979, 1). Thus inaccurate assessment, knowledge and understanding of needs results (Stone and Fletcher 1980).

As has been widely noted in the gerontological literature, the fact that older persons reflect diverse characteristics is not recognized in either public policy and programmes or in wider society. The tendency to assume that older persons comprise a homogeneous group with uniform preferences and needs translates into a limited range of housing alternatives made available to older people. (Cluff 1981; Pastalan 1981) This becomes very apparent when the type and range of housing

choices of older persons in other Western countries (Goldenberg 1981; Hoglund 1985) are compared with the range of options available in Canada (see Appendices A, B).

The H.I.N.T.S. report (Housing in North Toronto for Seniors 1981) was initiated due to a lack of basic information about the housing of older persons in North Toronto. Housing expertise and knowledge exists mainly in the area of large-scale housing built by government or non-profit organizations for low income older persons (senior citizen apartments, lodges, nursing homes). This is because of the accessibility of information regarding such projects, and of the residents as research subjects (Pastalan 1981). A limited amount is known about how older persons can remain independent in the community with appropriate housing design and adequate support services (Meyers 1981; Age Concern 1984).

The numbers of older persons facing housing decisions in the future in Canada will reach over 1 million in the next 30 years (Ellingham, MacLennan, and Dick 1984, 12). Many of the current and future retirees do and will continue to live in their pre-retirement housing, or they will relocate to non-senior market accommodation. (Mendritzki 1983) While existing housing will meet much of this demand, new construction is also necessary. However, a sufficient quantity of housing units for older households will not necessarily meet needs (expressed or unexpressed). As noted by Cates (1986) the stress by government agencies on quantitative aspects of housing (number of units, size) defers recognition of qualitative components which satisfy housing needs. While recent statistical information (Gutman et al. 1986; Canada Health and Welfare 1983) will greatly assist in development of general understanding of housing needs of older Canadians, need from the

subjective viewpoint must also be included.

#### B. Needs and Preferences Not Reflected in Current Choices

To view the currently available housing choices (see Appendix B) as those which are preferred or which meet the housing needs of older persons is erroneous in several ways.

1. The majority of older persons over age 65 would prefer to live in single-detached homes which they own (Mendritzki 1983; Government of Canada 1986; H.I.N.T.S. 1984). This is indicative of the societal ideal, a continuation of previous tenureship, and reflects a preference to remain independent and self-sufficient. For many older persons, this preference to remain in their homes plus the limited available alternative housing choices means that they remain in unsuitable housing which is too large, too expensive to maintain or repair (O'Byrant 1983; Pastalan 1983; Novak 1985). If, at a time of health or financial crisis older persons must move, it is often to undesirable accommodation that neither suits their needs nor their preferences.

2. While there may be a range of housing options providing choices in a wide geographical area, there is a lack of housing choice for older persons in their local communities (Whiting and Woodward, 1985; Mendritzki, 1983). This is a problem commonly expressed in the Vancouver area seniors' community, and verified by studies in Alberta (Whiting and Woodward 1985; Mendritzki 1983). Such studies have identified several housing preferences including ownership, personal safety and building security, convenient and familiar location, moderate operating and maintenance costs, and smaller, well-designed homes with special features that facilitate independent living (Whiting, 1986). Similarly,

Brink (1985) names five related housing "needs": affordable shelter, locational requirements, support services, health care services and special designs. These vary in importance to older persons according to their age, sex, health status and available financial resources. Therefore, a wide variety of housing choices in every community is required to meet such a range of needs and personal characteristics.

3. If the demand for available housing is taken as indicative of need and preference, a misleading view of the housing situation for older Canadians results. Many older persons are not actively pursuing better housing, making do with their present accommodation. This latent demand added to the definition of "need" as defined by "market demand" leads to an inaccurate assessment of the housing needs of older Canadians (Rose 1981).

4. Assessing need using the waiting lists of low rental units is also erroneous. Bonniface and Wilson (1985) suggest that only 30-50% of those on waiting lists are in need of housing due to the duplication of names on various lists, failure to delete names once housing has been found, and inaccurate record keeping. Further, such lists do not name all those needing housing (Rose 1981).

This chapter has briefly outlined the demographic trends which indicate significant increases in need and demand for seniors' or retirement housing. The current pattern of housing for older Canadians is expected to continue, particularly if new housing options are not developed. Current living arrangements and waiting lists are misleading as indicators of housing demand and need. Reliance on these exacerbates the problems of planning and developing adequate, suitable and preferable accommodation for current and future older generations.

## CHAPTER FOUR

### THE MACRO-CONTEXT - SOCIAL, POLITICAL AND ECONOMIC ASPECTS

Housing for older persons cannot be understood separately from the general context in which it is based. How housing is developed, the types produced, the numbers of units, including their location, design and availability is determined by social, political and economic structure and conditions. Understanding of this wider context also illuminates the values and attitudes toward aging which underlie the housing situation of older Canadians, suggesting probable causes of unmet needs and gaps in the range of seniors' or retirement housing choices.

#### 4.1 Social Bias

While ageism, prejudice and stereotyping of older persons are declining, these negative attitudes are still important in how older persons are viewed by society and how they view themselves. (Kuhn 1976; Canada 1985; Action Age 1983; Levin and Levin 1980)

Much of what Comfort (1976) wrote ten years ago still holds true: older persons comprise an "underprivileged minority" "made arbitrarily roleless" (Comfort 1976, 17) through "ejection from a citizenship traditionally based on work" (Ibid., 16). Older persons suffer from the loss of former roles and the imposition of a demeaning idleness and non-use in terms of the roles and values which give the lives of younger people meaning. (Williamson, Shindul and Evans 1985) Old age is seen as a "problem" (Phillipson 1982, 166) and older persons are "societal problems" (Bergum 1981, 228). Thus the later years are "characterised by labeling, segregation, and ever-increasing constraints on individual

options, autonomy and power" (Williamson, Evans and Powell 1982, 230).

Comfort terms old age the "second non-civic childhood" in which persons become dependent, detached and in need of assistance from others who know more or know best (Ibid., 243). Also, older persons are often described as a non-productive burden upon the economy (Phillipson 1982, 166). Terms such as "the elderly", "the aged" and "senior citizen" connote a large, faceless group of similar persons with similar declining abilities, needs and preferences. Decisions regarding both the larger and finer issues and details are made by professionals and bureaucracies who "give" them support services or develop, supply, or manage housing. (Carp 1976; Gelwicks 1977; Canada 1983a) This type of dependent relationship means that: "(Those) who supply shelter are also the ones who decide how much shelter there should be, where it should be, and how it should function in the lives of essentially passive users" (Fichter, Turner and Grenell 1972, 246). Grenell was speaking of India in the early seventies when he wrote:

"People become invisible in the housing process to the extent that officialdom either does not see them at all or sees them only in terms of quantities of stereotyped human beings."  
(1972, 96)

Currently this statement could be made regarding older North Americans and other minority groups as they seek adequate housing.

Social housing built in the 1960's and 70's for such "statutory non-persons" (Comfort 1976, 31), also reflects this social bias: very little of the same type of housing is all that is required or economically feasible. Thus, high rises containing hundreds of bachelor suites for older singles, and a few one-bedroom suites for couples were built in Canadian cities. A Canadian architect in 1980 exclaimed that there is a disproportionate number of these, when in 1973 the Canadian

Council on Social Development strongly recommended one-bedroom suites (Murray 1980, 167). In 1968, the Province of Ontario stopped building bachelor suites, yet it was not until 1985 that the British Columbia government followed suit. "The difference is simply a matter of size - about 37 square feet" (Ibid.). However, within the social context, the additional costs can be seen to be decisive. While bachelor suites will no longer be built, these and their inherent social and psychological problems have become part of the legacy of seniors' housing in Canada. The relationship of such psycho-social issues to the environment concerns much of the work of environment and aging researchers.

The recession of the 1980's has also meant economy in other areas of social housing. For those living in B.C. social housing, the amount of income paid on rent (Rent Geared to Income-R.G.I.) has increased from 25% to 30%. Also, assisting only those "truly in need" will likely mean that since more moderate income persons do not meet the more stringent criteria for social housing residency, large numbers of poor older persons will live together in segregation, becoming the norm for government-assisted seniors' housing.

The general societal value of old age and the status of older persons is also reflected in the location of seniors' housing complexes. Both social housing or the private market have built accommodation for older persons on cheap, available land (Gutman 1980) rather than in locations which have the quality of life and independence a priority also reflects the general societal value of old age and the status of older persons.

Older persons who are in income groups above the limits set for social housing qualification also find inadequate units, designs, and



locations. There are few alternatives beyond regular market housing for older persons who desire to move from their long-time homes, but who do not yet need the care provided in sheltered or Long Term Care Housing. Also, very few of the available options meet housing needs or preferences in the areas where older persons wish to age. Thus many seniors are unwilling to leave their present accomodation.

Another facet of this inclination towards "aging in place" is the strong attachment many older persons feel toward their homes. (O'Byrant 1982; Canada, N.A.C.A. 1986) According to Lawton, this desire has a significant relationship with "the totality of personal causal initiative represented by the home" (1983, 17). The "home" embodies many years of choices, decision-making, displaying preferences and control. Hence the reluctance to leave "the fruits of such instrumentality" (Ibid.) is enhanced.

Homeownership is also not an indicator of housing adequacy, affordability and suitability. In the City of Vancouver, more than half of those over age 65 own their own homes. However, many of these are overhoused: as "empty-nesters" they consume family-type housing as singles or couples. Also, housing costs (maintenance, repairs, taxes) may be so high that older homeowners face affordability problems and safety hazards (Canada, Public Affairs 1982). Similarly, aging in place in the suburbs may mean distance from both basic and specialized services which are required when capabilities begin to decline.

Developers have recently begun to look upon the older homeowner as a new housing market. Housing specifically designed and marketed to "over 50's" is available throughout the suburbs of the Vancouver area. Thus while social housing as it exists currently supports Comfort's

opinion that older persons "are seen as old first, and provisionally as a person second" (1976, 31), those older persons with assets are seen mainly as a potential market. (Mendritzki 1983; Williamson, Shindul and Evans 1985) Resultant social and market housing may meet their needs and preferences. However, it is likely that choice increases and one's needs are more closely met the wealthier one is. (Fichter, Turner and Grenell 1972)

Viewing the context of housing of older persons within society's macro-structure reveals the likely premise for the social bias toward older persons. Housing policy and programmes are developed under a political-economic system that is primarily concerned with insuring that the various aspects of capitalism and its supportive systems continue. (Myles 1981; Williamson, Shindul and Evans 1985) Also, the above account of ageist attitudes, policies and outcomes emerge from an underlying political and economic premise of older persons as a controlled social group (Williamson, Evans and Powell 1982).

#### 4.2 Political-Economic Context of Housing

While Canadian senior citizen and general housing policy and programmes have been shaped by constitutionally-based federal-provincial relationships, housing policy has for the most part been used as an economic stabilization tool within a Keynesian framework. This is evident in the fluctuation of federal housing programmes as listed in Appendix C (see also Hulchanski 1984, 9). During periods of economic growth for example, housing programmes expanded in number and in funding. The 1982 Canadian Home Ownership Stimulation Program (CHOSP) illustrates an attempt to inflate the economy during a slump period

through a subsidy to encourage house construction and employment. The Assisted Rental Program (ARP), Multiple Unit Residential Building Program (MURB), and Canada Rental Supply Plan (CRSP) sought to increase the rental housing stock. The results, however, were highly subsidized and costly (ultimate costs are yet unknown) private market housing that is unaffordable to those most in need of housing, and which would have been built without the subsidies (Ibid., 53). Thus, as Olsen (1982) states, housing need is in part not met due to the premises, effects and demands of the free market system. In essence, the free market mechanism provides the analysis and the response context to which housing and other issues are subjected.

Housing policy has also been part of fiscal and monetary policy. This can be seen in the evolution of federal housing programmes (see Appendix C). The stated housing policy goals of the British Columbia Ministry of Lands, Parks and Housing in 1984 are further evidence of this point:

- a) maintain a stable investment climate for encouraging the housing industry to develop housing;
- b) assist those with special needs for housing who cannot meet them in the market;
- c) encourage deregulation of the housing industry and reduce public service levels;
- d) support more effective use of existing housing;
- e) encourage federal government housing policies which support long-term private sector investments in housing (1984, 29).

Social housing policy as reflected in the development of social housing programmes (see Appendix C) is a function of the wider context.

Social housing programmes are only weakly related to the availability or the affordability of housing for low-income older persons, and are more related to maintenance of the bureaucratic system than meeting housing needs. (Grenell 1972) The analysis of the situation of housing for low-income British Columbians by the B.C. Housing Coalition is documentation of this. Numerous submissions to the recent provincial government Commission of Inquiry on Social Housing (May 31, 1986) similarly described the state of housing in B.C. (British Columbia, Ministry of Lands, Parks and Housing 1986).

Social housing is provided only for those who meet criteria of "core-need" (Canada Mortgage and Housing Corporation-C.M.H.C.), "greatest in need" or "most in need" (British Columbia Housing Management Corporation-B.C.H.M.C.). However, as noted earlier, the entry level to any of these types of "need" (R.G.I.) is becoming increasingly higher. Recent recapitulation of B.C. social housing policy, and revamping of programmes and eligibility during a period of growing need, also indicates the receptivity of social policy to the demands and constraints of the market system.

Constraints of both supply and demand-side housing programmes inhibit wide use by eligible persons: lengthy and involved processes in obtaining assistance; lack of information regarding the programmes; inaccessible offices where information and assistance is available. Provincial income assistance programmes for older persons such as Shelter Aid for Elderly Renters (S.A.F.E.R.) and Guaranteed Available Income for Need (G.A.I.N.) are good examples. Also, meagre funding and complex formulas of such assistance are in sharp contrast to the generous allowances of federal income tax and interest payment

deductions for homeowners and for investors.

Subsidies, the primary form of social housing assistance for older persons from federal and provincial governments, enhance the profitability of construction, maintenance, and rehabilitation, while in general they do little to get at fundamental housing problems.

(Hulchanski 1984) The federal government Residential Rehabilitation Assistance Program - R.R.A.P. Which provides funds for upgrading homes or making them disable-accessible is one exception. However, the funding for subsidized housing as well as for successful programmes such as R.R.A.P. Aid only a portion of needy households (Rose 1981).

High profits of land and high interest rates have affected the numbers of seniors' housing units built. Also limits set by general economic prosperity to available funds for all social housing has resulted in various low-income or special needs groups making gains at the expense of others. This is the current situation in B.C., and one of the reasons behind the formation in 1985 of the B.C. Housing Coalition.

Another possible reason housing demand is not met is that landlords, mortgage lenders and other members of the private housing industry do not desire fully-met housing needs and demands. Housing for dependent groups in the population can be economically stimulating. The well-being of the construction and building supply industries rely on an economy in which the number and consumption of dependent poor is maintained (Fichter, Turner and Grenell 1972, 244). Also controlling the number of units available for rent or ownership serves their interests (Ibid., 121; Olson 1982, 175).

Quality of housing and quality of environment (site, designs and construction) are another area subject to the mandates of the

marketplace. Many seniors' housing complexes in both urban and rural areas are located on cheap available land (Gutman 1980) rather than in locations that have the quality of life and independence of the older person as a priorities.

Increased privatization of social housing, (which appears to be the direction of the current B.C. government), has not resulted in improvements in housing quality in the U.S.A.. It has simply increased costs of the units built with public monies via the introduction of new costs in the form of further profits (Olson 1982, 178).

Turner's (1972) analysis of American housing in the early seventies has significance here. It lends support to this political-economic analysis of housing from another perspective. According to Turner, suitable and adequate housing will only result if housing ceases to be seen only "as a noun", or as a material and physical product that has "value" assigned by the economic production system, and subjected to fluctuations in that context. Turner also notes that the results of non-participation of users in "production" of the product housing:

"... supralocal agencies which plan for and provide for people's housing needs, with the result that the people so planned for and provided for turn into consumers or passive beneficiaries" (1972, 154). Also, Turner believes that housing policy and programmes which are devolved from centralized decision-making has limited possibilities for meeting real needs. Part of the housing problems of older persons are due also to the gap between real housing needs and needs as perceived by professionals, in addition to the mismatch between both types of needs and the available social and private-market housing. A similar interpretation of the housing situation of older persons in B.C. underlies the thesis

argument for defining housing needs according to the perceptions of older persons. This can best be done through the participation of older people in planning seniors' housing.

Thus housing programmes have been used as economic stabilization tools and employment creation tools, rather than as planned initiatives to meet the housing needs of Canadians. As was written of the U.S.A., "the real housing game is between the commercial and political powers that dominate instead of serve the people for whom they ostensibly exist" (Turner 1972, 172).

#### 4.3 Structural Analysis

The structural causes of unmet needs of older persons are explored in the work of Williamson, Evans and Powell (1982), Olson (1982) and Levin and Levin (1982). Such "structural analyses" examine the relationship of older persons with wider economic and ideological forces and reveal the ageism which underlies current housing realities.

According to Olson (1982), economic, political and social perspectives which are known as "conservative" and "liberal" (1982) accept the underlying premises and relationships of the current system under capitalism. Those gerontologists, planners and others who work within the conservative frame of reference seek to assist older persons in preparation for, adjustment to, and acceptance of what old age brings. (Marshall and Tindale 1978; Williamson, Evans and Powell 1982; Levin and Levin 1980) Under the liberal perspective, older persons are seen to have rights to their fair share of societal resources and are victims of the modern industrial system which forced them into dependency by rendering their skills obsolete, demanding retirement, and

lessening family ties. The current problems of old age, including inadequate or unaffordable housing, are a result of imperfections in the market system. (Hulchanski 1984) As Phillipson notes "it has usually been assumed that the types of problems associated with old age can easily be resolved within the framework of a capitalist society" (1982, 2).

Another aspect is the vested interest gerontologists and other professionals have in the deprived social group "the elderly". "Amelioration of the elderly's difficulties is possible, it would seem, as long as their dependency as a group is not seriously dissipated" (Williamson, Evans and Powell 1982, 241). Levin and Levin (1980) and Olson (1982) also note the tendency of existing service systems for older persons to benefit mainly the service providers, while providing limited support to those older persons being served.

Under a more "radical" or "structural" perspective, the values and ideals of individualism and the free market system permeate the study of aging, and current social attitudes toward old age and aging. These values are likewise inherent in housing development, policy and programmes. That older persons are disproportionately represented in low-income or poverty groups has resulted from the general bias of our political economic system toward the free market system, and the institution of retirement. (Olson 1982; Phillipson 1982; Williamson, Evans and Powell 1982)

Olson (1982) argues that housing inadequacies amongst older persons are due mainly to income and minority status, rather than to age itself. Insufficient incomes lead to poverty as a direct result of the unequal distribution of power and income. Midwinter (1985) concurs and argues



that the institutionalization of retirement has resulted in political and economic alienation of older persons. He states that older persons are not resourced and thus are excluded. Succinctly put by de Beauvoir (1977, 604): "Society cares about the individual only in so far as he is profitable".

In Phillipson's (1982) discussion of the relationship of retirement to economic and social institutions, class and gender are important factors in determining life-chances. They epitomize the numerous forms of inequality within capitalism such that "growing old is constructed through a range of policies imposed upon the older population" (1976, 167). Williamson, Evans and Powell also see retirement as a "subtle form of segregation and social control" (1982, 228) which regulates the labour market.

De Beauvoir's (1977) analysis of the state of aging and older persons refers to the impact of capitalism which brought the social, economic and political changes that no longer allowed integration of older persons into the community through the combination of their productive work and their homelife. Retirement was the "consequence of a deliberate social choice" (de Beauvoir 1977, 261), that "means losing one's place in society, one's dignity and almost ones reality" (Ibid., 299).

Olson and Phillipson may not agree with the use of the term "radical" by Marshall and Tindale (1978) because they do not explicitly advocate widesweeping change to the political-economic system. However, in the view of Marshall and Tindale (1978), changes to the theoretical perspective of old age and aging is paramount. In advancing an argument for "a radical gerontology," they state that gerontology, based on

viewing the individual's adaptation to society, rather than the context and interaction of older persons within the system, "seldom considers the necessity for serious change in that system itself" (Marshall and Tindale 1978, 165). In the work of Williamson, Evans and Powell this sentiment is stated more strongly: "Deviants should change, not existing economic and social arrangements" (1982, 242).

A cursory review of gerontological journals reveals the dominance of studies on biological and psychological changes in old age (life satisfaction, morale, attitudes, values). This emphasis "deflects attention away from structural properties affecting the lives of the aging" (Ibid., 166), or the role played by the economic and political environment (Phillipson 1982; Levin and Levin 1980). Thus, paraphrasing the sociologist C. W. Mills, public issues are reduced to private troubles (Marshall and Tindale 1978, 166). The system remains intact and the individual is expected to make adjustments in an attempt to accept its consequences. Levin and Levin summarize the current prevalent social attitude:

That we do not attack the roots of the problem involves the tendency to believe in the particular variety of order and stability that forms our existing social structures and institutions. (1980, 60)

The broader philosophical perspective taken by Bergum (1985) integrates the above structural analysis, and provides another level of influencing factors beyond the macro-level forces examined above. Bergum's thesis is that the type of housing built for older persons (its form and meaning) is derived from and reflects how "man", old age and death are conceived. One of the conceptual "models of man" defined by Bergum, the Post-Historic humanism of the early twentieth century in the Western world, has particular significance for current seniors' housing

realities.

The dominant philosophy of this historical period, as viewed by Bergum, conceived of "man" as finite, a product of time and chance, with "truth" evolving and not absolute. Old age was undesirable, and death was hidden from view. Older persons were considered social problems. The poor were subsidized by the state through income and shelter programmes. The resultant housing forms were hygienic and medically organized, reflecting the dominance of medicine and science. Housing was also aesthetically plastic and abstract (using new materials), mass produced (similar units - equality), and were impersonal, efficient and without ornamentation or personal furniture (no historical reference). Many of these elements are very visible in current seniors' housing. Vestiges of this conceptualization are also still evident in attitudes and in how the design and construction of retirement housing is approached. Bergum suggests that because conceptual models correlate with certain housing forms, any present or future seniors' housing will be based on currently-held models. This is because the meaning of old age and aging are continuously evolving through the interaction of older persons with others at various levels, and with the social institutions of which they are participants or non-participants. While Bergum's view may not be widely held, the understanding that follows from the focus of his discussion on the broader context is of significance to the thesis argument.

A paucity of appropriate housing alternatives, inadequate or unaffordable housing, or poorly designed and managed housing, all result from how old age is viewed, and the status of older persons within the society and its systems. An understanding of both the micro-level of the

older individual's adaptation and the larger macro-level forces which produce the environment of aging are necessary for an adequate social gerontology (Myles 1981, 19) and likewise for this inquiry. While there must be an awareness that multi-level forces for the most part shape the housing options and choices available to older persons, consultation with older persons at the more micro-levels of the environments can begin to widen their housing alternatives. A continuation of the existing system, level of understanding and knowledge will not meet the increasing housing needs as our population ages, and may result in severe housing and service crises. If analysts and writers such as Bergum (1981) and Olson (1982) are correct in their conceptions and understanding, the current worldview toward old age in North American society must change. When the relationships of older persons with society on social, political and economic levels have been altered, housing forms, services and the systems which create or provide them will change.

## CHAPTER FIVE

### PARTICIPATION

#### 5.1 Development of Participation

Rising out of the 1960's trend toward increased public participation in community affairs, participation in housing planning and design was an offshoot of community and urban planning. It has had two main components in its development: a reform movement and mechanism for social change, and a design methodology.

As a reform movement, participation began over twenty years ago with the rejection of traditional planning and architectural practices. A favorable political and economic climate supported advocacy for the rights of poor inner city residents and the development of citizen participation.

During the political unrest of the sixties, what came to be known as advocacy planning and participatory planning, grew out of criticism of the "knowledge" of professionals and their competence in solving urban problems using technical models. (Comerio 1984) Application of scientific methods with neutral, objective criteria to a wide array of existing and emerging social problems was not seen as possible; value judgements were necessary. Thus the physical bias of planning and its models and processes came under fire. Pluralism in the form of different groups interacting to produce alternative plans for an area's development surfaced as an attempt to externalize and democratise decision-making. While advocacy became "the expression of an enlightened professional conscience, ... participation became the methodology essential to the democratic process" (Comerio 1984, 232).

Including more people in the various decision-making levels, or making environments more responsive to users have been the main concerns of the movement termed "community design". Both advocacy planning and participatory planning are sub-movements within community design. The essence of this movement is two aspects of empowerment: political and enablement (Ibid, 238). Firstly, all citizens have the right to a voice in decisions which affect their basic lives. Professionals likewise have a responsibility to create environments which are useable, understandable and which allow for full participation by all citizens. Community design is "client-, process- and value-specific, yet remarkably nonspecific in terms of the tasks it will take on" (Comerio 1984, 238).

While the planners who were community designers were concerned with the politics of planning processes (advocacy planners), architects sought a more democratic design process (Harms 1972). Research and knowledge from person-environment studies and the analysis of human behavior assisted this search. Other community designers, including participatory planners focused on more subjective concepts and methods of design participation. Concurrently, ethical questions were asked by other community designers: who should participate, who chooses the process and when does the process become manipulative or exclusive (Comerio 1984, 234).

However, as Comerio recounts, simply providing the poor with technical assistance and power did not lead to justice and power. Participatory planning also did not make the design and planning process more understandable nor did it give more control to users. The role and knowledge of professionals were not demystified. Instead, a new

expertise was created: special-interest politics. The goals of empowerment and democratic consensus also did not evolve. "A messier process of cooperation and negotiation in an adversarial setting has resulted" (Comerio 1984, 239-240). The evaluation of public meetings and hearings by The Institute for Participatory Planning (1978) supports this conclusion.

These failures in addition to the more conservative political climate of the seventies were important in forcing early idealism based on social justice and empowerment to become pragmatic and thus product orientated. As a result, community design has become concerned with activism and development of local social services within a larger goal of creating self-reliant communities (Ibid.).

Comerio is correct in summarizing the essential importance of the surfacing of contradictions in the development of the participation movement. Participation as a process has yet to evolve to the point where it achieves more than marginal success. Middle-class groups tend to represent community interests, and thus development of political and economic power within the community has been limited. However, the volume of plans and environments resulting from community design practices has been large. Also, and perhaps more importantly, "building people" resulted (Comerio 1984, 240). Though difficult to measure and quantify, development of leadership capacity, self-esteem, skills in participation and problem-solving have been significant results of participation. The values of justice, empowerment and motivation also remain as guiding principles for community-based planners and architects. This thesis attempts to integrate both the successes and lessons of advocacy and participatory planning and contribute to the

evolution of community-based participation and development.

## 5.2 Types of Participation

The previous outline of the principles and development of community design provides background for a review of the various types of participation related to housing found in the literature. Participants in the planning and design process include : experts, users or consumers, and project financiers (the paying client). Most often the actual users do not participate. If users or consumers are involved, they generally are represented by persons appointed by the experts or financiers.

Becker (1977, 11) in discussing environmental participation, distinguishes between users and consumers. User input differs from consumer input in the point at which the participation takes place, the type of input it is, and its consequences. The value of user input is "process" while consumer participation results in information or "product". Because consumer input occurs before specific users are identified, general information about values and preferences amongst groups of individuals can be obtained for planning purposes. This is not to lessen the importance of the more specific user participation in design, construction and throughout the lifecycle of housing. Becker (1977) views user and consumer participation as complementary and necessary.

Wandersman (1979), Arnstein (1969), and Van Dyk (1978) outline and evaluate several types of participation. The types of user participation based on level of input are defined by Wandersman (1979, 191) as:

- a) full user control and full decision-making powers;



- b) choosing among alternative plans or designs;
- c) reactive, feedback, advice or consultative role;
- d) non-participatory role.

Arnstein's (1969) ladder of citizen participation (see Figure 9) has eight types of participation within three general levels, ranging from "non-participation" through three degrees of "tokenism," to three types of "citizen power".

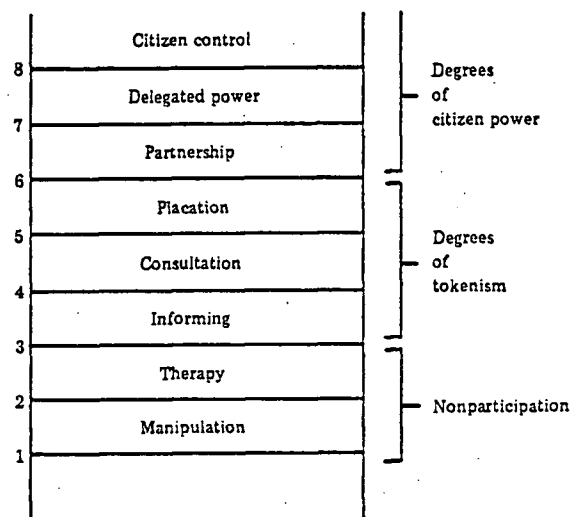


Figure 9. Citizen Participation Ladder (From Cohn 1976, 79)

In contrast to the typologies of Wandersman and Arnstein, Van Dyk (1978) uses a model of participation in his discussion of cooperative housing which is based on two forms: creative or reactive, with various levels of input from professionals and others such as the users. According to Axworthy (1973), true participation only occurs when final decision-making powers lie in the hands of the people rather than with professionals and administrators. Van Dyk disagrees and outlines four main forms of participation within a quadrant model based on variations between reactive and creative participation, and on who makes the

decisions:

Quadrant 1 is typical of most participatory planning. It is reactive with final decisions made by professionals, generally resulting in dissatisfaction and confrontation, such as is common in public meetings called by zoning variance boards.

Quadrant 2 is also reactive but allows participants final decision-making powers, while professionals have a major role in what is proposed for discussion.

Quadrant 3 has minimal professional input with development of ideas and proposals and decision-making by participants, with professionals verifying or implementing the decisions, often resulting in dissatisfied professionals.

Quadrant 4 allows participants to develop proposals under the guidance of professionals in formulating final solutions.

Van Dyk's (1978) discussion of participation in developing cooperatives centres on two of these: Quadrant 2 (allowing "reactive participatory democracy") and Quadrant 4 (allowing "creative professional administration"). These approximate Arnstein's sixth and seventh levels of "citizen power": "partnership" and "delegated power". As distinct from "consultation" and "involvement", participation in the decision-making process or direct influence on the behavior of decision-makers is necessary for true participation. Agreeing with Van Dyk, the thesis research sought a viable method that would be derived from and lend support to this definition of participation.

### 5.3 Effects of Participation

Participation is a complex phenomenon discussed by Wandersman (1979a, b) in terms of "value" and "technique". The "value" or rewards of participation was shown by Wandersman's (1979a) research studies. "Value" is also the prevalent outcome of the housing cooperative development process and lifestyle. Van Dyk suggests that because of the creation of a broader sense of responsibility and greater satisfaction through participation, "the process is as important as the product" (1978, 14).

The validity of participation as a technique in providing better environments than those planned without participation is difficult to support empirically. The positive effects of participation have a commonly accepted rather than scientific basis. Wandersman states that participation can affect:

- 1) satisfaction with the environment;
- 2) attitudes about the planning process;
- 3) attitudes towards experts;
- 4) feelings about oneself and one's role in the process;
- 5) changed behavior such as more use of the affected environment. (1979, 475)

Van Dyk (1978, 11) categorizes the variety of broad and specific advantages and benefits of participation as:

- a) the gap in values between professionals and lay-persons closes;
- b) needs of a specific group of users rather than the fictitious "average person" are better met;
- c) there is more satisfaction with the resulting plan or design,

and a more open, trusting relationship with and attitude toward professionals;

d) personal growth and development results from gaining control over an important aspect of life, enhancing feelings of self-worth, competence and personal fulfillment;

e) democracy is strengthened through understanding of social structures and processes, and also through the check of autocratic professionalism.

There are also increased feelings of responsibility and control over the environment, and less alienation.

Several studies have found positive effects of participation, but as Wandersman notes, "the different effects noted above are likely to be interdependent rather than independent" (1979b, 476) and linked non-linearly. Who evaluates the effects of user participation influences whose goals and needs are met. Another issue rarely researched is the longer-term growth or dissipation of the effects of participation.

Despite the proven advantages and positive outcomes of various levels of participation, older persons generally have not been involved in decision-making or planning processes. A review of planning practices in the next section reveals a paucity of examples, and the lack of recognition by planners and other professionals of the legitimacy of the role of older persons in the process of planning housing.

#### 5.4 Planning Practices

Opportunities for the involvement of older persons in the housing development process as users or consumers has been limited. This is summarized by the phrase "housing (done) for" rather than "housing

developed with" older persons. This is visually and boldly expressed by the omission of the consumer, older persons, in the triad of actors involved in creating housing (see below) which was the underlying conception of a mid-seventies conference on theory development in environment and aging.

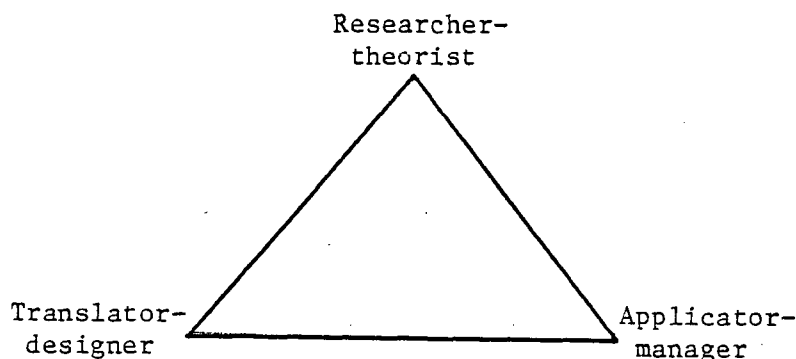


Figure 10. Model of Actors in The Housing Process

(From Windley, Byerts and Ernst 1974, 287)

Such thinking and approach definitely reflects an "outsiders view of the inside" of environments and housing (Windley, Byerts and Ernst 1974, 287). Similarly, a recent volume summarizing the present state of the environment and aging field was dedicated "to the enhancement and creation of appropriate and high-quality environments for older persons" (Lawton, Altman and Wohlwill 1984). However, there was no mention of any contribution which older persons might make toward this goal.

As is true for representation of the interests of older persons in general (Williamson, Evans and Powell 1982), planning of housing and other environments used by older persons is still largely confined to professionals, financiers and administrators. This regime of 'experts' presumably know more about older persons' housing needs and preferences than older persons themselves (Ibid., 243). Cooperative housing does

however, provide a continuing but limited example of member participation which includes older persons, in pre- and post-occupancy planning.

Past and current planning practices in British Columbia and other areas of North America have rarely included the subjective point of view of older persons in the planning of housing. Exceptions can be seen in:

- a) periodic surveys of tenants of social housing or cooperatives by government or other agencies (Saskatchewan Housing Corporation, 1984);
- b) needs assessment surveys by non-profit groups as stipulated in grant applications (B.C. Ministry of Lands, Parks and Housing);
- c) community meetings and public hearings as part of citizen participation in local issues, delegations to city and municipal Councils, and referendums (Vancouver City Planning Commission 1986);
- d) advisory councils which provide input into planning of housing policy, programmes and by-laws (Cohn 1979);
- e) questionnaires used by developers and others to determine what aspects of housing (locational, amenities, design features) are most important to older persons (Whiting and Woodward 1985);
- f) post-occupancy studies carried out as part of architectural services, independent or academic researchers (Carp 1976; Gutman 1978, 1980).

However, surveys and questionnaires used by governments or researchers for information gathering are problematic for they may not tap true feelings (Butler and Oldman 1980). Surveys and their findings

may also be inaccurate due to the general methodological limitations of such methods. For example, respondents may not find appropriate answers amongst the available choices on closed format questionnaires, and may choose approximate answers that misdirect the findings. However, the lack of opportunity for reaction from respondents is the greatest limitation of surveys and questionnaires. They are unidirectional methods of little participatory value as defined for the purposes of the thesis. These techniques "provide the citizen with no stimulation or opportunity to develop a consciousness about his place in society and a strategy to express his values in community action" (Audain 1972, 80).

Local government events and programmes such as those noted above which are set up to expand citizen participation in planning and decision-making by government, primarily serve administrative purposes. The Citizen Participation Handbook (1977) states that many of these techniques have not worked well. It can be argued that in spite of input, the process whereby the problems of older persons are felt, heard and acted upon by government are not altered. (Williamson, Evans and Powell 1982, 241) This may be caused, as Rosener (1981) suggests, by the government's view that participation is "an end in itself". Also, officials define and maintain control over the participation process and thus its outcomes. Therefore participation in Canada has been seen "as an opportunity for the public to inform and consult, but not to advise and consent" (Burton 1979, 18). For example, without decision-making power, older persons on advisory councils are not able to effect change or their aspirations. They remain at the lower rungs of the citizen participation ladder as described by Arnstein (1969), or at Wandersman's (1979) or Van Dyk's (1978) reactive level of input.

Other reactive methods, public meetings and hearings, are the most common participatory techniques. They usually seek to "generate information" (Burton 1979, 17). Because there is only a small role for consultation or input from citizens, such public events have tended to function as demonstrations of polar opinions on issues. The public turnout simply measures the amount that people care about the issue rather than accomplishing other participatory goals.

Public hearings have also had far too numerous expectations to succeed as participatory techniques. People are intimidated by the physical set-up: officials are up on a stage, microphones are in conspicuous places, the pace is hurried, and pressure results. Thus confrontation and conflict usually result. (Institute for Participatory Planning)

Similarly, lobby groups have varying success in promoting support for policies and programmes favourable to the seniors' community (Canada 1985a), and in intervening to reverse political decisions such as the de-indexing of government pensions. The lack of effectiveness Davidoff wrote of in the sixties appears to be still with us:

The difficulty with current citizen participation programmes is that citizens are more often reacting to agency programs than proposing their concepts of appropriate goals and future action ... Such participation should be the norm in an enlightened society. (1965, 334)

Thus there are several issues and difficulties of citizen participation which need to be overcome for the potential of participation to be reached. Francis (1978, 377) outlines a "critical framework" consisting of questions which identify and test approaches by various levels of non-professionals and professionals in participation. The elements of the six questions consists of:



A) Genesis of Approach - How the process is initiated and by whom can determine the success of the planning and design process. A workshop that is imposed on participants by a professional in an attempt to prepare a plan quickly or obtain fast approval will be far less successful than a process that allows both the professionals and the citizens to develop jointly a plan or design.

B) Participation and Roles - The role of the professional versus non-professional citizens differ as do their power and status in the decision-making. Also, while professionals receive compensation, citizens "volunteer" their time and energy.

C) The Participatory Process and Techniques used also determine the success of the participatory exercise.

D) Human development is one of the main results of participatory processes. Increased awareness and understanding of professional perspectives lessens lay-citizen intimidation, while new skills are developed as well.

E) Environmental change may or may not be appropriate. Post-occupancy evaluation or assessing the match between the ideas of participants with the resultant design or plan is as rare as evaluation of the level of a participatory approach.

F) Social and Political Implications - The degree to which social or political change is a result of a participatory process is another key question. While increased environmental awareness is a likely outcome of participatory design, eliciting individual and social change, and on-going involvement of participants in urban design or development projects after professionals withdraw, are greater challenges for professionals.

These elements in Francis's critical framework were used in developing the approach and objectives of the thesis case studies. They will also be found in the analysis of the findings and outcomes of the participatory events.

To summarize this chapter thus far, the techniques of participation and their possible outcomes have provided the background for development of the thesis research. Beginning with a review of the origins and development of participation as a reform movement and design methodology, this discussion has noted the general lack of involvement of older persons in planning and decision-making, and the reactive form which participation usually takes. Likewise, the potential advantages and positive outcomes of participation in housing will be illustrated in the next section through the presentation of several participatory planning examples involving older persons in housing planning and design processes.

### 5.5 Examples of Participation

While user participation has been an essential component in the development of cooperative housing, there are scattered examples of the participation of older persons in planning and housing issues. The following are included as clear illustrations of housing-related initiatives at national and local levels which include the perspective of older persons at varying degrees. Using Van Dyk's model of four quadrants (see Figure 11 below) which was explained earlier (Section 5.1), each of these will be assessed a level of participation as noted in the brackets ending each example.

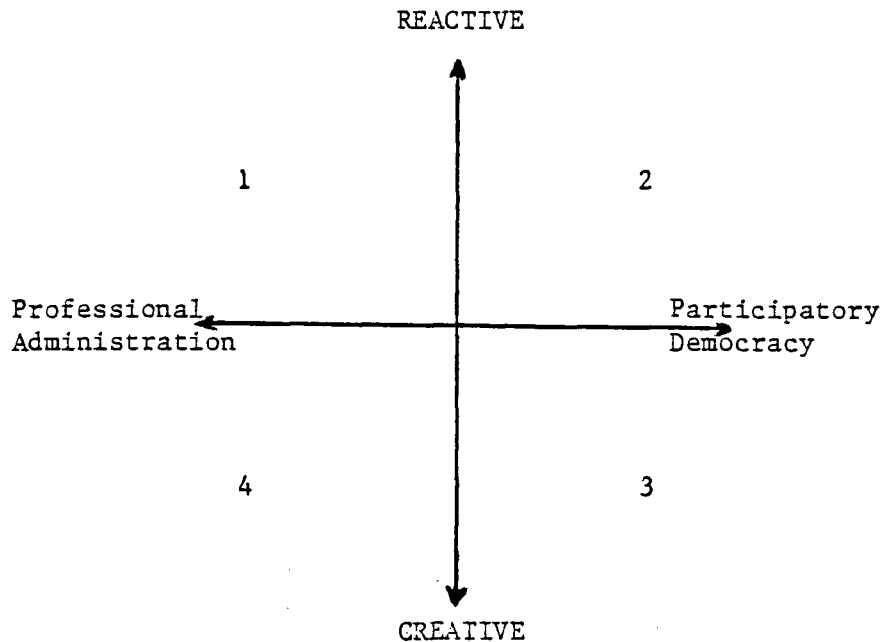


Figure 11. Quadrant Model for Participation (From Van Dyk 1978, 7)

Some of the following illustrations clearly fit one Quadrant; others lie in the range of participation between two Quadrants.

1) Examples of government consultation with older persons about programmes in other countries include participation by older Dutch persons in decisions about housing programme allocations. They are also represented on housing advisory bodies, and are integrated into decision-making committees regarding housing services and facilities (Oriel 1982). In Norway, old people's associations negotiate with the government regarding funding for housing, and the types of programmes and services. Efforts to enlarge community roles for older persons in West Germany include policy formation with older persons rather than for them. (Quadrant 4)

2) As an example of Wanderman's (1979) second level of

participation, (choosing among alternative plans), a mid-seventies San Francisco redevelopment project (Hartman, Horovitz and Herman 1976) was based on participation of tenants (single, low-income older persons) in a user needs survey. This survey consisted of small group discussions centered on slides of various alternative design issues and features, which illicited views, comments and choices of potential users. The study resulted in a set of guidelines for the designer of four redevelopment sites. The technique and process used in this study also emphasizes the importance of going to the environment of the potential participants and fitting into their lifestyles when seeking consultation or other types of participation. (Quadrant 1)

3) The Canadian federal government through Canada Mortgage and Housing Corporation (C.M.H.C.) sponsored tenant participation in two Manitoba public housing projects in 1974 and 1975 as a response to the public participation trend (C.M.H.C., 1979). The purpose was to improve housing environments and to provide social benefits. These included social cohesion amongst participants, education about the housing development process, pride and responsibility. Design benefits included a better environment and more sensitive design fitting the needs of participants and others with similar needs. High quality information also resulted which corrected misconceptions about public housing, and provided guidelines generated from user priorities for the allocation of limited housing dollars for maximum benefit. Consumer participation in seniors' housing can potentially yield similar results. (Quadrant 1 - 2)

4) Apartment blocks built by the Greater Winnipeg Senior Citizens Non-Profit Housing Corporation in the early 1970's received design input and review by a group of seniors. Although there was only token

involvement by older persons, their contribution increased the suitability of the amenities (Gold 1985). (Quadrant 1)

5) Also in Winnipeg, in the late seventies, the Astra Non-Profit Corporation built high quality housing for moderate income seniors. (Gold 1985) The planning, larger design concepts, size, style, amenities and location received input from older persons who became residents of the resultant housing. (Quadrant 1)

6) In Toronto, Ontario, the Beech Hall Cooperative was initiated by senior tenants when the municipal government decided to tear down their apartment building (Goldblatt 1981). The residents organized to protest, then were linked with a resource group who assisted them in formation of a C.M.H.C.-funded seniors housing cooperative. (Quadrant 1-2)

7) The Stanley Knowles Cooperative was initiated by the Canadian Council of Retirees in the late 70's to provide modest income seniors in Toronto with a housing alternative. (Pinsky 1983) Prospective cooperative members had input into the larger and finer design elements of the high-rise project through a twelve member design committee. The role of the nine older persons was generally advisory, but decisions were reached by consensus in consultation with the two professional staff members. The additional costs for this user participation exercise was an estimated 100-200 architectural hours and 50-100 consultant hours for a total cost of \$5000.00 to \$10,000.00. Compared with the capital cost, this was a relatively small increase in total costs. (Quadrant 4)

8) The CBC television programme "The Best Years" in November 1986 reported on a senior-developed retirement community located in central Red Deer Alberta. The project of small homes was initiated, designed and

funded by members of a non-profit housing society with minimal assistance from professional and the provincial and local governments. (Quadrant 4)

9) Other Canadian examples of the contribution of older persons in general housing design issues include research and publications. Building Better, is a book by older persons which describes design features compatible with their housing needs (Crawford 1980, 123). (Quadrant 4)

The National Advisory Council on Aging (N.A.C.A.) has acted upon its principles in recognizing that older persons want a voice in housing decisions through its recent activities on a multi-disciplinary task force with C.M.H.C. and the Canadian Housing Design Council. The task force exposed and debunked generalizations about seniors' housing needs, building upon the N.A.C.A. acknowledgement that older people prefer to live autonomously in the community and most preferably in their own homes. The result, a book entitled Housing an Aging Population: Development and Design Guidelines (forthcoming) is a planning and design resource. Using a detailed checklist of design features, it informs older persons and others how to identify their housing needs, adapt or renovate existing accommodation, or design appropriate new housing that will accommodate to changing abilities. (Quadrant 3 - 4)

The comprehensive H.I.N.T.S. Report (Housing in North Toronto for Seniors, 1981) was undertaken by an organization whose membership is largely older persons. It illustrates the possible outcomes of collaborative projects. The report focused on the housing of local older persons, and the interviews were conducted by senior volunteers. (Quadrant 3)

10) The renovation in 1984 of a seven-unit historical Vancouver row-house by an architect-consultant and six others, including one older person, illustrates creative, full user control in decision-making. While the interior of each 1800 square foot 3 bedroom unit was designed with each owner, retention of the original character resulted in a Heritage Award. Not only has this private development resulted in high quality housing and high user satisfaction, but total costs (\$30 per sq.ft.) were considerably lower than those of government funded housing (\$50 per sq.ft.) or other developments (\$40 sq.ft.). Thus there is unrealized potential for private developments which include older users in planning and design to meet their financial criteria as well as their housing needs and preferences. (Quadrant 2)

11) The general public, analysts, academics, government officials and housing professionals are beginning to learn more about housing from the perspective of older persons in the Vancouver area. The City's Special Council Committee on Seniors has appointed senior spokespersons who study and report to City Council on many issues involving older persons. (Quadrant 1)

The Liaison Committee of the Gerontology Association of British Columbia uses the principles of the World Assembly on Aging in promoting the viewpoint of older persons. This focus on the perspective of older persons was a central component of the live-televised February 1986 Housing Forum (Case Study One), the follow-up televised November 1986 Retirement Housing workshop (Case Study Two), and at the November 1986 New Westminster Seniors' Housing Symposium. (Quadrant 2 -3)

The type of participation by older persons who were involved in the above examples varied throughout the range and scope of Van Dyk's (1978)

model. All quadrants were illustrated including: consultative or reactive input with professionals determining the ideas, process and decisions (Quadrant 1); some control over what is proposed, the process and decision-making with professionals (Quadrant 2); greater control and input into ideas, proposals and decisions than professionals (Quadrant 3); full participation with professionals in all aspects of the process and decision-making (Quadrant 4). The events which are the thesis case studies were noted under example ten as illustrations of the range of participation between Quadrants 2 and 4. As discussed earlier, these quadrants allow participants to be involved to a lesser (reactive participatory democracy) and greater degree (creative professional administration). Van Dyk (1978) states that these two quadrants provide a satisfactory mix of participation and decision-making for cooperative housing development.

As indicated by the above examples, there are many possible forms of consumer or user participation useful in developing housing for older persons. However, few examples including those above, exist where older persons have sole control over all aspects of a housing process. Most processes include only professionals, with little reactive consultation from users or consumers. Therefore, awareness, understanding and acceptance of collaborative planning by professionals is a necessary first step before the potential of consumer participation can be realized.



### 5.6 Rationale for Participation

Many researchers have noted the lack of participation by older persons in issues that affect them (Crawford 1981; Canada Health and Welfare 1983; Canada N.A.C.A. 1985a, b), and in housing concerns (Carp 1976; Lawton 1980; Crawford 1981; Schiff 1981). In preparation for the 1982 World Congress on aging, a Canada-wide discussion amongst older persons and their spokespersons generated the Canadian Non-governmental Organizational Report on Aging. The report included a recommendation specific to housing: "Whenever possible, the aging should be involved in housing policies and programmes for the elderly population" (Canada Health and Welfare 1983b, 86).

Also, at the 1983 Second Canadian Conference on Aging, the wide involvement of older persons in decision-making was a major assertion in the presentations and workshops. Proposals to promote this resolution included:

That governments, as appropriate, and the private housing industry should engage in a planning exercise that goes beyond the provision of basic shelter and undertakes to identify the different elements that are required to help elderly people maintain a maximum level of independence. (Canada, Health and Welfare 1983c, 5)

Participation by older persons in housing issues was likewise endorsed by the 1984 Saskatchewan Task Force on Senior Citizen Housing. Specifically, it recommends that "seniors become more actively involved in the planning and management of accomodation for senior citizens, as they are most aware of the needs of the elderly" (Saskatchewan Task Force 1984, 21). It further proposed consultation and decision-making roles for older persons through the appointment "of at least one senior citizen to each Local Housing Authority", and representation on the Board of Directors of the Saskatchewan Housing Corporation (Ibid.).

The H.I.N.T.S. organization has stated as a priority the greater involvement of seniors in identifying issues and ensuring the appropriateness of action taken (Housing in North Toronto for Seniors 1981). Another priority is identification of specific needs of older persons by advocacy groups.

Blackey and Wood reiterate views found in the Conference on Aging Report when they state that instead of housing policies and programmes that "meet needs as we think they should be met, what we should be trying to meet are the needs of the elderly as they perceive them" (1980, 103). "The most direct way to assess needs and priorities is to ask questions directly of the persons to be served" (Morgan 1979, 55). A similar conclusion was expressed by an architect: "We need to know the ultimate client - the older persons and the sponsoring or funding authority, hopefully in that order" (Murray 1980, 171). However, the involvement of older persons in the participation process must be a "partnership" if the status (actual or perceived) of older persons is to change (Canada N.A.C.A. 1982, 4).

How far has participation as social reform and technique advanced? The words written by Harms in 1972 unfortunately have relevance today, particularly in regards to the seniors' community:

The community-professional relationship is typically paternalistic, with the community in the intermediary position, a position of "love it or leave it," whatever the "service" is, and the professional in the superior position, able to withdraw at his whim. (1972, 192)

The more recent arguments noted above for inclusion of older persons in housing policy and programmes and decision-making, echo the sentiments, concepts and arguments made by advocates in the citizen participation and community design movement twenty years ago. As

previously stated, the lack of effectiveness in citizen participation appears to be due in part to the reactive nature of participatory techniques. It is also likely that planners and others have not done all that was possible to make input by older persons as effective as possible in the techniques used. Professionals appear to not have accepted the legitimacy of older persons in consultative nor higher levels of participation as outlined by Van Dyk. However, the essence of this problem is likely the constraints derived from the realities of our political-economic system. Nevertheless, as evidenced by the diverse examples of participation presented earlier, there are ways in which participation of older persons in housing issues can be enhanced. Addressing the role of the professional in participatory processes is useful to this endeavor.

### 5.7 Re-professionalization

While collaborative planning may appear to pose a threat to the role of planners and other professionals, it essentially calls for more flexible use of their professional skills in graphics, communication, and in their ability to create or generate alternatives. Collaboration necessitates an expanded and more creative role for professionals whose skills facilitate the comprehension, interest and learning of participants so that there is more understanding and greater participant competence. As Harms (1972) stated: "the new work relationships require the development of a new self-conception on the part of the professional" (192).

In the usual policy and housing development processes, the values of the expert can play a decisive role. The philosophy or the purpose of

the plan or design held by planners, designers and paying clients most often determines what is of significance in determining the goals of an environment: monetary, esthetic, individual expression, user self-concept, user behavior.

Including older persons in the planning process asks the professionals to be more accountable and responsible, without projecting their own interests and values onto the "users". Schiff states "projection is not sufficient, since our expectations...may be quite different" (1981, 172). The Citizen Participation Handbook (Institute for Participatory Planning 1978) suggests that professional responsibility consists in part of knowledge of the perspective of those ultimately affected by a project so that both planning and design respond to their values. One of the fifty basic citizen participation principles listed in the handbook states that it is not possible for professionals to know another's values without knowing, interacting with, and learning directly from that individual or group of individuals (1977, III-8). Another of the principles restates the commonsense observation that professionals do not have a monopoly on good ideas for problem-solving: "These planners then refuse to recognize the tremendous potential value of ideas that are suggested to them by lay people...free for the taking if they took the trouble to look for these ideas and to pick them up." (Ibid., III-9). Grenell (1972) and Sadler (1979) also note the underestimation by professionals of the great resource (skills, talents) of citizens.

Interaction between professionals and lay persons enhances the possibility of reaching consensus on key issues, and value-based solutions that meet the needs of those involved and others similar to

the participants. With better communication between "producers" and "consumers", there is greater likelihood of better environments resulting. Thus consumer or user participation legitimizes the planner's role to one beyond that of advocacy planning. Participation allows the values, standards and judgments of consumers or users to be integrated into the planning process.

Francis (1978) argues for the "de-professionalization" of participatory processes to make them more open and inclusive of the skills and ideas of both lay and professional persons. However, Midwinter (1985) cautions against the development of a new variation of professionalism. In Midwinter's "re-professionalization" of professionals (1985, 28), they are "the servant" of the consumer, entering into dialogue with them, and leading them "actively and constructively into the fraternal world of popular democracy" (Ibid.). This new professional would perform the role of "convenor or steward of the activities of elderly people, rather than the purveyor of services to them" (Ibid., 31). That planning involving older persons must be ongoing and continuous is summarized by: "What is appropriate for those who are seniors today may not be appropriate for seniors 20 years from now. Seniors themselves will be different and so will the social context in which they live" (Schiff 1981, 173).

Thus through efforts to effect greater democratic planning, collaborative planning with older persons in housing development can be a venue for the evolution of social change. Increasing the legitimate status and roles of older persons are thereby encouraged. This aim alone can be argued as valid, given the discussion and conclusions concerning the social bias and other constraints of the political-economic context.

### 5.8 Research Premises for Case Studies

In that the methodology of the thesis centres on the users or consumers, it is concerned with "community design". Like "community design", it recognizes the inadequacy of professional technical knowledge and processes in resolving societal problems. Also, professionalism, due to its domination by rationality from technical and scientific theory, cannot deal with the complexities and uncertainties of the political, economic and social context.

Thus the thesis research is based on ideas such as those argued by Rittel and Webber (1974): a process of direct involvement and dialogue among all concerned. This view holds that there is no ultimate expertise and there is infinite knowledge.

Rittel's "symmetry of ignorance" argues that knowledge varies in extent and content amongst individuals, but "we are equals in what we do not know" (Ouye and Protzen 1975 as quoted by Comerio 1984, 231). Professionalism loses its dominance because all involved have knowledge that has equal value in the planning process. The result is a more democratic planning process with justice, fairness, and articulation of the interests of all involved. These goals are components of "creative-professional administration" - Quadrant 2, and "reactive-participatory democracy" - Quadrant 4 in Van Dyk's (1978) model of participation (see Figure 11 discussed earlier).

By bringing together on an equal footing professionals and older persons, the thesis case studies attempt to bridge the gap between two types of knowledge and roles in housing: producer and consumer. They also attempt to show for both groups involved in the process the value

of voicing opinions, listening and learning. The thesis hopes to initiate change in who the participants are in decision making about senior's housing, and their power relations. It is also based in the belief that all citizens have a right to not only to be represented in decision-making, but also to participate in decision-making.

A further assumption is that new housing environments will benefit from consumer representation in planning exercises such as the case studies. Housing is an issue which is not specific to a single local seniors' community. Also, if retirement housing is to become a more suitable or satisfactory product whose components are decided upon by non-users in a distant detached context and process, users or consumers such as older persons must be included in as many aspects as possible of the housing planning and development process.

The thesis recognizes the problems of early advocacy planning in identifying needs and representative sub-groups. Both Comerio (1984) and Peattie (1968) asked how adequately the participating sub-groups represented the wider diverse group. Not all users will desire to be participants. Secondly, the type or level of participation will vary as will the effects of participation. Wandersman (1979a) found that whether or not the design or plan was important to the users, the fact that they had opinions or knowledge about it influenced participation. He listed several variables on which individuals differed: personality , environmental preferences, demographic variables, effectiveness factors and person-situation variables (1979b, 473-373). It is expected that participants in the case study events will similarly vary in their response to the planning process.

Non-participation is a common feature of the lifestyle of many

people, including older persons (Sadler 1979, 10). There are also disparities in skills and resources needed for participation. While it is not realistic nor possible to draw all older persons into the planning process, it was hoped that these two case studies would "build a broader base of representation over time for those previously unrepresented" (Peattie 1968, 83).

The diversity in the interests, needs and preferences of older persons is the same as that noted by Peattie (1968) in discussing Herbert Gans's urban villagers. However, while heterogeneity may cause serious problems for an advocacy approach which attempts to reconcile differences amongst diverse individuals, the thesis uses diversity as a given and as a departure point in advocating the need for much greater involvement in housing planning and development by diverse consumers. Because of their heterogeneity, older persons need a wider range of options from which to choose appropriate housing. Thus the case studies attempt to go beyond advocacy planning. They become radical in the sense articulated by Midwinter (1985) and Marshall and Tindale (1978), yet remain repetitive of the goals and objectives of the community designers of the sixties and seventies.



## PART II: THE CASE STUDIES

This section of the thesis describes and assesses two events which are examples of collaborative planning of housing for older persons: Retirement Housing Forum, and Retirement Housing Alternatives Workshop. Evaluation by objectives and discussion of findings precede the outcomes of each event (Chapter Seven) and the overall analysis (Chapter Eight).

Both case studies, the Retirement Housing Forum and its follow-up, the Retirement Housing Alternatives interactive television programme, were conceptualized and coordinated by the thesis author with the assistance of the Liaison Committee of the Gerontology Association of British Columbia (G.A.B.C.), and the financial support of G.A.B.C..

## CHAPTER SIX

### THE CASE STUDY EVENTS

#### 6.1 Rationale

The issue areas explored in Part I of the thesis have identified the need for collaborative planning of housing for older persons. Against this background the method chosen to explore this theme was prescribed by the thesis research question and objectives.

The main thesis objective is to explore and evaluate a method of participation which:

- a) obtains knowledge about housing realities, needs and preferences from the perspective of older persons;
- b) elicits a process that creates knowledge and understanding between both groups, with the ultimate goal of developing more viable, suitable and preferable housing alternatives which allow older persons to live independently in their communities for as long as possible;
- c) seeks change in attitudes toward the role and status of older persons in planning and other areas.

Thus the goals of the case studies were primarily concerned with "process" rather than tasks, or specific quantifiable outcomes. The main objective of both case studies - creating dialogue between older persons and others such as those involved in the planning, designing, financing and managing of housing for older persons - dictated a public event to involve as many people as possible. The rationale for use of television in the case studies is based on several factors.

Watching television is consistently shown to be a major activity of

older persons. In general, the amount of viewing increases from age thirty, declining after age seventy (Davis and Davis 1985, 81).

Therefore it is possible to reach large numbers of older persons with information through television. Without excessive additional planning or inconvenience, the use of television meant that the size of the possible audience of the case study events was vastly increased. Thus the potential impact was much greater and more widely dispersed than the use of more standard methods.

Not only was television able to increase the numbers of participants, it allowed both events to be interactive. Television viewers were able to use their telephones to call-in to the live television programmes and interact with the participants at the events. Many older persons are not "joiners" and would not go to public events, although the available information and participation might be of benefit to them. Interactive television allowed such persons the opportunity to participate in the events from the privacy and comfort of their homes. Thus there were two levels of interaction in both events: interpersonal interaction between speakers and participants, and interaction between those at the actual locations of the events with television viewers via telephone.

Television can also be a powerful medium in shaping social attitudes. Just as Kuhn (1985) views television as a medium which has fostered negative attitudes toward aging and old age, she likewise acknowledges the opportunities television provides to alter the pattern of ageism. While television has distinct limitations in the types of messages it can relay, shifting ageist attitudes is possible through media attention to aging issues and in communicating positive and real

images of old age and aging. Davis and Davis suggest that development of local age-orientated programmes on local community television is a "good starting point ...to erasing stereotypes and creating a more positive image of older persons" (1985, 129).

Thus the case studies sought participation in a non-traditional manner using public events recorded by live interactive television. The interactive events would provide a learning process for all involved : speakers, key participants, participants, television viewers, organizers. Therefore the quality of information generated greatly surpassed that available from other methods such as surveys or discussion groups.

This methodology has, however, the following qualifiers:

1. It is not possible to test all or a number of methods to compare their outcomes as successful collaborative planning processes. The case studies were chosen as possible ways to explore the thesis research question.
2. the chosen method is not designed to test hypotheses. The research goal is to generate a process which would result in qualitative rather than quantifiable data. Also, while replication of the case studies is possible through modeling the structure and format of the events, different processes and outcomes will probably result due to the varying participants, time, place and context.
3. The chosen methods of the case studies may not necessarily be the best methods, but they are at minimum reasonable ways to facilitate meaningful dialogue between older persons and others who make decisions about retirement or seniors' housing.

The case studies attempt to relate the experience of implementing the interactive methodology described above. The findings of the process as well as the outcomes of the two events will define the degree of success of the methodology in increasing the participation of older persons in housing issues.

#### A. Development of Method

In November of 1985, the newly-formed Liaison Committee of the Gerontology Association of British Columbia (G.A.B.C.) chose seniors' housing as the topic of its first project. After contact with the Chair of the committee, the thesis author was invited to prepare a proposal for a community event which might fit both the thesis research criteria and the goals of the Liaison Committee, to mutual advantage.

The topic goals and objectives and general format were agreed upon by the Committee members while the detailed planning and preparation work was carried out mainly by the thesis author. With the assistance of several community groups and many volunteers, the Retirement Housing Forum took place on February 22, 1986. Community television was invited to be present, and a seven hour special live programme was produced. Members of the television audience were able to participate via telephone in the conference discussions and in studio interviews which involved key conference participants.

#### B. Goals and Objectives

The goals of both events were congruent with those of the G.A.B.C. Liaison Committee:

1. establish a precedent for involving seniors in the decision-

making process;

2. provide a forum for exchange of information and opinion between seniors and professionals;

3. promote mutual education and compromise (see Appendix IV).

The specific objectives of the Retirement Housing Forum were to provide a venue for:

- a) voicing housing concerns and opinions on housing policy;
- b) creating a dialogue between older adults and those who are involved in providing housing for them, as a first step towards seniors' participation in the decision-making process;
- c) increasing awareness among older persons about the housing situation and housing alternatives;
- d) disseminating information regarding new financial mechanisms to allow use of home equity to obtain suitable, affordable retirement housing.

The objectives of the Retirement Housing Alternatives Workshop were to:

- i) create a dialogue between seniors and others, particularly those involved in making decisions about the planning and design of retirement housing;
- ii) disseminate information regarding housing alternatives;
- iii) increase awareness and interest amongst older persons about the current and possible housing alternatives.

Both case studies sought to bring together the major players in seniors' or retirement housing: older persons, professionals who design, build, provide and manage seniors' housing (local and provincial government representatives, city planners, academics, architects, consultants and developers), as well as other individuals interested in

the housing decisions of older persons. In general, the purpose of both events was to gather seniors and non-seniors together to share opinions, ideas, information and to stimulate new ideas regarding housing for older persons.

## 6.2 Case Study One : Retirement Housing Forum

This one-day conference on February 22, 1986 was entitled "Retirement Housing for the Eighties and Nineties: Myths and Realities". It provided a forum for older persons, professionals and others to meet, discuss and learn about retirement or seniors housing from one another and from housing experts.

The conference site, Heritage Hall (3102 Main Street, Vancouver), was chosen for its accessibility (bus routes and disabled-access), reasonable rental fee, and its ambience and comfort (padded chairs, wide and spacious halls, good acoustics).

### A. Programme

The underlying goal of emphasizing the views of seniors was reflected in the design of the forum. Wherever possible, resource persons who were "seniors", were chosen as speakers, interviewees and key participants. As can be seen from the forum programme (Appendix V), the one day event followed two themes, "Current Realities" and "Creative Alternatives". "Current Realities", the morning session, included three presentations.

The stage was set by a U.B.C. Planning expert who presented an overview of housing in Canada and the status of seniors' housing within this larger context. The myths and realities of seniors' housing were

discussed by a senior active in the housing field, and by a coordinator of a housing information service for Vancouver seniors. Following these presentations, comments were elicited from the seniors panel.

Small group discussions, formed of audience and panel members followed by a thirty minute discussion period ended with spokespersons from each of the eight groups reporting three main points to the assembly. Replies and comments followed from panel members. The refreshment and lunch periods offered additional time for informal discussion amongst audience and panel members.

The afternoon session began with a humorous, yet revealing skit which presented the musings of three older women on current and ideal housing. Moving from the objective of understanding what the present reality of seniors' housing is, the second half of the day focussed on "Creative Alternatives".

An overview of housing alternatives in Canada, which included a slide presentation, was followed by three presentations concerning existing options in the Vancouver area. The final speaker discussed experimental financial mechanisms which seek to release home equity to be used either to maintain existing homes or to obtain more suitable retirement housing. A comprehensive summary by a well-known academic and seniors' advocate identified six sub-themes in the day's interaction, ending with questions yet to be answered. There was also a strong recommendation for advocacy to create needed change in housing for older persons.

#### B. Participants

Forum participants included graduate students (planning,



architecture, gerontology), academics (UBC, SFU, Malaspina College), consultants, architects, planners, developers, health care professionals, and a wide cross-section of approximately fifty-five older persons, for a total of 125 registrants. Others present, speakers, and panel members, brought the total to approximately 150. Telephone calls received during the discussion periods and the live interviews totalled 160, with an estimated live television viewing audience throughout the seven hour programme of an average of well over 100,000 persons in Vancouver and Richmond (Rogers Cablevision figures).

Not only were seniors sought as key participants, speakers, and a target audience, but participation of seniors in the community was also enlisted in designing of and preparing for the forum. Pre-registration was efficiently handled by a woman over age eighty, and publicity, food preparation and serving was assisted by three local seniors networks.

Selective channeling of telephone calls from older adults in the television audience to the live interviews (which took place during the Conference intermissions), and to the hall assembly discussions, maintained the focus on seniors throughout the day.

Younger persons also contributed to the forum. Posters from local elementary school students depicting types of retirement housing they would like for themselves provided colourful backdrops in the assembly hall and television studio. In-person registration and logistics assistance was contributed by a class of U.B.C. planning students.

Several booths and display tables from developers and housing resource groups displayed new concepts in retirement housing at the back of the hall. Vancouver-East Cable 4's live coverage greatly enhanced the conference goals and objectives. A telephone call-in component enabled

viewer participation. Since this was the first attempt by Cable 4 to broadcast a lengthy production and to arrange interviews with phone-in callers, the forum became a local community and media event.

### 6.3 Case Study Two: Retirement Housing Alternatives Workshop

The November 2, 1986 televised workshop "Retirement Housing Alternatives: What are the Choices?", featured a live interactive programme involving a pre-taped video, a panel of three older persons, a professional panel of three, and television viewers whose calls were directed within the discussion by a moderator. The ninety-minute programme began with a twenty-minute pre-taped video of housing alternatives (see Appendix B for a written version), followed by a discussion by the senior and professional panels with interaction with television viewers by telephone.

#### A. Format and Participants

Following the basic format of the Retirement Housing Forum, the reaction of a panel of older persons was balanced with that of a professional panel. Constraints such as the number of available television cameras and limited studio space prohibited more than three persons on each panel.

Members of the senior panel met the following criteria:

- a) they were participants in the Retirement Housing Forum;
- b) they lived in the community in a variety of housing types: private cooperative, rental high-rise apartment, self-owned duplex;
- c) they were experienced in public speaking;
- d) they were willing to participate, which included entering the

premises of the cablevision studios during a labour dispute.

Two women were chosen to reflect the greater proportion of women in older cohorts. One was 69 years old, the other 83. The male senior was in his early seventies. This panel met together one week before the live programme to become comfortable with each other, be briefed on the programme and go over the script of the video portion of the show to ensure familiarity with the material.

The professional panel represented three main areas important to the development of seniors housing: planning, developers, and community support services. The Vancouver city planning department which was not able to be present, was replaced by an architect. A Long Term Care Administrator involved in a North-shore housing and community support service study, and a development-consultant and past-president of the Urban Development Institute completed the professional panel. All of the professional participants were experienced in public speaking, and were willing to participate in the programme in spite of the ongoing labour dispute.

Originally the programme's moderator was to be the host of the previous case study event, the forum. However, the labour dispute prohibited him from participating. The host of the programme was a widely-experienced television moderator, who currently manages the Richmond Roger's Cable 4 studios. She was briefed on the goals and objectives of the workshop, and received copies of the letters and information sent to panel members, plus the written video script.

#### B. Video

The pre-taped video (see Appendix B) contained a range of housing

options available in the Vancouver area and a discussion by a cost consultant and an architect concerning important factors in retirement housing. While the video was written, filmed and edited by the thesis author with the technical assistance of Rogers Cablevision staff, the content of the professional's discussion was their responsibility.

### C. The Programme

This event was planned because of requests by participants of the Retirement Housing forum for a follow-up session dealing with a narrowly focussed aspect of retirement housing. Due to the lack of sufficient coverage of specific housing options during the forum's programme, interest in the topic of alternatives was often expressed by forum participants on evaluation questionnaires and in personal and telephone interviews. In addition, the general lack of information regarding housing alternatives was often mentioned by older persons in informal conversation. The National Advisory Council on Aging also cites the difficulty older persons have in finding out about existing options, and how to gain access to them (Canada, N.A.C.A. 1984, 3). Thus one of the functions of the televised workshop was to be an event where information on current and new housing options could be obtained.

With the knowledge that a majority of older persons (over 50% in the City of Vancouver) live in their own homes in the community, the content of the programme was centred on and targetted to independently-living persons. Therefore the pre-taped video of options began with minor, followed by major physical, social and financial changes to existing single family homes (see Appendix B). A variety of new or rennovated housing types then followed, ending with an outline of

sheltered housing.

#### 6.4 Summary

This discussion of the case study events has outlined various components which support the thesis goals and objectives. In summary, both case studies were planned as collaborative planning processes using a non-traditional method involving public events and live interactive television. The organization, development and format of both events served to highlight the participation and perspective of older persons as key participants, live and television audience members and callers.

## CHAPTER SEVEN

### EVALUATION AND FINDINGS: PROCESS, PERFORMANCE AND PRODUCT

#### 7.1 Introduction

This chapter evaluates each case study using as criteria the stated objectives of the events, the sponsoring organization and the thesis. Because of the exploratory nature of the thesis research and the nature of the case studies, there is very little quantifiable data. The emphasis is therefore on qualitative analysis and interpretation.

Morgan (1979, 54) lists three types of evaluation : process, performance and product. "Process" is concerned with development over time, and while difficult to assess, forms a significant part of this evaluation. According to Wolfe, most evaluation of public participation takes the form of analytical and critical description of process (1979, 38).

In contrast, evaluation by objectives measures "performance" or progress toward meeting the stated goals of each event. Wolfe (1979) suggests that definition of objectives explicitly before a participatory event and then evaluating the program in terms of how successful the objectives were met, is a reasonable evaluative approach. "Feedback" from the participants, viewers and the organizers of the events will be used in assessing this aspect of evaluation. The goals of the participants as individuals or specific groups in participating in the events are not distinguished for the purposes of this evaluation.

The "product" or actual results are the findings and outcomes of the case study events. While the findings of each event are described separately, the outcomes are combined into one discussion.

The general definition of the term "collaborative planning" needs refinement for the purposes of the evaluation. Three criteria establish whether or not collaborative planning has taken place:

- i) involvement is structured on an equal basis;
- ii) meaningful dialogue results as determined by subjective opinions of participants;
- iii) interaction results in "teaching" and "learning" by both older persons and professionals.

Utilization of participant feedback in the assessment process assumes that the opinions of the participants are valuable. This type of evaluation attempts to describe the adequacy of the speakers, the content of the presentations, the amount learned by participants, and also the performance of the sponsoring group in planning and conducting the events.

Participant feedback sources for the case studies were both direct and indirect, formal and informal, and included evaluation questionnaires (forum - 18% return), written evaluations, and conversations with participants and television viewers. While, for example, responses used for evaluation of the Retirement Housing Forum were not obtained by random sampling, they included an estimated 50% of all participants. Thus they represent a sufficiently fair estimation of participant reaction to assess this event. Responses to the evaluation of the Retirement Housing Alternatives Workshop were similarly assumed to be representative of all involved.

## 7.2 Case Study One: Retirement Housing Forum

### A. Evaluation by Objectives

Both participant and viewer feedback form the basis of the evaluation of the Retirement Housing Forum, supplemented with the assessments of the conference organizers. Evaluation questionnaires numbered twenty-three (eighteen percent), written evaluations eleven (nine percent), and polled participants numbered sixteen by telephone and ten in person (twenty-one percent).

#### Objective 1. Voicing housing concerns and opinions

Comments regarding this objective overwhelmingly centred on the opportunity offered to older persons present in the audience and at home to give their points of view throughout the programme. The small group discussions were often singled out for being the most suitable means for hearing the opinions of seniors. While "there were many opportunities for everyone to speak", there were a few comments (two) regarding "inhibition to speak out" because of the ongoing presence of the television cameras. Overall, the participant feedback indicates that the forum provided a sharing of ideas and opinions by older persons and others "that is not common".

#### Objective 2. Creating a dialogue between Seniors and others

That genuine, two-way communication between seniors and professionals took place was frequently remarked by respondents. Older persons in the hall and television audiences "could question the speakers and panel members" and "everyone, including older people could converse with others in the small groups" and "learn what they were



thinking about their own housing and seniors' housing in general".

In response to the question regarding meaningful participation and interaction during the forum, only one of the twenty-three respondents indicated that seniors "were not able to speak out, and were not listened to". The small group discussions were in general praised as a means of generating quality interactions and for the information obtained.

Respondents often noted that the television coverage allowed the forum to reach a much larger audience. It "took the conference to the people". The telephone 'call-in' feature offered a channel of communication and dialogue for those seeking assistance on housing matters. Thus the responses clearly indicate that the forum generated a dialogue between older persons and others involved in decisions affecting their housing.

### Objective 3. Heightening awareness of present housing and of alternatives

The most frequently expressed comments from respondents concerned not only the high quality but the amount of information available at the forum. The panel discussion was seen as "a good venue to inform regarding major housing issues". It was noted that the real issues were "understandable and digestible". The fact that there was "probably much less of a common knowledge base prior" to the forum, attests to the quality of the presentations.

There were several comments regarding new awareness of housing options, such as limited equity coops, home-sharing and small scale private developments. Developers who did not present papers, yet who

spoke up about their projects, also provided new information and ideas.

The forum met expectations for the most part, with half of the questionnaires stating an unqualified yes, and the other half stating between yes and somewhat. No respondents answered (verbally or in writing) that the forum had not met their expectations. Judging by the frequency of comments noting how informative the forum was, this objective was perhaps the most fully met.

#### Objective 4. Information regarding new financial mechanisms

This very specific objective centred on the last presentation of the programme. Some verbal and written comments found the information "very new", "useful" and provocative. However, this was most often checked as the least useful or informative session of the day. Many comments revealed that this speaker was "too technical", non-visual, and that he "did not communicate well". The presentation focussed on reverse annuity mortgages and did not mention other new ideas in financing. Overall, this objective did not appear to have been met to the extent expected by participants and organizers.

#### B. Findings

As noted in the Canadian Broadcasting Corporation - C.B.C. "The Best Years" television programme report on the Forum, both seniors and professionals voiced their concerns and opinions in a variety of ways: from the speakers podium, in a skit that opened the afternoon session, in small group discussions, and from the floor of the forum. Home viewers were also able to call in during the seven hour programme to interact with the assembly discussions and studio interviews with forum

participants.

Information on written questionnaires, informal personal or telephone conversation indicated that the main goals of the older participants were to share experiences and ideas, exchange information from others, and to meet contacts to assist with future housing decisions. While several of the participants were sponsored by agencies or organizations, many present were individuals interested in seniors' housing.

Reports from the eight small group discussions included many issues, concerns, and questions:

- a) - What type of agency and sponsored by whom is able to liaison between older persons as housing consumers, and planners, designers and developers of housing?;
- b) - Communal eating is an important social activity for older persons, and there are many creative examples of how this can be provided in the community for older singles;
- c) - There is a general lack of affordable, suitable housing units and the inadequacy of the government rental assistance programme, Shelter Aid for Elderly Renters - S.A.F.E.R. amounts;
- d) - Housing gaps have been well-defined throughout the conference but zoning by-laws do not allow for development of needed housing types; thus an overall coordinating government agency is necessary;
- e) - There is a definite need for more two-way communication such as occurred in the forum, to determine the needs and programmes that will fit. "We can't provide the right kind of housing options unless we know what is wanted";
- f) - Management problems exist in British Columbia Housing

Management Commission - B.C.H.M.C. and non-profit managed buildings;

g) - There is a great need to train apartment building care-takers to become care-givers;

h) - Isolation of many older persons in the community is a prominent concern.

The expression of the need for sheltered housing options and the rejection of bachelor suites as adequate housing recurred throughout the discussion groups, general assembly discussions and television interviews. The request for an advocacy centre emerged from one discussion group. Other major points included the necessity of adequate funding with political power behind it, and organization of seniors to push for the political will to provide sufficient, adequate and affordable housing. That definition of what type of housing, and the "where and how decisions" must include the subjective viewpoint of older persons was stressed repeatedly.

One outspoken senior asserted that the problem of the "NIMBY" (not in my backyard) syndrome prevents many zoning changes which would permit new seniors housing development. He also remarked on the general discrimination against older people, from those "who want to warehouse us", and of the need to address housing issues differently than they have been in the past.

Four interviews were conducted for the Cable 4 television programme during the refreshment breaks and discussion group period. In keeping with the format of equal basis for seniors and professionals, each interview included a professional forum participant and an older person. During lunch, representatives of each of the five booths displaying

models or renderings of new housing options were interviewed. Their offerings in terms of varying philosophies and lifestyles were also highlighted.

Calls from senior home-viewers during these interviews expressed a variety of housing frustrations and problems such as unfair tenant selection in non-profit housing; management problems in B.C.H.M.C.-managed buildings; rental costs over 35% of income; poor design and inadequate space (bachelor units). However, several callers expressed satisfaction with their non-profit or B.C.H.M.C. units. Other callers asked where more information about social housing could be obtained, and how to go about getting the marketplace to deliver the type of housing that is preferred by older persons. The problems presented by rigid zoning and the need for innovative zoning were also addressed several times by those who called. Most callers expressed a very favourable reaction to the programme and to its theme of consultation with older persons. A hope that "more of the same thing would happen" was often voiced.

The conference summarizer reported that six themes emerged throughout the forum. To paraphrase her points:

1. There is a variety of older persons who have different housing needs and preferences. However, the requirement for an array of housing options is difficult to put into public policy. Nevertheless, the strong desire of older persons to remain independently in their communities was seen as a main determining factor in developing a range of housing choices;

2. There is a need to know the specifics of needs and preferences through consultation with older persons, and to share these amongst

professionals (policy makers, researchers);

3. Many gaps exist in housing options such as sheltered housing and in community care services to maintain independence of older persons whose capabilities decline;

4. Housing and other aspects of life (income, social contacts) are closely interrelated. Poor quality housing results in the need for greater support services;

5. Control and value of consultation and participation in the decision-making process as exemplified in cooperative housing is very important;

6. Linkages and connections should be developed between older people, developers, non-profit groups, and government to permit exchange of advice, opinions and information about housing. Of note was the apt phrase composed by one of the discussion group rapporteurs, "(apartment) building caretakers must become caregivers".

The C.B.C. "The Best Years" programme report on the Forum identified three major housing concerns: the need for more housing units; the need for better quality housing to help alleviate isolation and depression; the need to increase S.A.F.E.R. rental assistance. In their summary of the Forum, the C.B.C. also highlighted the important point that more housing dollars are only part of the answer, and with a view to creating more options, it noted a need for demonstration projects of new housing options.

A report carried in "The Elder Statesman" seniors' newspaper (Clarke 1986a) also noted the protest by older persons "against those who feel seniors should be neither seen nor heard", but who are "supposed to quietly go over in the corner and not

bother anybody." That older persons "want to be a vital part of their community and not stashed away in a corner" was seen by this report as one of the major recurring themes of the Forum.

The Forum summarizer also noted several key questions which emerged in the course of the event:

- i) Is a Ministry of Aging needed to coordinate the various services and linkages required as indicated by the forum's discussion?
- ii) Who will take the lead to fill the gaps in housing options?
- iii) How can those who didn't attend the forum be involved in a consultative process?
- iv) What are the right questions to ask to begin learning about needs and preferences and how to develop choice in housing?

### C. Recommendations from the Forum

Advocacy for quality housing and services was suggested by the conference summarizer as the avenue of action and the most effective outcome possible for the forum. The need for basic information from older persons by government agencies, housing designers and developers was seen by many participants to be as important as political advocacy. Continuing the type of interaction and dialogue between older persons and professionals, and developing seniors organizations, lobby and advocacy groups were also seen as necessary in the creation of the political will to develop housing that fits the needs of older persons. The need for older persons to ask for and if necessary, demand, a choice of adequate and affordable housing, and to make a contribution to society by actively pursuing their needs actively was also stressed by

several key participants. Recommendations regarding the planning and logistics of future forums are included in Appendix F.



### 7.3 Case Study Two : Retirement Housing Alternatives Workshop

#### A. Evaluation by Objectives

The format of this event allowed limited participant feedback. However, the opinions and assessments of panel members, television crew and support staff, and the written and verbal comments received from programme viewers after the event were used in evaluating progress toward meeting the objectives and in gathering the event's results.

Approximately forty-five persons (twenty older persons, twenty-five professionals and other non-seniors) were polled after the programme and were asked probing questions regarding the following objectives.

#### Objective 1. Create a dialogue between seniors and those involved in planning and design of retirement housing

While there was little suggestion that dialogue did not result from the workshop, there was mixed response in assessment of the amount of meaningful dialogue between members of the professional panel and the seniors panel. All of the seniors panel members and two of the three professionals as well as the programme's host felt that the dialogue and conversation amongst the panel members and with the home viewers was meaningful. The other professional felt that the seniors on the panel and those who called in were "not typical", "didn't have much of interest to say" and "didn't have good questions or comments to make". This type of response was reiterated by other developers who were polled after the programme.

Comments from the two professionals about the dissenting professional echoed the sentiments of many viewers: even though the

contribution by the Urban Development Institute (U.D.I) representative was valuable, "he spoke too much and too often", becoming the "expert" on the programme, rather than one of the participants in a discussion. As one senior termed it, "He didn't want to learn, but to teach" and "he didn't think he had to listen". Several professional and senior viewers felt that the seniors' point of view was undermined by this domination of the discussion, even though dialogue existed between members of the seniors panel and the other two professionals.

With the exception of the professionals noted above, the contribution of the callers to the programme was seen as fair to good by both professionals and seniors on the panels, and the home-viewing audience. Some viewers (three non-seniors) stated that this portion of the show was far too slow-paced and therefore not interesting.

On the professional panel, the architect and the Long Term Care Administrator felt that they had "learned a great deal" about seniors reactions to available housing. They found each of the senior panel members very different in outlook and opinion. Senior panel members stated that they "learned a lot" in terms of information from the contribution of the professionals, and from each other, but "not so much" from the viewers who called into the programme. The comment after the programme by one senior panel member and supported by the other two senior panelists that they "felt at ease during the discussion", "like we were in my living room chatting", is further indication of meaningful dialogue during the programme. Such comments also suggest that the senior panelists perceived their participation to be legitimate and that they were taken seriously as panelists.

Objective 2. Disseminate information regarding housing  
alternatives

This objective is similar to objective three but has a more quantitative nature. The main purpose of the pre-taped video shown at the beginning of the programme was to inform viewers of existing options and trends (see Appendix II for a written version). Response to the video included comments such as: "well-researched", "good coverage of options", "best summary yet seen". Other viewers found the pace of the video too fast and felt that too much information was given quickly. The pre-taped discussion by two professionals about housing was "scattered" and "less useful" or "not informative" and "poor". Several viewers suggested that this dialogue should have been deleted and the range of housing options extended in its place.

Viewers and panel members generally stated that they found the programme "informative", or "very informative", "well-researched" and "well done". Panelists, television studio staff and viewers generally stated that they learned a lot. Some professionals, including the U.D.I. representative, did not agree with the majority of viewers. Although they found the programme interesting, they did not find it informative. However, one of the panel professionals stated that the programme "did a great deal toward getting information out to the public". She felt that the programme's interactive aspect worked well and served to amplify its impact in the community.

Objective 3. Increase awareness and interest amongst older persons  
about current and possible housing alternatives

This objective is difficult to measure because of the nature of this case study event. However, the types of comments and the enthusiasm of participants, callers and other viewers, does indicate that a great deal of interest was sparked amongst older persons about their future housing decisions. The large numbers of calls to the programme itself and numerous follow-up calls to housing resources, organizations and developers shown in the video also suggests that this objective was achieved to a great degree for older viewers. For example, calls to Information Seniors Housing office by those in need of better housing increased somewhat subsequent to the broadcast and rebroadcast of the workshop. While the available data from the Information Seniors Housing office cannot establish exactly the number of calls which resulted directly from the airing of the workshop programme, it can be safely assumed that the housing programme did generate a large part of the increase in calls during the month of November.

Senior panel participants, callers and polled viewers all stated that they "learned a lot from the programme" and "found it enjoyable", "stimulating" and "very interesting". Some senior viewers and one of the professional panelists stated that they were not aware of so many available types of options as were described on the video. It is plausible that such comments would be indicative of the views of the television audience.

One of the professional panelists found that her participation confirmed her perception that a more coordinated comprehensive approach to housing and support services is needed. She also noted that more

general knowledge about housing options is needed to assist middle-age persons as well as those who are now old to make better decisions about their housing. Another panelist felt that the programme indicated a real need for information about sheltered housing and about the notion central to it: mutual support in seniors' housing.

The four television crew members who, as young volunteers, initially felt that they had little in common with the topic of the programme, found the show "interesting", and felt that they had also "learned a lot" about their grandparents perspective, and about housing options they had no knowledge of previously.

Overall, older persons, professionals and others found the programme "very good" or "excellent", "well-researched and organized". The call-in feature of the show was seen to be very important as a means of reaching those who do not attend conferences or workshops. It also allowed them to obtain information and to participate anonymously by telephoning with opinions and questions. Many of those polled expressed the hope that there will be other similar programmes. These comments were also representative of second- and third-hand feedback from both the professional, non-senior and senior communities.

## B. Findings

Telephone calls received during the Retirement Alternatives Workshop programme included twenty-two viewers who wished to participate in the live discussion and nineteen who required information. Many viewers failed to get through because the two telephone lines were often jammed with calls on hold.

The eleven calls that were part of the live programme's discussion

were from viewers sharing their preferences in housing (two), housing problems (two), successes in renovation (one), one call each for questions regarding sheltered housing, and low-income rental housing. There also were questions regarding the larger housing issues such as integrated versus segregated housing, increasing shelter allowances or the housing supply, and the facilitating role of the Mayor's Special Council Committee on Seniors.

Comments from those taking calls on the information line noted that most callers were very uninformed about available housing types and had no idea of where to go for information. Many of the calls were from people who dissatisfied with their present housing for a variety of reasons.

While it was expected that the programme's discussion would centre on reaction to the content of the pre-taped video, the issues discussed included: the need for choice in alternatives for a heterogeneous senior population; sufficient space for furniture and a separate sleeping area (bedroom); suitable and convenient locations; designs that recognize the desire to be independent and which allow "aging in place". In reply to a caller's query "Are we, in our effort to create housing environments that relate to seniors' needs as they age...in fact creating ghettos for seniors?", all three senior panelists thought that housing older persons in mixed communities is preferable. The Elder Statesman (Reed, 1986) seniors newspaper report saw the "slamming of large housing projects" as one of the two main points of the workshop discussion. The other theme was the "range of choice" that is needed in senior's housing.

One professional panelist noted that while there is a great deal of

available information about seniors' housing design, builders have not yet been convinced to change their building practices. In his view, "lobbying" by seniors would do much to change this.

With regard to social housing, reference was made to the change in B.C.H.M.C. policy that bachelor suites, which are extremely unpopular amongst older singles, will no longer be built. The inadequacy of S.A.F.E.R. was also noted. A future trend seen by the U.D.I. representative was the building of social housing in cooperation with the private sector. This was a reference to the new proposal call system of social housing delivery, and to the lobby for new programmes which will provide incentives to developers to build seniors' housing.

While the options shown in the video provided food for thought, the senior panelists stated a preference to "age in place" for as long as possible. They did, however, note the importance of having knowledge of housing alternatives - for themselves and others - to assist in making future housing decisions.

Sheltered housing was an intriguing concept for all panelists and was seen as an important new option that may be useable in existing apartment buildings. Market and small privately developed cooperatives were also discussed as innovative options that were far more plausible future options than others shown on the video.

Using home equity converted to income, secondary suites and buying debentures were discussed as possible ways to increase income or to fund renovations which increase independence for a longer period.

#### 7.4 Outcomes of the Case Study Events

The success of the two case study events have demonstrated the viability of these approaches to facilitating collaborative planning. Both events have shown that older persons are interested in being involved, and that a general planning process involving older persons and professionals on an equal basis is possible. As evident in the foregoing discussion of each event's findings, knowledge was gained in four main areas:

1. More is now understood regarding the gaps in general housing knowledge. Also identified were specific gaps in the knowledge and understanding of older persons about how housing is produced, what is available and how to access it. As well, professionals in general have misunderstood and have not incorporated into their processes, housing needs and preferences as older persons view them;
2. The case studies clarified what older persons do not need: bachelor suites and loss of independence. What they definitely do want includes choice in living arrangements in their local communities, more specific information about housing, and more involvement and interaction with policy and programme decision-makers, developers and other professionals;
3. While "what questions need to be asked" was more defined during the two case studies, it remains a rather nebulous, yet important query. Perhaps most notable was the recognition that questions do need to be asked and be asked of persons not usually consulted (older persons);
4. Approaches to seek answers to the above noted questions were more clearly defined during the case study events. These include types of events or methods which facilitate involvement and planning



participation, such as the case study events, and elements such as structure, set-up, programme, and discussion groups, which led to their success as participatory planning events. Thus the events have validity as planning processes.

Both case study events provided education of a specific public (those in attendance) as well as a more general public, (the television viewers) about older people, and it also provided education for older persons.

Information on general and specific housing issues and feedback flowed two directions. Housing issues were defined by older persons, and were discussed from various perspectives. Dialogue was created between the major participant groups, older persons and professionals.

In terms of the types of participation included in the case study events, all participants including both older persons and professionals, interacted at a more reactive level during the design and planning of the two events. Minor input into the initial process by older persons increased as the planning developed, until there was major senior participation at the events. Thus the role of older persons and professionals evolved from "cooperator in action" to "organizer of action" (see Figure 11, Quadrants 2 and 4) (Van Dyk 1978, 106).

In addition to the varying success of the case studies in meeting stated objectives, there are several direct and indirect results which augment the evaluation.

Some of the more immediate outcomes included re-broadcasting by Roger's Cablevision of both the seven hour Retirement Housing Forum (twice) and the ninety minute Retirement Housing Alternatives Workshop several times (three times in Richmond, once in Burnaby and Vancouver).

Western Cablevision re-broadcast the Workshop in December 1986 and in January 1987 in New Westminster, Surrey and Langley. Shaw Cablevision (North Shore areas) has also indicated interest in airing the Workshop. Thus further re-broadcasts of both events are probable.

Several requests for use of the video-tapes of the forum and workshop by individuals and groups in the community also suggest that the impact of these events extends beyond the success in meeting immediate objectives. In addition, several community groups are looking at the format and programme of both events as models for using community television to reach a wide audience on issues of interest to both the senior and non-senior public. Rogers Cablevision has entered tapes of the Forum in a national competition on innovative, creative community television.

Calls to the Workshop information telephone number on subsequent days numbered twelve. This remained the average for subsequent re-broadcasts of the programme for a total of forty to fifty information calls generated by the televised workshop.

In addition to the direct calls for information, the number of inquiries to the Information Seniors Housing office regarding available low-rental units, cooperatives, and sheltered housing increased about ten to fifteen percent on days subsequent to the programme's broadcast and re-broadcast. Several of these callers mentioned watching the televised workshop. The office of the architect who participated in the programme also received several follow-up calls. Other calls generated by the workshop were reported by the Abbeyfield Houses Society, a cooperative housing resource group, and Vancouver Homesharers. Calls regarding other options presented on the programme's video may have

resulted, but were not reported to the thesis author.

While it is not conclusive that the case studies stimulated greater interest in seniors' housing issues, it may be demonstrated that the Forum and Workshop assisted in promotion of housing as a topical issue for older persons and those who work in seniors' related policy and programmes. As evidence of heightened community awareness of seniors' housing, several direct outcomes emerged.

A) A group of Forum participants who expressed interest in the small-scale British sheltered housing concept of Abbeyfield met in March 1986 to learn more about the concept and its possible adoption in British Columbia. While formation of the National Abbeyfield Society preceeded the Forum, the formation of a local Vancouver society was facilitated by the forum. This group hopes to build or rennovate an Abbeyfield home within two years, while providing information and assistance to others interested in sheltered housing.

B) With impetus provided by the Retirement Housing Forum, and in response to personal and service isolation of many older persons in apartment buildings, a working group of seven older persons and community support service workers formed around a phrase coined at the Forum: "(building) Caretakers Need to Become Caregivers." The group proposed a study be done by the City of Vancouver Social Planning Department, and funding has recently become available for a small pilot project composed of questionnaires to twenty-five building caretakers (private and social housing). A follow-up workshop focussing on information services and older persons most at risk hopes to increase the understanding and knowledge of building caretakers so that they can assist those older persons they are in contact with regularly.

C) Another seniors' housing conference took place in late November 1986 which had both direct and indirect links to the Forum and Workshop. It was sponsored by the New Westminster Seniors Bureau, coordinated by the thesis author, and targetted to the areas east of Vancouver. However, the one day planning exercise with a New Westminster context involved a large number of older persons (ninety out of 140 participants) from areas throughout the Lower Mainland. Such attendance by older persons accentuated the degree of interest within the senior communities in the issues and developments in seniors' housing.

D) Recent developments in the media have more distant connections with the case study events. The Mid-day Programme of C.B.C. Television (December 3) and C.B.C. News (December 7) featured a discussion of the Home Income Plan, a new housing alternative which was discussed at both the Forum and Workshop. The plan's director felt that the workshop in particular assisted in the educative process necessary to change attitudes toward conversion of home equity.

E) The theme of one day at the up-coming two-day Annual Conference for Seniors Counsellors sponsored by the Ministry of Social Services and Housing will be Seniors Housing Options in British Columbia. Several Lower Mainland seniors counsellors attended or participated in the Forum and Workshop. In recognition of the need to distribute housing information throughout B.C., the planning committee was urged to highlight housing alternatives, and the possible participatory role of older persons. Thus it is a plausible assumption that the Forum and Workshop were linked to these subsequent events.

One of the most important successes of the two case studies was to publicize the involvement of older persons in planning. Through

increasing the awareness of participation among the general public and seniors' community, the thesis research and subsequent events encourage acceptance of this type of involvement and the willingness of older persons to be involved. Simply put, participants and viewers learned not only "what is being done and what could be done", but also that "there is much to do". A point repeatedly made at the Forum was that learning about the housing needs of seniors from seniors, was a giant step forward necessary in changing attitudes to meet housing needs and to filling gaps in the range of retirement housing options.

Another significant result of the thesis research has been development of the skills and knowledge of the thesis author in organizing and facilitating collaborative planning processes. Also the premise and aims of the Liaison Committee of G.A.B.C. have been enhanced through the two case study events in the following ways:

- i) both the Forum and televised Workshop established precedence for involving older persons in the decision-making process by bringing together on an equal basis older persons and professionals;
- ii) meaningful exchange of information and opinion occurred as indicated in the findings of the events;
- iii) mutual education for both older persons, professionals and other non-seniors occurred in both events as a result of meaningful dialogue.

Following the Liaison Committee recommendation adopted from the 1982 World Assembly on Aging, these case study events have not only given older persons a voice in housing concerns, but also have made this goal a priority in the planning, organization and format of the events.

In stressing this as a priority, the Forum, Workshop and subsequent events have begun to reverse the traditional direction of information flow. The case study events have emerged from the guiding assumption that older persons are "experts" on aging issues and professionals need to draw on the knowledge, experience and opinions of older persons when designing policies and programmes.

In meeting the objectives of G.A.B.C., the case study events and their outcomes have also shown, as stated in the thesis assumptions, that housing needs and preferences can be clarified and become part of the knowledge of planners and other professionals. Ageism was confronted throughout the processes of planning, development and presentation of each event, and older persons as pre-event assistants and participants took opportunities to become involved in issues that concern them.

### 7.5 Evidence of Collaborative Planning

As defined and discussed in the evaluation, findings and outcomes of the case study events, collaborative planning has resulted. Involvement was structured on an equal basis, and the interaction within the events consisted of both teaching and learning. A fair degree of meaningful dialogue took place between older persons and professionals who usually make decisions about seniors housing without input from the older users or consumers.

As further justification of the validity of the case study events as collaborative planning processes three points can be discussed:

1. the number of participants in each event and their roles; 2. opinions of participants and others indicate that the experience was valuable;
3. medium and longer term results were demonstrated.

1. Older participants in the Retirement Housing Forum comprised fifty percent of the key participants, twenty assistants, forty-four percent of the conference registrants, and an undetermined number within the estimated live television audience of over 100,000 and 160 telephone callers. Subsequent re-broadcasts of the programme would provide educative rather than participatory value to viewers, and are therefore not included in this aspect of the impact assessment.

The television programme, Retirement Housing Alternatives, directly involved three senior panel members, one senior assistant, nine out of eleven live calls from older persons, and an undetermined number of older viewers and callers requesting housing information.

2. As indicated in the evaluation, findings and outcomes of the case studies, most participants found the events to be valuable experiences in terms of both giving opinions and learning.

3. In the medium and longer term, both events have become models for subsequent conferences, workshops and television programmes, building upon the successes and less positive outcomes of the case study events. The New Westminster Seniors Housing Symposium for example, incorporated many of the recommendations made by the organizers of the Forum and Workshop, building on the evolving knowledge and skills of older persons and others in the community. Most significant, and also most successful, was the basic premise and goal of the symposium that older persons and professionals would be both teachers and students. Thus in terms of participation, the New Westminster symposium was more successful than the case study events in meeting the defining criteria of collaborative planning.

However, the relative success of the two case study events

establishes their validity as collaborative planning processes within a larger process of the evolution of participatory planning. The case study events have not only met their objectives and those of the sponsoring organization, they have also substantiated the assumptions and premises of the thesis.



### PART THREE : INTEGRATION

#### CHAPTER EIGHT

#### ANAYLSIS OF CASE STUDIES

This chapter relates the essential aspects of the evaluation and findings of the case studies to the broader context of the background chapters and to the thesis question and objective.

In the foregoing chapter, the descriptive analysis of the case studies presented evidence of the validity of the thesis premise, assumptions and research question. The objectives of the events and the sponsoring organization were in general met and collaborative planning established. Also illustrated was the wide impact of the case study events in the seniors and non-seniors communities in the Lower Mainland.

At least four explanations are possible for the success of the case study events in meeting their objectives as collaborative planning processes:

1. Each event was thoroughly planned with both the perspective of older persons and the underlying goal of facilitating in every possible way their involvement was foremost in mind. Consultation and involvement of older persons in every facet of planning and organizing the events assisted in meeting this underlying goal. Knowledgeable and experienced older persons and housing professionals were consulted regarding content of the events' programmes. Planning and implementation required many people, including the involvement of older persons in advertising, brochure format, registration, physical layout and set-up, audio-visuals, and as volunteers. Use of conference and workshop manuals and books (Nadler and Nadler 1977, Davis and McCallon 1974) were also very instructive for organizational and evaluative aspects of the case study

events.

2. Publicity for each event utilized the suburban and city-wide printed media, television, and radio community service announcements. Advertising in local newspapers drew many participants. However, Seniors Networks in local communities proved to be the most effective means of publicizing the events. Requesting and enlisting the assistance of many volunteers from the seniors community appeared to publicize and promote the events rapidly among seniors groups, clubs, organizations.

3. Seniors' or retirement housing is an interesting or important topic to many older persons, those in housing and service related professions, and other non-seniors. The large numbers of volunteers, key participants, participants and home viewers of the case study events suggest broad interest. Also, the subsequent New Westminster Seniors Housing Symposium, which did not have the live interactive community television component, was very well attended.

4. The live coverage of both case study events by community television made possible a wide audience beyond the live events. The interactive call-in feature no doubt increased viewership and also allowed home viewers to be involved in the programmes. The novelty of broadcasting the topic of retirement housing formatted as a combined live interactive television-live public event also may have attracted many home viewers and Forum participants. The workshop composed of a video and two panels was also a novel idea in seniors' events and programming.

### Housing Needs and Preferences

The thesis objective of developing an argument for planning seniors' housing through collaborative planning with older persons was met early in this study. The exploration of the background and rationale for this inquiry was provided in Part I. The social, political, and economic context of retirement housing issues was shown in the first chapters to be critical in understanding current housing realities, and the causes of housing gaps for older persons. This discussion formed the basis of an argument for the necessity of collaborative planning with older persons to meet housing needs and preferences. Further development of the thesis objective was substantiated by both the process and the product of the case studies as described in Chapter Seven.

However, contrary to expectations of the thesis author, there was little direct evidence in the findings of the case studies which answered the thesis question regarding how well current and future housing needs and preferences of older persons are met. Greater response from older participants directly related to the various housing alternatives was expected, particularly in the Workshop. The explicit purpose of the workshop's pre-taped video was to generate discussion centering on the Workshop's video of alternatives. During the opening statements of the programme, panelists and viewers were asked to "call-in with (your) comments and opinions about the various options". However, response to the video material during the programme was general rather than specific. As noted in the findings of Chapter Seven, few participants and callers stated preferences among the presented alternatives. Discussion was basic and only occasionally focussed on some of the presented housing types. Follow-up calls for information to

the programme's information number and to various housing resource numbers did, however, relate to specific housing types. However, the exact numbers of calls regarding which alternatives are unknown.

As indicated by the senior panel members, one possibility for the lack of response to the new housing information is that most older persons desire to remain where they are, rather than move into alternative accommodation. If this is the case, more programme information would not have increased interest in alternative options.

It may also be possible that not enough is known about the various alternatives for older persons to form and express opinions. The focus of telephone calls for information certainly indicated a general lack of knowledge in the seniors community and among the general public. More specifically, people do not understand the government housing programmes and management policies, and their rights under these. Also, older persons generally know little about the more common types of retirement housing and less about newer options and future possibilities. Moreover, the numbers and types of calls to both the Forum and Workshop indicated that many older persons and non-seniors do not know where to get information, or that they have experienced difficulty in getting adequate housing information. Thus expectations of opinions on such a new topic may have been premature.

The right questions may not have been asked during the programmes to elicit reactions to the content of the video. For example, even though the Workshop programme host knew the thesis research focus and purpose and stated these in general terms at the outset of the programme, probing questions throughout the show may have been necessary. Also, it is possible that the structure of the programmes of

the Forum and Workshop did not allow sufficient space or time for the development of opinions on housing needs and preferences.

Consultation may be a new role for older persons. To be asked for opinions with little previous thought, knowledge or information may be difficult as well as unfamiliar.

Another possibility is that older persons are in general dealing with so many day-to-day housing problems that forming an opinion about other housing options simply is not relevant. One workshop caller, for example, was dealing with the death of a spouse and loss of pension such that rental costs were ninety percent of his income. Conceptual and theoretical issues can only have meaning to those functioning beyond the level of meeting basic needs.

There is also the probability that both the Forum and Workshop will have latent effects when older persons make housing decisions. For example, nearly one year after the Forum, the Liaison Committee received a letter requesting information about one of the new options discussed at the Forum (Reverse Annuity Mortgages). This indicates that information and knowledge is more likely acted upon in the medium and longer term.

Recent and forthcoming C.M.H.C. non-technical publications for the general public will fill some of the gaps in knowledge about housing, but more effective methods of housing information distribution would seem to be necessary. As shown by the thesis research these might include public events, interactive community television programmes and housing resource telephone lines. Also, education of key persons in the networks of the various communities, such as an upcoming conference for Senior Citizen Counsellors, is a probable strategy for effective

dissemination of general and specific housing information. It may then be more plausible for the thesis research question to be answered.

According to the "decision pyramid" by Kantrowitz (1985) (see Figure 12), acceptance of an idea is a series of nested changes.

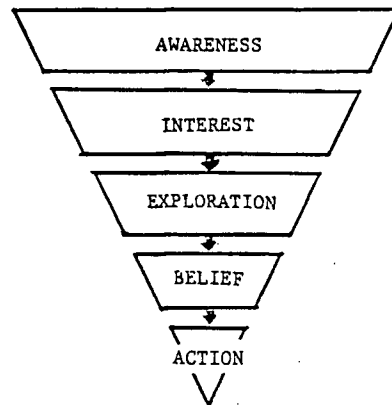


Figure 12. Decision Pyramid (From Kantrowitz 1985, 28)

The thesis sought change at the initial two steps of "awareness" and "interest". Becoming more aware of or more exposed to new housing forms and new ways of involving older persons in the planning process were objectives in the case studies. Interest in both "awareness" and "involvement" was also an objective sought and evidenced in the case study findings and outcomes. "Exploration" of new housing forms and "involvement" or belief are a third and fourth step many seniors and professionals are undertaking also as evidenced in the case studies. These are necessary steps before "action" or activity based on the newly integrated information is possible.

The findings of the case studies discussed in the previous chapter indicate that older persons, as well as builders, designers, planners and other professionals, appear to be at a reactive level of thinking regarding what is possible to achieve in housing options. Although older

persons and other non-seniors noted the significance of both case study events in demonstrating the value and legitimacy of participating with older persons in planning housing, long-standing processes and exclusionary attitudes will change slowly.

As noted by several Workshop viewers, the dominance of the discussion by the developer panelist replayed the notion of the stereotypical housing professional: developers say what the needs are by the choices they make available. That the developer and other similar professionals did not find the Workshop particularly interesting or informative re-affirms the bias of their profession. They were unable to "hear" the expressed needs because those needs were not congruent with their preconceptions and what is in their self-interest. While such an analysis may not be true for the development community at large, this is a prime example of ageism and the vanity of "professionalism". This criticism is made simply because "we must admit that a problem does exist, and only then will we begin to directly address this issue" (Williamson, Evans and Powell 1982, 243). Sensitizing "experts" and professionals to the ramifications of their thinking, attitudes and practices is necessary so that they "will be in a better position to do something about it" (Ibid., 244).

The above pattern is similar to findings from the 1984 "Listen To Me" series of cross-Canada workshops involving older persons and professionals in a study of the involvement of older Canadians in decision-making. Evaluation of the programme revealed that while the older participants found the events very worthwhile and informative, professional participants felt far less positively. Ninety-one percent of the older persons involved in the workshops recognized the need to

promote senior involvement, compared with only nine percent of the professionals (Canada 1985b, 8). Professionals in general did not think that it was necessary nor of value for older persons to be involved with them in decision-making. Although they had participated in the workshops, professionals were "not aware of the needs and concerns of seniors and how seniors were affected by their decisions" (Ibid.). The attitudes of professionals toward involving older persons and others in planning and decision-making may also be influenced by the necessity of a slower pace, on-going education and information roles, and different language and skills as noted in Chapter 5.

Thus it can be assumed from the case studies and from N.A.C.A. documentation, that professionals and older persons in general have differing expectations of their roles and status, and the goals of planning processes. This lends support to the necessity for more education of professionals in order to change their attitudes so that participation of older persons may be viewed as a vital component in planning and decision-making.

However, that professionals did participate in the case study events, and that they also expressed interest and a willingness to be involved in similar events, suggests that there has been some degree of change in the acceptance by professionals of collaborative planning with older persons. Whether or not such acceptance will lead to the devolving of decision-making to include older persons equally in power and in influence, is not known. It is broader context and systems within which professionals work, provide any constraints to full participation by Van Dyk's or Wandersman's definitions. Nevertheless, professionals can question established planning processes such as the general lack of



involvement of older persons on the grounds that participation is efficient and moreover, the most effective way of understanding and meeting needs and preferences in housing and other areas.

It is, however, older persons who have the most to gain by being involved in issues that affect them. The participants in the case study events obviously believed this to be so. They were and are willing to participate in seniors' housing issues. But older persons must also be educated to be "partners" in the planning and decision-making process (Canada N.A.C.A. 1982, 4). Inclusion in processes such as the case studies and their outcomes is one step. More importantly, older persons must take a "pro-active" attitude and make their needs and concerns known. They must also advance arguments for the changes they desire in housing or in the housing planning and development process. In addition, older persons must effectively and actively pursue organization and the power to meet those ends. As noted by Williamson, Shindul and Evans, "political change will only be effected as a response to the sustained collective action of the elderly and other groups acting on their behalf" (1985, 261).

It may not be possible for a great deal of change to be initiated by those currently old. However, pre-retirement cohorts are in better health, financial positions and have higher education levels with which to advance their needs and preferences. This group is not so distant from all of us who will one day be the older persons who are the subject of the thesis. This is the strongest argument for changing the current non-involvement of older persons in issues that affect them. It is Blythe's clarity that cannot be ignored: "The present situation cannot change until we drop our detachment... until society can say 'we are

they', things will remain much as they are" (1980, 104). As Humphrey Carver wrote, we at least owe it to ourselves, "the old people of the future" (1962, 108). Fundamental changes in attitude begin with "our own rejection of it (current housing realities and attitudes) for ourselves, and then in our refusal to impose it on others" (Comfort 1976, 33).

## CHAPTER NINE

### SUMMARY AND CONCLUSIONS

#### 9.1 Summary

This thesis has explored collaborative planning as a method of involving older persons in the process of creating seniors' or retirement housing. Beginning with principles based on the right of older persons to be involved in decisions which affect their lives, the thesis inquiry sought to demonstrate the need for their participation if suitable, affordable and preferable housing is to be developed, and if current social biases toward aging and older persons is to be countered. Development of this argument included examination of a comprehensive context of seniors' housing, old age and older persons. This context includes a theoretical discussion of environment and aging; the Canadian setting in terms of demographic trends and housing characteristics, "needs" and gaps; the social, political-economic context, and at the broadest level, the philosophical basis of how "man" is conceived. Also, it is pointed out that the social bias and ageism reflected in many aspects of seniors' housing was shown to be derived from how old age is perceived.

Collaborative planning as defined in the thesis is derived from a review of both the evolution of "participation in design", and from "citizen participation" in the planning literature. The two case study events incorporate into their structure, planning process and presentation, the thesis premises, principles and the understanding gained from the discussions of the micro- and macro-level contexts of older persons and their housing.

Evaluation of the case studies reveals that they met their stated objectives and were successful in demonstrating the viability of collaborative planning. Knowledge was gained in several areas, including more understanding about: housing gaps; what older persons value most (independence and choice); the questions which need to be asked of older persons; the need for greater cooperation and interaction between professionals and members of the senior community.

In terms of "product", the findings of the case studies substantiated what is widely felt: there is a wide range of needs and preferences that can be met only through increasing the number of housing options and choices in local communities.

The dialogue created between the two main participating groups (seniors and professionals) was a major outcome which sparked other community events which have similar goals. Thus the case study events have had an immediate impact in the Lower Mainland.

Analysis of the case studies revealed several factors important for their success: giving priority to the perspective of older persons; local publicity; focus on a topical issue; the element of live interactive television in reaching a wide audience. Within the case study findings there was little evidence of how well current and future housings needs and preferences are met by existing housing options. Several possible explanations for this result were offered, such as there is not enough information or knowledge about the various alternatives in the seniors' community; the reviewed options were not yet relevant for those who were participants.

"Reactive" rather than "pro-active" modes of thinking are still evident within the professional community as well, preventing wider

involvement of older persons in planning and decision-making. Older persons must, therefore, be more "pro-active", seeking and demanding the means by which to gain what they need and prefer in all areas of their lives, including housing. Non-seniors can and must assist in this process of change, for they are the future seniors.

The case studies are of value to planners and others as a resource more in terms of the effectiveness and outcomes of the "process" than in terms of their "product" or findings. The events, both as process and product, have already benefitted other events in the Vancouver area seniors' community. The case study events can facilitate the aims of similarly focussed public events involving older persons.

The case study events have influenced the thinking of many older persons who were involved either as participants in the planning and presenting of the events, or as audience members. More importantly, by being involved, many participants (seniors and non-seniors) have realized the benefits of this type of participation, and have gained knowledge and understanding of the older persons' perspective regarding retirement housing needs and preferences and other related issues, such as support services.

The findings detailed in the previous chapters should be of value to government and government agencies, as well as private sector organizations and businesses. As noted earlier, one government department has already incorporated some of the ideas and structure from the outcomes of the second case study (Workshop) into an upcoming conference.

It is hoped that the recording of the events on video will more widely distribute their usefulness as models of process or for product,

amongst the academic, seniors and professional communities. Hopefully professionals and non-professionals will be stimulated to create dialogue with older persons on housing and other issues. As stated in the thesis introduction, this study has sought to provide a departure point in the evolution of creative and effective types of collaborative planning with older persons, which will have many results, including choice of suitable and preferable retirement housing alternatives in all local communities.

## 9.2 Conclusions

Findings and outcomes outlined in the previous chapter show that both case study events had an impact in the community, with immediate and longer term benefits to individuals and various communities in the Lower Mainland. The direct and indirect outcomes in conjunction with evaluation by objectives indicate that both events met their overall goals.

Two important observations can be made when reflecting on the thesis process and its results. Firstly, there is the realization that the dichotomy in terms of how housing is viewed by professionals and seniors must be reconciled if there are to be any significant changes in how seniors' housing is developed, the numbers and type of units, and other basic aspects. As discussed in Chapter Four, "housing as a noun" or manufactured product with economic value, is the predominant perspective of housing held by professionals and the systems of society. Older persons, in contrast, like other users or consumers, view housing "as a verb" which has meaning and intrinsic psycho-social value, which must be met within the market system. However, it has been

difficult for the larger political-economic system to "produce" suitable and preferable housing for all older persons.

Olson (1982), for example, does not believe that the current system can meet the housing needs of older persons. He believes that the profit orientation interests of past and current housing policies which focus on subsidizing and benefiting financial interests, developers, and the construction industry, cannot provide quality, affordable housing (1982, 25). Olson advocates resolving the housing cum societal crises through "a progressive transformation of the political economy" (Ibid., 228), necessitating radical reforms. Under "democratic socialism", community-defined needs would be satisfied by direct production and allocation of social benefits.

De Beauvoir similarly asserts that widesweeping societal changes for the housing and the lives of older persons are required: "It is the whole system that is at issue and our claim cannot be otherwise than radical - change life itself"(1977, 604). However, she goes beyond Olson's level of analysis to the level of social roles and daily life: "Even if decent houses are built for them, they cannot be provided with the culture, the interests and the responsibilities that would give their life a meaning."(Ibid., 602-603). Thus, if older persons could find fulfilling and meaningful roles within the social, economic and political context of their society, then decent, suitable and adequate housing would be available.

Similarly, Harms believes the conflict between housing as a product in the economic system versus a basic human need necessitating a fundamental change to the existing bureaucratic market-based system for producing housing. He proposes a "cooperative developmental model" under

which power and decision-making are decentralized, where "decisions are made by those affected by them" (1972, 194). However, it is Marshall and Tindale who argue for a "coherent theoretical perspective linking the micro-situations of old people with the macro-structures of our society" (1978, 172). They advocate the use of a symbolic interactionist approach in understanding the issues and their answers. Borrowed from sociology, and applied to the position of older persons in our society, inherent in this perspective is a conception that is freeing in terms of what is possible for "the human capacity for socially constructing reality" (Marshall, 1979, 349). The symbolic interactionist approach is based on acting and creating "reality", rather than on reacting to, and learning acceptance of, a given reality.

If aging comes to be viewed by older persons not as a given to which they adapt in degrees of successfulness (as in normative sociology and gerontology), but as "a sequence of meaningful negotiations with others" (Ibid., 352), over which they can have control and shape their own roles, lifestyles and societal relationships, the view held by themselves and by wider society will change, as will their basic lives and its components such as housing. If Rosow (1974) is correct in his argument that older persons lack norms and roles to guide their behavior, there are few impediments to such change.

The second observation which is implied from the above discussion, is the necessity for changing social attitudes toward older persons and aging. Ending mandatory retirement, increasing the social benefits and opportunities to be involved in society, will increase the income, power and influence, status and well-being of older persons. These critical changes may or may not also bring about a social perspective that



accepts old age as a natural progression of the life cycle. As Bergum (1981) argued, the larger societal view toward old age is inseparable from the form and meaning of housing for older persons. Thus, the degree to which old age is accepted will be evident in seniors' or retirement housing, and particularly in how that housing is produced.

What is amply clear is that, as Mumford wrote more than thirty years ago, "To normalize old age, we must restore the old to the community" (1956, 192). This means not just developing housing that meets needs and preferences in local areas, but including older persons as active participants in that aim, and in other social activities and decision-making that affects their lives and the lives of others. The physical integration of the homes and the social lives of older persons in every local community by Alexander, Ishikawa and Silverstein (1977) under a "pattern language" which meets their needs appears to be highly supportive of such fundamental changes. Alexander's patterns involving older persons are based on the necessity for choice in type of housing, location, size and services. Many writers such as Alexander, Ishikawa and Silverstein (1977) more recently echo Mumford's realization: "If we wish something better for ourselves, we must be prepared to put forward a program, at every phase of life, that challenges many of the dominant habits and customs of our society" (1956, 192). Collaborative planning embodies such as challenge.

# REFERENCES

- Alexander, C., Ishikawa, S. and Silverstein, M. (1981) A Pattern Language-Towns, Buildings, Construction, New York: Oxford University Press.
- Archea, J. (1982) "Conceptual and methodological conflicts in applied interdisciplinary research on environment and aging", in M. P. Lawton and T. O. Byerts (Editors), Aging and the Environment, Theoretical Approaches, New York: Springer Publishing Company.
- Arnstein, S. R. (1969) "A ladder of citizen participation", Journal of the American Institute of Planners, Vol 33, July, 216-224.
- Associated Senior Executives of Canada Ltd. (1974) Building Better, A Survey of Ontario Homes for the Aged as Viewed by Residents and an Independent Group of Senior Citizens, Toronto: Associated Senior Executives of Canada, Ltd.
- Atkin, C.K. (1976) "Mass media and the aging", in H. J. Oyer and E. J. Oyer (Editors), Aging and Communication, Baltimore, Maryland: University Park Press.
- Audain, M. (1972) "Citizen participation in national urban policy", Plan Canada, July, Vol.12 (1), 74-87.
- (1973) Beyond Shelter, A Study of N.H.A.-Financed Housing for the Elderly, Ottawa: Canadian Council on Social Development.
- de Beauvoir, S. (1977) Old Age, Harmondsworth, England: Penguin Books.
- Becker, F. D. (1977) User Participation, Personalization and Environmental Meaning: Three Field Studies, New York: Cornell University.
- Becker, K. (1983) Design Guidelines for Rest Homes-Retirement Homes in Ontario, Ottawa: Canada Mortgage and Housing Corporation.
- Bergum, C. O. (1981) "Models of man in the design of housing for the elderly", Journal of Housing for the Elderly, Vol. 1 (2), Fall, 1983.
- Blackey, W. A. and Wood, G. (1981) "Social policy issues for housing an aging population" in B. T. Wigdor and L. Ford (Editors), Housing for an Aging Population: Alternatives, Toronto: University of Toronto Press.
- Blythe, R. (1980) The View in Winter, Reflections on Old Age,

New York: Penguin Books.

Boniface, A. and Wilson, J. W. (1985) "The Need for Social Housing on the North Shore", North Vancouver, British Columbia: North Shore United Way.

Brink, S. (1985) "Housing elderly people in Canada", in G. Gutman and N. Blackie, Innovations in Housing and Living Arrangements for Seniors, Burnaby, British Columbia: Simon Fraser University.

British Columbia, Ministry of Lands, Parks and Housing (1980) Senior Citizen Housing Construction Sponsor's Handbook, Victoria: Ministry of Lands, Parks and Housing.

(1984) Annual Report, Victoria: Ministry of Lands, Parks and Housing.

(1986) An Inquiry into Social Housing in B.C.: The Search for Common Ground, Preliminary Report, April, 1986, Victoria: Ministry of Lands, Parks and Housing.

(1986) A Social Housing Report for British Columbia, Victoria: Ministry of Lands, Parks and Housing.

Burton, T. L. (1979) "A review and analysis of Canadian case studies in public participation", Plan Canada, Vol. 19 (1), 13-22.

Butler, A. and Oldman C. (1980) "The design and siting of sheltered housing: the consumer's view", Journal of the Institute of Housing, Vol. 16 (10), October, 18-20.

Calder, B. J. (1977) "Focus groups and the nature of qualitative marketing research", Journal of Marketing Research, Vol. 14, 353-364.

Canada (1985) Consultation Paper on Housing, Ottawa: Minister responsible for Canada Mortgage and Housing Corporation.

Canada, Department of Health and Welfare (1983a) Action Age: Official Proceedings of the Second Canadian Conference on Aging, Ottawa: Health and Welfare Canada.

(1983b) Fact Book on Aging in Canada, Ottawa: Minister of Supply and Services.

(1983c) Proposals for Action, Ottawa: Minister of Supply and Services.

Canada Mortgage and Housing Corporation (C.M.H.C.) (1979) Tenant

Participation in Housing Design, Ottawa: Canada Mortgage and Housing Corporation.

(1983a) Housing The Elderly, Ottawa: Canada Mortgage and Housing Corporation.

(1983b) The Private Non-Profit Housing Program, Ottawa: Canada Mortgage and Housing Corporation.

(forthcoming) Housing for an Aging Population: Development and Design Guidelines, Ottawa: Canada Mortgage and Housing Corporation.

Canada, National Advisory Council on Aging (1983a) Aging: Live and Let Live, Ottawa: Minister of Supply and Services.

(1983b) Moving Ahead With Aging in Canada, Ottawa: National Advisory Council on Aging.

(1984) "Expression", Autumn, Vol. 1 (4).

(1985a) "Seniors and decision-making", Information Newsrelease, Ottawa: National Advisory Council on Aging.

(1985b) An Evaluation of N.A.C.A. Consultation with Seniors 'Listen To Me'-Summary Report, Ottawa: National Advisory Council on Aging.

(1985c) "Expression", Spring, Vol. 2 (2).

(1986) "Expression", Autumn, Vol. 3 (4).

Canada, Public Affairs Directorate, Department of National Health and Welfare (1982) Canadian Governmental Report on Aging, Ottawa: Minister of Supply and Services.

Canada, Statistics Canada (1984) The Elderly in Canada, Ottawa: Minister of Supply and Services.

Carp, F. M. (1966) A Future for the Aged, Austin, Texas: University of Texas Press.

(1976) "User evaluation of housing for the elderly", The Gerontologist, Vol. 66 (2), 102-111.

Carp, F. M. and Carp, A. (1984) "A complementary-congruence model of well-being or mental health for the community elderly", in I. Altman, M. P. Lawton and J. F. Wohlwill (Editors), Elderly People and the Environment, New York: Plenum Press.

Carver, H. (1962) Cities in the Suburbs, Toronto: University of Toronto Press.

- Cates, F. (1986) "Community development and housing for elderly citizens", in S. Goldblatt, F. Cates and J. Phillips, Housing Canada's Seniors, Winnipeg: Institute of Urban Studies, University of Winnipeg.
- Centre for Human Settlements (1981) Aging Households, Long Term Care and Environments for the Elderly, Research Workshop on an Aging Population in Aging Communities, Vancouver: Centre for Human Settlements, University of British Columbia.
- Chellis, R. D., Seagle, J. F. and Seagle, B. M. (1982) Congregate Housing for Older People, Lexington, Massachusetts: D.C. Heath & Company.
- Clarke, R. (1986a) "Retirement Housing Forum", The Elder Statesman, April, 14-15.
- (1986b) "Senior Panelists Slam Large Housing Projects", The Elder Statesman, December, 10-11.
- Cohn, J. (1976) "Advocacy and planning: its strength, potential and future", in P. A. Kershner (Editor) Advocacy and Age, Los Angeles: University of Southern California Press.
- Comerio, M.C. (1984) "Community design: idealism and entrepreneurship", Journal of Architecture and Planning Research, Vol. 1, 227-243.
- Comfort, A. (1976) A Good Age, New York: Crown Publishers.
- Cowley, M. (1980) The View From 80, New York: The Viking Press.
- Crawford, L. (1981) "New ways - old ways", in B. Wigdor and L. Ford (Editors), Housing for an Aging Population: Alternatives, Toronto: University of Toronto Press.
- Curtin, S. (1972) Nobody Ever Died of Old Age, Boston: Little and Brown Company.
- Cutler, N. E. (1977) "Aging and voluntary association participation", Journal of Gerontology, Vol. 32, 470-479.
- Davidoff, P. (1965) "Advocacy and pluralism in planning", American Institute of Planning Journal, Vol. 31, September, 331-338.
- Davis, L. N. and McCallon, E. (1974) Planning, Conducting and Evaluating Workshops, Austin, Texas: Learning Concepts.
- Davis, R. H. and Davis, J. A. (1985) T.V.'s Image of the Elderly, A Practical Guide for Change, Toronto: Lexington Books.
- Davis, R. H., Audet, M. and Baird, L. (1973) Housing For The Elderly,

Los Angeles: Ethel Percy Andrus Gerontology Center,  
University of Southern California.

- Eckert, J. K. and Murrey, M. I. (1984) "Alternative modes of living for the elderly", in I. Altman, M. P. Lawton and J. F. Wohlwill (Editors), Elderly People and the Environment, New York: Plenum Press.
- Edwardh, J. (1981) "The political ecology of environment", in B. Widgor and L. Ford (Editors), Housing for an Aging Population: Alternatives, Toronto: University of Toronto Press.
- Ellingham, I., MacLennan, J. and Dick, N. (1984) Alternative Methods of Financing Non-Profit Senior Citizen Housing, Ottawa: Canada Mortgage and Housing Corporation.
- Faletti, M. V. (1984) "Human factors research and functional environments for the aged", in I. Altman, M. P. Lawton and J. F. Wohlwill (Editors), Elderly People and the Environment, New York: Plenum Press.
- Fichter, R., Turner, J. F. C. and Grenell, P. (1972) "The meaning of autonomy", in J. F. C. Turner and R. Fichter (Editors), Freedom to Build, Dweller Control of the Housing Process, New York: The Macmillan Company.
- Fleisher, D. "Consumer participation", in P. A. Kershner (Editor), Advocacy and Age, Los Angeles: University of Southern California Press.
- Francis, M. (1978) "Toward participatory urban design", in A. Ferebee (Editor), Proceedings of the First National Conference on Urban Design, Washington, D.C.: R.C. Publications, 374-381.
- Gelwicks, L. E. (1973) "Design concepts and issues", in R. H. Davis, M. Audet and L. Baird (Editors), Housing for the Elderly, Los Angeles: University of Southern California.
- Gelwicks, L. E. and Newcomer, R. J. (1974) Planning Housing Environments for the Elderly, Washington, D.C.: National Council on the Aging.
- Goetze, R. (1972) "Urban housing rehabilitation: two approaches", in J. F. C. Turner and R. Fichter (Editors), Freedom to Build, Dweller Control of the Housing Process, New York: The Macmillan Company.
- Golant, S. M. (1984) A Place to Grow Old: The Meaning of Environment in Old Age, New York: Columbia University Press.
- Gold, Y. (1985) "Working with private non-profit corporations", in G. Gutman and N. Blackie (Editors), Innovations in

- Housing and Living Arrangements for Seniors, Burnaby, British Columbia: Simon Fraser University.
- Goldblatt, S. (1986) "Current and future living arrangements for Canada's seniors", in Housing Canada's Seniors, Report No. 14, Winnipeg: Institute of Urban Studies, University of Winnipeg.
- Goldenberg, L. (1981) Housing for the Elderly: New Trends in Europe, New York: Garland Press.
- Green, J., Fedewa, B. E., Johnston, C. A., and Jackson, W. M. (1975) Housing for the Elderly: The Development and Design Process, New York: Van Nostrand.
- Grenell, P. (1972) "Planning for invisible people: some consequences of bureaucratic values and practices", in J. F. C. Turner and R. Fichter (Editors), Freedom to Build, Dweller Control of the Housing Process, New York: The Macmillan Company.
- Guillemard, A. M. (1983) Old Age and the Welfare State, Beverly Hills, California: Sage Publications Incorporated.
- Gutman, G. M. (1976) Senior Citizens Housing Study, Report II: After the Move - A Study of Reactions to Multi- and Uni-Level Accomodation for Seniors, Vancouver: Canada Mortgage and Housing Corporation.
- (1980) "The elderly at home and in retirement housing, a comparative study of health problems, functional difficulties and support service needs", in V. W. Marshall (Editor), Aging in Canada, Social Perspectives, Don Mills, Ontario: Fitzhenry and Whiteside, Limited.
- Gutman, G., Gee, E., Bojanowski, B. and Mottet, D. (1986) Fact Book on Aging in British Columbia, Burnaby, British Columbia: Gerontological Research Centre, Simon Fraser University.
- Hamdi, N. and Greenstreet, B. (1981) Participation in Housing, No.3: Two Case Studies, Oxford: Oxford Polytechnic Department of Town Planning.
- Harms, H. H. (1972) "User and community involvement in housing and its effect on professionalism", in J. F. C. Turner and R. Fichter (Editors), Freedom to Build, Dweller Control of the Housing Process, New York: The Macmillan Company.
- Harper, I. (1984) Housing Options for the Elderly in the Capital Region, Sheltered Housing and Other Alternatives, Victoria, B.C.: Victoria Regional District Hospital and Health Planning Commission.
- Hartman, C., Horovitz, J. and Herman, R. (1976) "Designing with the

- elderly: a user needs survey for housing low-income senior citizens", The Gerontologist, Vol. 16 (4) 303-311.
- Heumann, L. F. and Boldy, D. P. (1982) Housing For The Elderly, New York: St. Martin's Press.
- Hodge, G. (1984) Shelter and Services for the Small-Town Elderly: The Role of Assisted Housing, Ottawa: Canada Mortgage and Housing Corporation.
- Hoglund, J. D. (1985) Housing for the Elderly: Privacy and Independence in Environments for the Aging, New York: Van Nostrand Reinhold Company.
- Housing in North Toronto for Seniors (1981) The H.I.N.T.S. Report, A Survey of Seniors Housing in North Toronto, Toronto: Housing in North Toronto for Seniors.
- Howell, S. C. (1980a) Designing for Aging: Patterns of Use, Cambridge, Mass: M.I.T. Press.
- (1980b) "Environments as hypotheses in human aging research", in L. Poon (Editor), Aging in the 80's, Washington, D. C.: American Psychological Association.
- (1983) "The meaning of place in old age", in G.D. Rowles and R. J. Ohta (Editors), Aging and Milieu, Environmental Perspectives on Growing Old, New York: Academic Press.
- Hulchanski, J. D. (1984) Market Imperfections and the Role of Rent Regulations in the Residential Rental Market, Toronto: Commission of Inquiry into Residential Tenancies.
- Institute for Participatory Planning (1977) Citizen Participation Handbook, Laramie, Wyoming: Institute for Participatory Planning.
- Ittelson, W. H. (1982) "Some issues facing a theory of environment and behavior", in M. P. Lawton, P. G. Windley and T. O. Byerts (Editors), Aging and the Environment, Theoretical Perspectives, New York: Springer Publishing Company.
- Kahana, E. (1982) "A congruence model of person-environment interaction" in M. P. Lawton, P. G. Windley and T. O. Byerts (Editors), Aging and the Environment, Theoretical Approaches, New York: Springer Publishing Company.
- Kantrowitz, M. (1985) "Has environment and behavior research 'made a difference'", Environment and Behavior, Vol. 17 (1), 25-46.



- Kaplan, S. (1977) "Participation in the design process: a cognitive approach", in D. Stokols (Editor), Perspectives on Environment and Behavior: Theory, Research and Applications, New York: Plenum Press.
- Koncelik, J. A. (1982) Aging and the Product Environment, Stroudsburg, Pennsylvania: Dowden, Hutchinson and Ross.
- Krout, J. A. (1986) "Knowledge and use of services by the elderly", International Journal of Aging and Human Development, Vol. 17 (3), 153-167.
- Kuhn, M. E. (1976) "What old people want for themselves and others in society", in P. A. Kersher (Editor), Advocacy and Age, Los Angeles: University of Southern California Press.
- (1985) "Introduction" in R. H. Davis and J. A. Davis (Editors), T.V.'s Image of the Elderly, A Practical Guide for Change, Toronto: Lexington Books.
- Lawton, M. P. (1975) Planning and Managing Housing for the Elderly, New York: John Wiley.
- (1981a) "Alternative housing" , Journal of Gerontological Social Work, Vol. 3, 61-80.
- (1981b) Environment and Aging, Monterey, California: Brooks, Cole Publishing Company.
- (1983) "Metaphors of environmental influences on aging", paper presented to 1982 Symposium on Aging, Science and Metaphor, Vancouver: Committee on Gerontology, University of British Columbia.
- Lawton, M. P., Altman, I. and Wohlwill, J. F. (1984) "Dimensions of environment - behavior research: orientations to place, design, process and policy", in I. Altman, M. P. Lawton and J. F. Wohlwill (Editors), Elderly People and the Environment, New York: Plenum Press.
- Lawton, M. P. and Hoover, S. L. (1981) Community Housing Choices for Older American, New York: Springer Publishing Company.
- Lawton, M. P. and Nahemov, L. (1973) "Ecology and the aging process", in C. Eisdorfer and M. P. Lawton (Editors), Psychology of Adult Development and Aging, Washington, D.C.: American Psychological Association.
- Lawton, M. P. and Simon, B. (1968) "The ecology of social relationships in housing for the elderly", The Gerontologist, Vol. 8, 108-115.
- Lawton, M. P., Windley, P. G. and Byerts, F. G. (1982) Aging and

- Environment: Directions and Perspectives,  
New York: Garland Publishing.
- Levin J. and Levin, W. C. (1980) Ageism: Prejudice and Discrimination Against the Elderly, Belmont, California: Wadsworth Publishing Company.
- Lewin, K. (1935) Dynamic Theory of Personality,  
New York: McGraw-Hill.
- Marshall, V. W. and Tindale, J. A. (1978) "Notes for a radical gerontology", International Journal of Aging and Human Development, Vol. 9 (2), 163-175.
- Maslow, A. H. (1954) Motivation and Personality,  
New York: Harper.
- McPherson, B. D. (1983) Aging as a Social Process,  
Toronto: Butterworths.
- Mendritzki, V. (1983) Senior Citizen Village Concept - Volume I and II, Summary Report, Edmonton: Alberta Department of Housing.
- Meyers, P. (1982) Aging in Place, Strategies to Help the Elderly Stay in Revitalizing Neighborhoods, Washington, D.C.: The Conservation Foundation.
- Midwinter, E. (1985) "The aging class: vanguard of the revolution" in A. Butler (Editor), Ageing, Recent Advances and Creative Responses, London: Croom Helm.
- Morgan, J. C. (1979) Becoming Old, New York: Springer Publishing Company.
- Mumford, L. (1956) "For older people - not segregation, but integration", Architectural Record, May, 191-194.
- Murray, H. A. (1938) Explorations in Personality, New York: Oxford University Press.
- Murray, J. A. (1985) "Designing non-institutional settings", in B. Wigdor and L. Ford (Editors) Housing for an Aging Population: Alternatives, Toronto: University of Toronto Press.
- Myles, J. (1981) "Comparative public policies for the elderly", in A. Guillemard (Editor), Old Age and the Welfare State, Beverly Hills, California: Sage Publications Incorporated.
- Nadler, L. and Nadler, Z. (1977) The Conference Book, Houston, Texas: Gulf Publishing Company.
- Newman, S. J., Zais, J. and Stryk, R. (1984) "Housing older America", in

- I. Altman, M. P. Lawton and J. F. Wohlwill (Editors), Elderly People and the Environment, New York: Plenum Press.
- Novak, M. (1985) Successful Aging, The Myths, Realities and Future of Aging in Canada, Markham, Ontario: Penguin Books, Canada.
- O'Bryant, S. L. (1983) "The subjective value of 'home' to older homeowners", in Journal of Housing for the Elderly, Vol. 1 (1), Spring-Summer, 29-43.
- Olson, L. K. (1982) The Political Economy of Aging: The State, Private Power and Social Welfare, New York: Columbia University Press.
- Ontario Association of Homes for the Aged (1984) Designed for Seniors, Woodbridge, Ontario: Ontario Association of Homes for the Aged.
- Oriol, W. E. (1982) Aging in All Nations, Washington, D.C.: National Council on the Aging.
- Parr, J. (1980) "The interaction of persons and living environments", in L. Poon (Editor), Aging in the 80's, Washington, D.C.: American Psychological Association.
- Pastalan, L. A. (1981) "Housing the elderly: the evidence and issues to be resolved", in B. T. Wigdor and L. Ford (Editors), Housing for an Aging Population: Alternatives, Toronto: University of Toronto Press.
- (1983) "Demographic characteristics", Journal of Housing for the Elderly, Vol. 1 (1), Spring-Summer, 85-87.
- Peattie, L. R. "Reflections on advocacy planning", American Institute of Planning Journal, Vol. 34, 80-88.
- Phillipson, C. (1982) Capitalism and the Construction of Old Age, London: The MacMillan Press Limited.
- Pinsky, B. (1983) Stanley Knowles Cooperative: Developing a Framework for the Participation of Seniors in the Design of Their Own Non-Profit Housing Cooperative, Ottawa: Canada Mortgage and Housing Corporation.
- Rapelje, D. H. (1981) "Alternatives - how do we make them happen?" in B.T. Wigdor and L. Ford (Editors), Housing for an Aging Population: Alternatives, Toronto: University of Toronto Press.
- Rapoport, A. (1982) "Aging-environment theory: a summary", in M. P. Lawton, P. G. Windley and T. O. Byerts (Editors),

- Aging and the Environment, New York: Springer Publishing Company.
- Regnier, V. (1981) "Neighborhood images and use: a case study" in M. P. Lawton and S. L. Hoover (Editors), Community Housing Choices for Older Americans, New York: Springer Publishing Company.
- (1983) "Urban neighborhood cognition" in G. D. Rowles and R. J. Ohta (Editors), Aging and Milieu, New York: Acadian Press.
- Rose, A. (1981) "Social policy issues for housing an aging population" in B. T. Wigdor and L. Ford (Editors), Housing for an Aging Population: Alternatives, Toronto: University of Toronto Press.
- Rosener, J. B. (1981) "User orientated evaluation: a new way to view citizen participation", Journal of Applied Behavioral Science, Vol. 17 (4), 583-596.
- Rosow, I. (1967) Social Integration of the Aged, New York: Free Press.
- Rowles, G. D. (1978) Prisoners of Space? Exploring the Geographical Experience of Older People, Boulder Colorado: Westview Press.
- Royal Commission on the Economic Union and Development Prospects for Canada (1985) Report Volumes 1-3, Donald S. Macdonald, Chairman, Ottawa: Minister of Supply and Services Canada.
- Sadler, B. (1979) "Public participation and the planning process: intervention and integration", Plan Canada, Vol. 19 (1), 8-12.
- Saskatchewan Housing Corporation (1984) Taskforce on Senior Citizen Housing, Regina: Saskatchewan Housing Corporation.
- Schiff, M. R. (1980) "Post-occupancy evaluation: a research tool", in B. Wigdor and L. Ford (Editors), Housing for an Aging Population: Alternatives, Toronto: University of Toronto Press.
- Sommers, R. (1983) Social Design, Englewood Cliffs, New Jersey: Prentice-Hall Incorporated.
- Stokols, D. (1978) "Environmental psychology", Annual Review of Psychology, Vol. 29, 253-295.
- Stone, L. O. and Fletcher, S. (1980) A Profile of Canada's Older Population, Montreal: Institute for Research on Public Policy.

- Streib, G. F., Folts, M. and Hilker, M. (1981) Old Homes - New Families, Shared Living for the Elderly, New York: Columbia University Press.
- Townsend, P. (1964) The Last Refuge, London: Routledge and Kegan Paul.
- Turner, J. F. C. (1972a) "Housing as a verb", in J. F. C. Turner and R. Fichter, Freedom to Build, Dweller Control of the Housing Process, New York: Macmillan Company.
- (1972b) "The reeducation of a professional", in J. F. C. Turner and R. Fichter, Freedom to Build, Dweller Control of the Housing Process, New York: Macmillan Company.
- United Nations (1982) Report of the World Assembly on Aging, New York: United Nations Publications.
- Van Dyk, N. (1978) "Participation in the development of Cooperative Communities", Ottawa: Carleton University (Mimeographed).
- Vancouver City Planning Department (1979) Affordable Housing: Who Requires Assistance, Vancouver: City of Vancouver.
- Wandersman, A. (1979a) "User participation, a study of types of participation, effects, mediators and individual differences", Environment and Behavior, Vol. 11 (2), 185-208.
- (1979b) "User participation in planning environments, a conceptual framework", Environment and Behavior, Vol. 11 (4), 465-482.
- Whiting, D. (1986) "A senior's home...designs for independent living", Gerontion, Vol. 1 (3), May-June, 23-25.
- Whiting, D. and Woodwark, B. (1985) A Senior's Home, Design for Independent Living, Calgary, Alberta: Alberta Department of Housing.
- Williamson, J. B., Evans, L. and Powell, L. A. (1982) The Politics of Aging, Power and Policy, Springfield, Illinois: Charles C. Thomas Publisher.
- Williamson, J. B., Shindul, J. A. and Evans, L. (1985) Aging and Public Policy, Social Control or Social Justice?, Springfield, Illinois: Charles C. Thomas Publisher.
- Wilson, J. W. (1981) "Cast me not off - locational policy for homes for the Elderly" in J. W. Wilson (Editor), The University Goes to Town, Burnaby, British Columbia: Geography

Department, Simon Fraser University.

- Windley, P. G., Byerts, T. O. and Ernst, F. G. (1974) Theory Development in Environment and Aging, Report from a Conference held at Kansas State University, Manahathan, Kansas April 1974, Washington, D.C.: Gerontological Society.
- Windley, P. G. and Scheidt, R. J. (1980) "Person-environment dialectics: implications for competent functioning in old age", in L. Poon (Editor), Aging in the 80's, Washington, D.C.: American Psychological Association.
- Wolfe, J. (1979) "Evaluation of objectives: a case study and commentary on public participation"; Plan Canada, Vol. 19 (1), 38-48.

APPENDIX A

Types of Independent Housing

(adapted from Brink 1985, 14-15)

## TYPES of INDEPENDENT HOUSING

### I Independent Living

- a) Owned or Rented Self-Contained Units
  - single family homes
  - rental apartments, townhouses
  - condominiums
  - coop unit ( house, mobile home)
  - mobile home
  - shared accomodation ( boader, homesharer)
  - hostel or hotel accomodation (SRO)
- b) Owned or Rented Units Specifically Designated, Designed or Modified for Seniors
  - cottages
  - apartments or townhouses
  - coop units
  - condominiums
  - retirement communities

### II Supported Independent Living

Housing that is supported with services ( meals, housekeeping, limited personal assistance) from project, family, community, government programmes, or with special unit design.

- a) Self-Contained Units with support services
  - single family homes
  - rental apartments or townhouses
  - condominiums
  - mobile homes
  - live-in housekeeper
  - homesharing (informal, formal)
- b) Not Self-Contained Units, Congregate Style (Shared Communal Areas - meals, bathrooms, other living areas )
  - home of others - family or relatives
    - boarding home
    - foster home
  - retirement hostel or hotel
  - group homes
  - old age homes
- c) On-Site Services - Shelter or Congregate Housing with an on-site Manager/Caretaker

(Adapted from Brink, 1985, pp. 14-15 )



APPENDIX B

Range of Housing Alternatives

(Written Version of Video Script for Retirement Housing Workshop,  
November 2, 1986)

## Range of Housing Alternatives for Older Persons

### Living in the Community

(written version of video script for "Retirement Housing Alternatives: What are the Choices?", Rogers Cablevision Production, November 2, 1986)

#### 1. Home Improvement Programmes

A) The B.C. Tax Deferral Program allows homeowners over age 65 to defer their property taxes until their homes are sold. The cost is 2% interest less than prime rate on the total amount deferred.

B) The B.C. Home Owner's Grant pays older homeowners up to \$630 a year toward property tax assessment. Local city or municipal halls have information about both the tax deferral and home owner grant programmes.

C) Renovation can make your home more suitable to your needs. Canada Mortgage & Housing Corporation offers the Residential Rehabilitation Assistance Program to assist homeowners and landlords to adapt homes or apartments for disabled persons. Up to \$10,000 as a low interest loan is available. Half of this amount may not have to be repaid depending upon your income.

D) CMHC publishes a booklet on making housing accessible. It is called Housing the Elderly and is available for \$2 from the Vancouver CMHC office. Also available is a free booklet called Housing Programmes and Services for Elderly Persons.

E) Assistance to upgrade the insulation in your home is available BC Hydro. Under their insulation program, a loan of up to \$750 at twelve and one-half percent interest can be repaid through your monthly Hydro bill.

## 2. Home Equity Conversion Plans

allow older persons with equity in their homes to convert it into supplemental income while they remain in their existing homes, or move to other accomodation. In a few weeks, a Vancouver company will make available a flexible home income plan that will allow you to retain the title to your home and receive either an income stream for life, a lump-sum upfront, payment to your estate, or any combination of these. In return, upon your death, your home becomes the property of the investor.

## 3. Shared Housing

is two or more unrelated persons living together. Each has a private space, and all share common areas such as the kitchen, living room and dining area. It is similar to a family with shared responsibilities and decisions. Benefits include shared costs, increased feelings of security, companionship and assistance with maintenance, upkeep and daily activities. It can be informal or sponsored by an organization such as Vancouver Homesharers, who match older homeowners and younger persons in need of affordable housing. This type of arrangement can allow you to live independently longer in your home.

#### 4. (Accessory apartments)

Larger renovations include adding a self-contained suite apartment for a relative or homesharer. While many of these are not recognized as legal, thousands of single family homes have rental suites which provide both affordable housing and extra income for older persons. Municipal governments have been trying to resolve this quandary for some time.

#### 6. Granny flats

are removable units installed in the rear or side yard of single-family homes. They have a kitchen, bathroom, bedroom, dining and living areas. Water, sewage and electricity are connected with the main house. While relatively common in Australia as government rental units, the smaller lot size in Canada, zoning restrictions and the temporary look of the units are drawbacks.

#### 7. (Infill Housing)

In Vancouver, there are several attractive examples of small houses adjacent to larger single family homes. Some of these are attached units, others are long, thin houses in the side yards of larger homes. Two-generation families occupy some of these. They provide companionship and security close by for older relatives. Such ideas are not really new. But they are examples of what is possible using single family home lots with minor changes to the character of a neighbourhood.

## 8. (Cooperatives)

Cooperative units are owned collectively by all of the members of a cooperative. Monthly charges are like rent and cover total costs of mortgages, taxes and maintenance. Individual members are entitled to exclusive use of specific units and collective use of all common areas and facilities. In general, monthly fees are below market rents.

A) In the government-financed type of coop, shares are bought but there is no profit on the amount when a member moves. There are both integrated and seniors only cooperatives. Most of the seniors only coops are in the Fraser Valley.

B) There is a new form of cooperative called Market Coops that are very suitable for moderate income older persons. Ninety-four units in Surrey, and sixty-four in Coquitlam are currently being developed. The members' equity from 20% to 100% of the cost of their one and two bedroom units is used to finance the community. Members own, manage and control their project, and their initial investment is returned when membership ends.

C) A similar type of financing is being used to develop a 42 unit coop on the North Shore specifically designed for seniors. Initiated by West Vancouver municipality, prospective members contribute from 25 to 100% of the cost of their bachelor, one or two bedroom suites. Members have had design input and will continue to manage the project. Market coops generally cost 25% less than similar market housing.

D) This project is an interesting example of housing built by a small group of people with a similar vision of neighbourliness. They

pooled their money to obtain a mortgage to rennovate a seven-unit historic townhouse. An architect worked closely with each owner to design their home individually. After construction, the project was strata-titled. Although only one senior was involved, this project highlights the possibilities informal cooperation has for creating suitable, affordable seniors' housing.

#### 9. (Special Built Seniors Housing Complexes)

While there are many townhouse, condominium and apartment options throughout the Vancouver area, purpose built housing for older persons is becoming more common.

A) These complexes in Surrey offer mature adults homes with low maintenance, security, recreation facilities, and a community of similar-aged people. They vary in price, unit and complex size, amenities and design features. This 25 unit condominium complex in South Vancouver was specifically designed for seniors as their mobility and health declines. It has the usual features of retirement housing plus others such as emergency alarm systems and flush thresholds throughout.

B) This White Rock retirement community of 75 two bedroom units features a park-like character with a choice of unit styles. A recreational building provides a variety of leisure activities.

## 10. Mobile Homes

provide a low-cost alternative for seniors who desire smaller homes. Some of these are rental, others are lease or strata-title. There are cooperative mobile home parks for seniors in outlying areas of Vancouver, such as this large seniors only complex in downtown Chilliwack, and adult only mobile home parks like these in Surrey.

## 11. Sheltered Housing

is housing that provides independent living in houses or apartments with any of the following features: a live-in housekeeper, nursing staff or services, meal services or communal dining, emergency call system, transportation and recreational services. Units may be owned or rented and the size of these projects varies.

### Larger-scale projects include:

A) (Concord Homes) this private senior's project in White Rock. It has 32 self-contained units, with once-a-day communal dining, informal social activities and transportation for shopping and outings. Residents are members of a church-based non-profit society. Debentures, which receive low interest or are refundable interest-free loans, cover the costs of the studio, 1 & 2 bedroom units, except for monthly charges for maintenance and upkeep. Residents receive a life-lease.

B) (Crofton Manor) This older private development in Vancouver offers apartment living in bachelor and one bedroom units with hotel-like conveniences. Services include dining room meals, maid and linen service, on-call nursing, and a wide array of recreational and leisure programmes. On the same site, there is an intermediate-care facility.

C) (Canada Way Lodge) This Burnaby development is an apartment block of studio and one bedroom units for independent older persons. Daily lunch and dinner, and weekly cleaning are provided for a moderate fee. Some residents have spouses or close friends living in the intermediate care facility on the adjacent site, within easy access for frequent visiting.

D) (Hollyburn House) The security of adjacent supportive services is a prime feature of this new West Vancouver project for higher income seniors. Rental self-contained studio, 1 & 2 bedroom suites, dining, spa and recreational facilities are available. Within the same building in a separate area an intermediate care facility provides support services in a non-institutional atmosphere.

Small-scale sheltered housing is now being initiated in the Vancouver area by developers and church or ethnic based non-profit societies. One version is Abbeyfield of the U.K.. Several B.C. local societies, including Vancouver hope to develop non-profit renovated or new homes with approximately 8 independent residents and a live-in housekeeper. This concept is motivated by the increasing numbers of lonely older persons, rather than a need indicated by income. Independent living and privacy in the midst of a family-like home is the essence of all small-scale sheltered housing. Abbeyfield, will however, stress resident control and management.



APPENDIX C

Federal Housing Programs

(from C.M.H.C. 1983b, Appendix 1, 1-9)

# A CHRONOLOGY OF FEDERAL HOUSING PROGRAMS

## A - Market Housing Programs

<u>Date</u> <u>Initiated</u>	<u>Program Title and Description</u>	<u>Status</u>
1984	The <u>Mortgage Rate Protection Program</u> (MRPP) permits home-owners to buy long-term protection against extraordinary increases in mortgage rates at renewal.	On-going
1983	<u>Registered Home Ownership Savings Plan</u> (RHOSP) "Top-Up" allows anyone acquiring a newly-built home after 19 April 1983 and by 1 March 1985 to claim a tax deduction equal to \$10 000 less the total contributions made to the owner in previous years. An individual was also able to make tax-free withdrawals from an existing RHOSP in 1983 for the purchase of qualifying new furniture.	RHOSP "Top-Up" provision expires 1 March 1985  Furniture purchase terminated Dec. 1983
1982	The <u>Canadian Home Ownership Stimulation Program</u> (CHOSP) provided \$3 000 grants to first-time and new home buyers to create employment and stimulate the economy.	Terminated Mid-1983
1981	The <u>Canada Mortgage Renewal Plan</u> (CMRP) provided monthly payments equivalent to the amount by which mortgage and property tax payment exceeded 30 per cent of income as a result of mortgage renewal at higher rates of interest.	New commit- ments ceased 31 Dec. 1984

<u>Date Initiated</u>	<u>Program Title and Description</u>	<u>Status</u>
1981	The <u>Canada Rental Supply Plan (CRSP)</u> makes available 15-year interest-free loans of up to \$7 500 per rental unit constructed.	Terminated 31 Dec. 1984
1975	The <u>Assisted Rental Program (ARP)</u> provided interest-free assistance loans to entrepreneurs for new rental accommodation financed by private lenders in order to bring rents down to market levels. An assistance loan of up to \$1 200 per unit was granted in the first year, then the size of the loan was reduced by 1/10 of the original amount each year for a 10-year period.	New commitments terminated in 1978 but some assistance advances to 1995 under terms of 1976 agreement
1974  Reintro- duced in 1980	The <u>Income Tax Act</u> was amended to authorize the <u>Multiple Unit Residential Building Program (MURB)</u> which allowed individuals investing in rental housing to deduct from personal income (non rental income) losses arising from the capital costs allowance.	Extended several times, terminated 1979  Terminated in Dec. 1982
1974	The <u>Registered Home Ownership Savings Plan</u> , allows any resident taxpayer who does not own residential real estate to contribute to a RHOSP and subtract this contribution from his taxable income. Limited to a maximum of \$1,000 per year with a total not to exceed \$10,000.	Ongoing

<u>Date Initiated</u>	<u>Program Title and Description</u>	<u>Status</u>
1973	The <u>Assisted Home-Ownership Program (AHOP)</u> provided loans and grants to help lower-income families with one or more children become owners of modest-priced housing.	New commitments terminated in 1978, but extended assistance was provided to June, 1984.
1969	Over the years, limited dividend loans have been committed under various sections of the <u>NHA</u> (Section 9, 1944; Section 16; 16A and 15, 1954) but the objective of the <u>Limited Dividend Program</u> has remained substantially the same: to make loans to an LD housing company or individual for construction of a low-rental housing project or purchase of an existing building. Entrepreneurial activity under the program declined in the mid-1960s and in 1969 <u>NHA</u> amendments increased the loan levels to 95 per cent of value, permitted construction of projects in hostel or dormitory form as well as self-contained accommodation; the 5 per cent return limitation was relaxed, and the period of rent controls reduced to 15 years.	No activity since 1981

<u>Date Initiated</u>	<u>Program Title and Description</u>	<u>Status</u>
1963	A <u>Winter Housing-Building Incentive Program</u> provided a payment of \$500 per unit (single detached to 4-unit structures) completed in the 1 Dec. - 31 March period of 1963/1964 and 1964/1965.	Terminated April 1965
1954	The <u>Mortgage Insurance Program</u> constitutes CMHC's principal business activity. By law, all high-ratio mortgages (over 75 per cent of value of property) made by institutional lenders must be insured. Mortgage insurance protects the lender from costs incurred due to borrower default. The program is financed from insurance fees paid by the borrower when the mortgage is issued by the lender.	Ongoing
1954	<u>NHA</u> legislation also authorized CMHC to make <u>Direct Loans</u> in order to supplement mortgage funds available from private lenders when necessary (i.e., in some localities, as lender of last resort, in periods when funds low).	Ongoing. In past, volume of lending was substantial; now limited

B - Social Housing Programs

<u>Date</u> <u>Initiated</u>	<u>Program Title and Description</u>	<u>Status</u>
1978	<u>The Section 56.1 Non-Profit and Co-operative Housing Programs</u> provide a subsidy to private non-profit and co-operative housing associations and provincial and municipal non-profit housing agencies. Indian bands are also eligible recipients. The assistance is equal to the difference between mortgage amortization cost at market interest rates and at 2 per cent, and is first used to reduce total project cost, including amortization and operating costs, down to the lower end of market rents. The balance is used to assist low-income tenants residing in the project. The provincial and municipal governments may augment the federal assistance. Often, Indian bands also use it in conjunction with the Department of Indian and Northern Affairs' On-Reserve Housing Program. These programs replace those previously funded under Section 15.1 and 34.18.	Ongoing
1975	<u>A Rent Supplement Program</u> under Section 44(1) (b) of the <u>NHA</u> specifically designed for non-profit and co-operative corporations funded under Sections 15.1 and 34.18 had	Ongoing

<u>Date Initiated</u>	<u>Program Title and Description</u>	<u>Status</u>
	been legislated in 1973 but was not implemented until 1975 in those provinces for which federal/provincial master agreements had been signed. A subsidy equal to the difference between rent and 25 per cent of income is provided to low-income tenants of the non-profit and co-operative projects. The cost of the program is shared equally between the federal and provincial governments.	
1974	The <u>Rural and Native Housing Program</u> delivered under Sections 40, 34.1, 36(g) and 37.1 of the <u>NHA</u> , provides new housing and renovation assistance for low-income native and non-native people living in rural areas and towns with populations of 2 500 or less. The ownership/rental component of the program provides a loan to finance the construction of a house and subsidizes the difference between loan amortization costs and property taxes, and 25 per cent of the household income. The loan and subsidy costs are shared between federal and provincial governments on a 75-25 basis. The renovation component provides a loan to finance the upgrading of the house to meet minimum health and safety	Ongoing

<u>Date</u> <u>Initiated</u>	<u>Program Title and Description</u>	<u>Status</u>
	standards and to ensure its livability for at least 15 years. A portion of the loan is forgiven, the amount depending upon the household income. The emergency repair component provides a one-time grant to make the necessary health and safety repairs. The rehabilitation and emergency repair programs are financed by the federal government alone. A revised RNH program was approved by Parliament in June 1984, but is not yet implemented.	
1973	The <u>Section 15.1 Non-Profit</u> and the <u>Section 34.18 Co-op Programs</u> were designed to provide 100 per cent loans to non-profit charitable organizations, provincially or municipally owned non-profit and co-operative corporations whose intentions were to provide and operate modest housing for low and moderate-income householders unable to locate or afford such housing on the open market. The loan interest rates were subsidized to 8 per cent, and a 10 per cent capital contribution was provided. Priorities for funding were first, families of low and moderate income, with a high priority to areas needing new construction; second, senior citizens and third, special needs groups such as the handicapped.	Replaced by Section 56.1 programs in 1978



Date	<u>Initiated</u>	<u>Program Title and Description</u>	<u>Status</u>
		This was one of the first federal low-income housing programs which did not require matching subsidies by other levels of government.	
1969		The <u>Rent Supplement Program</u> , under Section 44.1(a) is targetted to low-income households residing in private rental accommodation and covers the difference between market rent and 25 per cent of income.	Ongoing
1969		In 1964, <u>NHA</u> amendments introduced <u>Section 43/44 Public Housing Programs</u> and expanded the low rental limited dividend program to non-profit corporations, including those owned by provinces and municipalities (Section 16, 16A). Under Section 43, a 90 per cent loan was made to provincial government housing agencies to finance the construction of a low-income housing project. Tenants pay 25 per cent of their income on rent. Under Section 44, the federal government provides a subsidy equal to 50 per cent of the operating losses on the project.	New commitments ceased in 1978, except in N.W.T. where activity terminated in 1983. Long-term subsidization of operating costs continues
1965		Special agreements entered into by federal and Prairie provinces governments to provide Native housing under Section 40 of the <u>NHA</u> .	Replaced by RNH Program in 1974

<u>Date Initiated</u>	<u>Program Title and Description</u>	<u>Status</u>
1960	Under Section 47 of the <u>NHA</u> , the <u>Student Housing Program</u> made loans available to provinces and municipalities, to universities and colleges for student dormitories, hostel or self-contained accommodation. Lounges, dining halls and other facilities required by student housing could also be included in the project.	No budget has been approved for student housing since 1978
1949	The <u>Section 40 Federal/Provincial Public Housing Program</u> introduced a partnership technique to acquire and develop land and to design, build and operate public housing projects. Capital costs and operating losses to be shared on a 75/25 basis. As a majority owner, CMHC accepted responsibility for approving, planning and designing public housing projects.	In 1978, Section 40 Program was restricted to Newfoundland, Prince Edward Island, New Brunswick and Saskatchewan
1938	When the first <u>National Housing Act</u> passed, the <u>Full Recovery Low Rental Housing Program</u> was enacted ( <u>NHA Part II</u> ). It offered 90 per cent federal long-term loans at preferred interest rates to local housing authorities, limited dividend housing companies and non-profit housing associations. These were for the construction of low-rental housing projects to be leased to low and moderate income families at below market rents.	Repealed in 1946, but intent reflected in Sections 15, 15.1 and 34.18 of the <u>NHA</u>

APPENDIX D

Terms of Reference, Liaison Committee, G.A.B.C.

## TERMS OF REFERENCE: LIAISON COMMITTEE, GABC

The goal of the Liaison Committee is to provide a forum for discussion and debate between seniors and professionals whose programs, policies and decisions affect the lives of older adults. In adopting this goal we are following the recommendation of the World Assembly on Aging Conference at Vienna in 1982: that the elderly should have a voice in matters that affect them. Specifically, the Liaison Committee aims to:

- (a) establish a precedent and develop a model for including older adults in the decision making process;
- (b) promote an exchange of information and opinion in order to reveal areas of agreement and conflict on specific topics chosen on the basis of perceived importance and/or community concern;
- (c) provide an opportunity for conflict resolution through mutual education and compromise.

APPENDIX E

Program, Retirement Housing Forum, February 22, 1986

PROGRAM: RETIREMENT HOUSING IN THE 80's AND 90's:  
CURRENT REALITIES AND CREATIVE ALTERNATIVES

8:30 - 9:00 Registration  
9:05 - 9:10 Welcome and Introduction: Dr. Beverly  
Burnside, Chair, Liaison Cttee., GABC

9:15 - 10:15 CURRENT REALITIES

Chair: Mr. James Wilson, S.F.U.

Seniors Panel: Betty Backman, Vinnian Lewis, Kent Lyons,  
Bill Pierce, Joann Robertson, Kay Stovold

Professionals Panel: Enid Buchanan, BCHMC; Dr. Gloria  
Gutman, SFU; Dr. David Hulchanski, UBC; John  
Jessup City Social Planning Dept.; Jeremy Tate,  
BC Ministry of Health, Victoria  
9:15 Dr. David Hulchanski: Overview of Current  
Housing Policy in B.C. & Canada  
9:35 Kent Lyons: Myths & Realities of Housing  
for Seniors I  
9:55 Joann Robertson: Myths & Realities of  
Housing for Seniors II

10:15 - 10:30 REFRESHMENT BREAK

10:30 - 11:00 Small Group Discussion

11:00 - 12:00 Report to Full Assembly from Small Groups;  
Questions and Comments from Hall & TV audience

12:00 - 1:00 LUNCH - served in the Hall

1:00 - 1:15 Introduction to Panel on CREATING ALTERNATIVES  
(Molly Galley, Cora Hansen & Muriel Prozeller)

Chair: Betty Backman

1:15 Patricia Baldwin: McLaren Plansearch  
Overview of Alternatives  
1:45 Gillian Elcock: Homesharers  
2:05 Elaine Duvall, Columbia Housing:  
Cooperative Housing  
2:30 - 2:45 BREAK - Refreshments  
2:45 Edward Bowes: Concord Home Society: A  
Non-governmental Initiative  
3:05 Ted Mitchell (CMHC): Financial Mechanisms to  
Create Alternatives  
3:35 SUMMARY: Mary Hill, Dept. Social Work, UBC  
3:50 CLOSING

Gerontology Assoc. of B.C. Liaison Committee

Beverly Burnside, Chair; Annie Black, Bern Grady, Cheryl Kathler  
Pat Rafferty, Judy Reise, Drake Smith, Marilyn Wallace

Forum Coordinator: Cheryl Kathler TV Coverage VanEast Cable 10  
CBC 'Best Years'

APPENDIX F

Recommendations for Future Forums  
from the G.A.B.C. Report on the Retirement Housing Forum

G.A.B.C. REPORT ON THE RETIREMENT HOUSING FORUM

RECOMMENDATIONS FOR FUTURE FORUMS

Participant feedback was useful in identifying aspects to incorporate into future planning and in suggesting ways to improve subsequent forums:

- 1) ensure that speakers understand the comprehension level of their audience;
- 2) allow more time for discussion and interaction during the small groups and the assembly discussion periods consider this type of interaction for later in the schedule when there is more to talk about;
- 3) information sheets, handouts, outlines or summaries from the speakers would be useful;
- 4) use of more visual aids that are simple, clear and specific to speakers' topics.

Other ways to facilitate meeting educative objectives of a conference of this type include:

- 5) closer attention must be paid to defining the objectives as specifically as possible. The programme should then be designed with these objectives in mind. This also entails that all members of the design committee understand, agree to and use a common model or vision of the outcome early in the planning stages;
- 6) evaluation questionnaires should be related specifically to the stated objectives to assist in the analysis of evaluation data;
- 7) ensure that the presenters can fulfill the roles assigned to them by using references and recommendations for speakers from knowledgeable and experienced conference participants. If possible, meet with speakers prior to the conference to clarify and agree upon the content



and form of their presentations;

8) safety should be ensured by securing all platform stairs, floor wires, ecetera, during set-up;

9) publicity was most effective in newspapers or by word of mouth, therefore stress these methods most in future conference planning;

10) shorten the length of the day; seven hours is too long for all but the most keen;

11) include speakers from housing developers to round out discussion;

12) names of conference participants to be interviewed on television should be gathered prior to the conference, in order to assist the Cable 10 staff and to prepare the interviewees;

13) ideally small group discussions could be audio-taped or detailed notes could be gathered from them for later compilation as part of the conference proceedings;

14) to improve the logistics of the day's events, all staff should meet together with the coordinator prior to the in-person registration period to be clear on details or last minute changes

15) the Liaison Committee proposes that the conference model outlined; here should be expanded to province-wide coverage, possibly using Cable T.V. Companies across B.C.;

16) since only a fraction of in-coming calls were aired, in future live-televised conferences arrange with Cable 10 to receive as many calls as possible by opening up extra telephone lines, and keep them open for a period after the live programme. This would facilitate:

A) possible follow-up;

B) content analysis for evaluations and research purposes;

C) compilation of a data source for external interest groups;

17) in publicity, inform the public that there will be an opportunity to phone in their questions and comments during the live programme. Questions can then be formulated prior to calling.

Although these recommendations suggest improvements for future forums, the Retirement Housing Forum was successful beyond expectations, particularly given the limited number of committee members and their time constraints. The outcome also suggests a new direction for GABC.

(exerpt from report written by C.J. Kathler, Conference Coordinator)