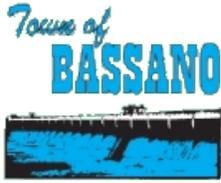


AGENDA

Intergenerational and Multigenerational Tiny Home Pilot Project Bassano
Advisory Committee Meeting: Wednesday, January 29, 2020 6:30 p.m.
Council Chambers
502 – 2 Avenue Bassano

1. **CALL TO ORDER**
2. **ADOPTION OF AGENDA**
3. **ADOPTION OF MINUTES**
 - 3.1 November 4, 2019
4. **PHASE 1**
 - 4.1 Phase 2 – Draft Report
5. **NEXT STEPS**
6. **ADJOURNMENT**



**MINUTES OF THE INTERGENERATIONAL AND
MULTIGENERATIONAL TINY HOME PILOT PROJECT BASSANO
– ADVISORY COMMITTEE MEETING HELD IN COUNCIL
CHAMBERS ON NOVEMBER 4, 2019.**

COMMITTEE MEMBERS

CHAIR

Lynn MacWilliam

MEMBERS

Kevin Jones

Mike Wetzstein

Ron Wickson

Linda Parrish

STAFF

Amanda Davis – Interim Chief Administrative Officer

OTHER

John Brown, Consultant, John Brown Architect Ltd. – Virtual Attendance

Carina Van Olm, John Brown Architect Ltd. – Virtual Attendance

Walter Valentini – Palliser Economic Partnership

ABSENT

None

1. CALL TO ORDER

The meeting was called to order by **CHAIR MACWILLIAM** at 6:57 p.m.

2. ADOPTION OF AGENDA

THAC-01/19 Moved by **MEMBER WICKSON** that the agenda is approved as presented.

CARRIED

3. ADOPTION OF MINUTES

THAC-02/19 Moved by **MEMBER JONES** that the minutes of the July 24, 2019 meeting are approved as presented.

CARRIED

THAC-03/19 Moved by **MEMBER PARRISH** that the minutes of the August 7, 2019 meeting are approved as presented.

CARRIED

THAC-04/19 Moved by **MEMBER JONES** that the minutes of the October 21, 2019 meeting are approved as presented.

CARRIED

4. OLD BUSINESS

4.1 Phase 1 Report

The advisory committee discussed the outcomes of the phase one report as presented by Brown.

Horvath departed at 8:05 p.m.

THAC-04/19 Moved by **MEMBER JONES** that the advisory committee recommend to Town council to proceed to Phase 2 of the Intergenerational and Multigenerational Tiny Home Pilot Project to development three business cases: a) multigenerational pocket lot renewal; b) intergenerational age-in-place secondary suite; and c) intergenerational age-in-place village.

CARRIED

5. ADJOURNMENT

CHAIR MACWILLIAM adjourned the Tiny Home Advisory Committee meeting of November 4, 2019 at 8:28 p.m.

Chair

Chief Administrative Officer

INTERGENERATIONAL AND MULTIGENERATIONAL
TINY HOME PILOT PROJECT BASSANO

Phase Two Report – Business Case

January 21, 2020

Prepared by
John Brown Architect Ltd.
Calgary

This phase of the report develops business cases for the multigenerational pocket lot renewal strategy and the intergenerational age-in-place secondary suite and age-in-place village strategies proposed in Phase One. Although the three business case options are based on the specific context of the Town of Bassano as the exemplar community, the findings should be generally relevant for other small urban communities in the Newell County Region.

In this report the term ‘multigenerational’ housing refers to living options for younger adults and families who are not able (for reasons of affordability for example) or willing (for reasons of desirability for example), to live in Bassano’s existing housing stock. ‘Intergenerational’ housing refers to living options for seniors who are no longer able to live in typical housing for reasons of affordability or the physical capacity to live independently.

Part 1 of this Report describes six tactics for realizing the Multigenerational Pocket Lot Renewal Strategy. Part 2 outlines the six tactics for the Intergenerational Age-Friendly Community Strategy that combines the Age-in-Place Village and Secondary Suite Strategies into one initiative. Part 3 proposes a potential implementation strategy based on the entrepreneurial concept of bootstrapping that minimizes public investment while still achieving measurable results in the short, medium, and long term.

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PART 3 – Bootstrapping the Vision

PART 1 – Multigenerational Pocket Lot Renewal Strategy Business Case

In phase one of this report, three broad community goals were identified for the multigenerational housing initiative: 1) to better meet the needs of current residents; 2) to attract new residents to the municipality; and 3) to improve the local economy. Three potential strategies were identified - Tiny House Development, Small Lot Subdivision, and Pocket Lot Renewal. Following an evaluation of the three strategies it was determined that the Pocket Lot Renewal option was the most promising approach for a multi-generational housing project in Bassano that could achieve these goals.

Summary of Phase One Findings

The Pocket-Lot Renewal strategy looks to the existing neighborhoods of Bassano for a new future. Instead of using new land to build a Tiny House Development Project or a Small Lot Subdivision, this strategy offers the potential to breathe new vitality and economic life into the town's existing pattern of houses and streets. It avoids the challenges, risks, and environmental impact of building a greenfield development while providing a potential economic benefit for current landowners.

Pocket Lot Renewal is a variation on the Small Lot Subdivision strategy in which the municipality changes the land use bylaw to allow for the subdivision of existing residential properties into multiple small lots. This form of infill redevelopment is a well-established way in which long-term residents of older communities in cities like Calgary are able to realize a better value for their original investment and exit the property market upon retirement with a financial nest egg. This redevelopment strategy also benefits the municipality because existing roads and utility infrastructures are renewed and reused, eliminating the need to incur the high cost of building a new serviced subdivision. The Pocket Lot Renewal strategy can easily accommodate redevelopment at the scale of tiny homes.

With the appropriate new land use regulations in place, each existing residential lot becomes a potential economic engine for redevelopment. Depending on the size and geometry of the property, current landowners could subdivide their property, potentially retaining the existing

residence on one of the newly created small lots. The other new lots could then be sold for redevelopment. Alternatively, the existing homeowner could sell the property 'as is' to a buyer who is interested in unlocking the redevelopment value of the land. Additional flexibility and development incentives could be provided if the municipality relaxed commercial use regulations to incent home-based businesses and start-ups within the pocket lot renewal areas.

The Pocket Lot Renewal strategy offers the potential for Bassano to develop into a more vibrant, environmentally sustainable, pedestrian oriented, live-work residential community that promotes the active reuse of existing land through a minor increase in density. This has the potential to be an attractor for new, and younger, residents. It spurs small scale entrepreneurial activity by individual landowners instead of relying on large development companies from outside the area. It is anticipated that this strategy would be sufficiently innovative and exciting to capture media attention similar to a Tiny Home project. If marketed properly, Pocket Lot Renewal could attract a new generation of residents who see a combination of economic potential alongside the high quality of life offered by Bassano.

Perhaps most significantly, this strategy provides an opportunity for existing landowners, many of whom are seniors, to capitalize on their long-term property investments and generate funds for their retirement. As noted in Part 1, the inability to sell their current home is the number one concern identified by Bassano seniors at the September Open House meeting.

A substantial challenge with this strategy is potential opposition from neighboring residents who may feel their property is being devalued by an increase in density. Based on the experience in Calgary, this can be a particularly acute problem at the beginning of the process when the first property on a street is subdivided and rebuilt at a higher density. The Calgary experience suggests that this opposition tends to go down as time goes on and more properties are redeveloped. A second challenge is the risk that, if not properly designed and managed, the Pocket Lot Renewal strategy could result in a chaotic feeling neighborhood with a haphazard development pattern.¹

¹ Brown, John. Inter-generational and Multi-generational Tiny Home Pilot Project Bassano, Phase One: Feasibility Analysis, Oct 29, 2019, pp. 19-20.

Pocket Lot Renewal Tactics

The business case for implementing the multigenerational Pocket Lot Renewal strategy is based on the desire to free up the equity that is currently locked into Bassano's housing stock due to a stagnant real estate market. This can largely be attributed to a lack of net in-migration into Bassano due to the absence of a strong job market and vibrant local economy, The Pocket Lot Renewal Strategy offers the potential to reinvigorate the real estate market with a suite of six innovative tactics that will spur renewal, attracting new investment and new residents. It is anticipated that these incentives will kickstart the real estate market and attract newcomers to the town with the potential for residents to use the investment in their home to build alternate revenue streams and support micro-scaled entrepreneurial activity. It should be noted that the ultimate long-term success of the Pocket Lot Renewal strategy is dependent on the simultaneous execution of an aggressive marketing campaign to attract new businesses to locate in Bassano.

Tactic 1: Increase opportunities for secondary suite rental accommodation

The first proposed renewal tactic increases the amount of high-quality rental accommodation by expanding the scope of secondary suite opportunities currently legislated in the Town of Bassano's *Residential Standards of Development* and developing a comprehensive directory of rental accommodation options that is readily available to potential newcomers. This tactic is relatively easy for the Town to implement and involves a modest public investment. It offers the lowest cost, risk, and barrier to entry for existing homeowners to participate in the strategy. It most likely will also have a correspondingly modest impact on economic growth and reigniting the real estate market, particularly in the short term. However, as a comprehensive strategy that could potentially engage almost all landowners, its more significant value is in building broad-based consensus that will hopefully translate into support for the other, more aggressive, tactics.

Tactic 1A: Develop a simple information program for current homeowners to help guide them in the development of a secondary suite in their current home. This should include all legislative and building code requirements as well as practical how-to design suggestions, case study examples, and best practices to maximize income generation.

Tactic 1B: Expand the *Residential Standards of Development* to include accessory buildings that contain a residential secondary suite. These could be standalone one-storey tiny home residence (laneway house) or incorporated into the second floor of a residential garage (carriage house). Consideration should be given to allow both an internal secondary suite and an accessory rental unit on a single property as a discretionary use.

Tactic 1C: Develop a simple information program for current homeowners to help them implement an accessory building rental unit on their property. This companion document to the secondary suite document would also include all legislative and building code requirements as well as practical how-to design suggestions, case study examples, and best practices to maximize income generation.

Tactic 1D: Create a compelling comprehensive, and well-designed public facing online directory of rental accommodation in Bassano. This should mimic in style and information popular short-stay rental sites such as the Airbnb directory and have a standardized template that homeowners can use to advertise their rental offerings. Ensure the rental accommodation directory is well integrated and prominently featured in all Town of Bassano based media.

Tactic 2: Increase opportunities for home-based business ventures

The second proposed renewal tactic foregrounds existing home-based business ventures and promotes other homeowners to launch micro-entrepreneurial initiatives. It builds on the existing home occupation regulations as outlined in Bassano's *Residential Standards of Development* with some potential minor changes to expand the scope of allowable business activities. This tactic is relatively easy for the Town to implement and involves a modest public investment. Provided that the legislation is carefully drafted to avoid unintended negative consequences, the risk to the Town is also modest. For homeowners, the option of starting a new home-based venture involves higher risk and cost than tactic 1 but has a higher potential for a larger economic benefit.

This tactic has the potential for a moderate to major impact on economic growth and also offers a more significant potential benefit by increasing the variety and quantity of commercial amenities which will benefit everyone's quality of life and serve to make the Town more attractive for newcomers. This tactic, at least in the beginning, will probably have only a minimal impact on the real estate market. However, as momentum builds and early adopter start-ups flourish, the tactic has the potential to attract outside micro-entrepreneurs into the Town. This will certainly help to improve real estate sales which will unlock existing equity in the property market and is the first step to a recovery of value. Like Tactic 1, this initiative could potentially engage a number of existing landowners – either as potential micro-entrepreneurs or as customers for their goods and services – and help build broad-based consensus that will hopefully translate into support for the other, more aggressive tactics.

Tactic 2A: Develop a simple information program for current and potential micro-entrepreneurs to help guide them in the development of a home-based business. This should include all legislative and building code requirements as well as links to small business plan development and marketing strategies. Explore the possibility of facilitating or sponsoring, either in-person or online, short evening courses on starting a successful home-based business and even mentoring opportunities.

Tactic 2B: Review the existing Home Occupation 2 category of Bassano's *Residential Standards of Development* and adjust as necessary to reduce friction and more fully enable micro-entrepreneurial activity. This particularly applies to parking and the volume of on-premise sales and customer/client visits.

Tactic 2C: Create a compelling, comprehensive, and well designed online directory of Bassano businesses, both conventional and home-based, in a format similar to that developed for rental accommodation in Tactic 1D. Ensure this business directory is well integrated and prominently featured in all Town of Bassano based media.

Tactic 2D: Implement a new Home Occupation 3 category in the Residential Standards of Development that can be selectively applied to appropriate areas of town that can support higher levels of commercialization including full retail operations, artisanal craft based production, and light industry such as digital fabrication. This is a more aggressive tactic and has the potential to significantly transform commercial activity in Bassano. However, this should be carefully developed to avoid any unintended consequences. It is highly recommended that it be integrated into the development and execution of Tactic 4.

Tactic 3: Create a small lot subdivision program for selected residential lots

The third proposed renewal tactic is at the core of the Pocket Lot Renewal Strategy and is intended to significantly stimulate real estate development within Bassano. It is an aggressive tactic and should therefore be approached carefully and thoughtfully to avoid any unintended consequences. At the outset at the very least, this tactic should probably be deployed on a pilot study basis within a carefully selected area(s), such as that proposed in Tactic 4.

Tactic 3 is based on the long and successful history of infill development in cities like Calgary in which the large residential lots originally created in the mid 20th Century are subdivided into two properties. In Calgary, this is typically done by creating two 25' wide by 125' deep lots out of one 50' x 125' lot, replacing an older 1200 sqft bungalow with two larger, up to date two storey homes. This tactic incents redevelopment by significantly reducing the land cost for a new home.

The small scale of this kind of redevelopment is less risky and more affordable than a multi-lot multi-unit redevelopment making it a very attractive option for both individual landowners, and small to medium size homebuilding companies. Infill redevelopment has been very successfully deployed in many established communities in Calgary. It creates an additional category of buyer - someone looking for a property development opportunity – that augments the typical homebuyer category.

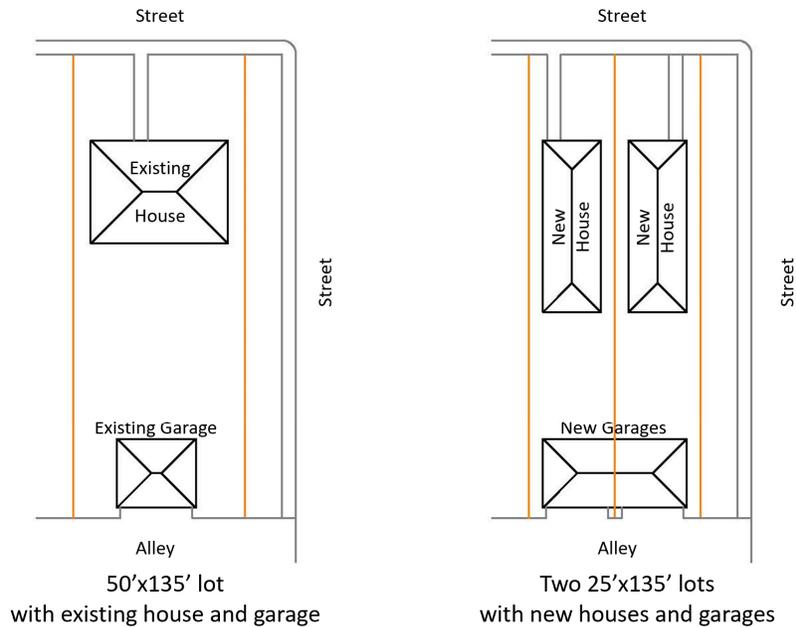


Fig 1: Typical Infill Side-by-Side Subdivision

This has fuelled activity in the real estate market over several decades and simultaneously helped long-time, typically senior, landowners to unlock the significant equity in their home. It has also improved affordability for buyers of new homes, created a highly attractive, modestly scaled investment opportunity for real estate developers, and provided a lucrative alternate project typology (outside of tract building houses in new communities) for the home building industry.

This tactic offers the potential for Bassano to offer similar benefits and economic incentives to existing landowners, newcomers, investors, and the construction industry. It provides a pathway for landowners to activate a portion of the equity in their home and leverage it into an economic opportunity. The potential of an economic benefit increases the desirability of eligible residential properties which should, over time, increase activity in the real estate market. To be truly transformative, however, this tactic needs to be run in parallel with a strong strategy for attracting new residents to Bassano in order to create enough market demand to kickstart redevelopment projects.

Given the low property values in Bassano, the Calgary model of replacing the original home with two new residences is probably inappropriate, at least in the short to moderate time frame. Instead of side-by-side subdivision, it is recommended that the town explore a front to back subdivision in order to allow the existing house to remain on one of the two new lots.

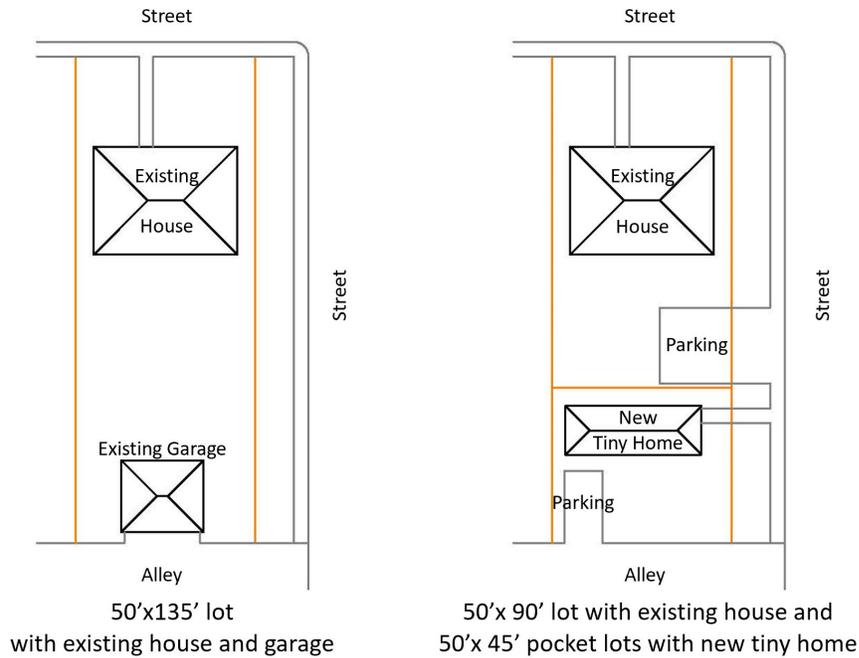


Fig 2: Pocket Lot Renewal Front-Back Subdivision

This poses some technical challenges with respect to utility servicing, fire protection access, and the provision of on-site parking that will probably limit the number of properties that are eligible for subdivision. However, a cursory review indicates that there are a significant number of corner lots in the old part of town that could be subdivided without significant changes to Bassano's development standards, particularly when combined with the emerging trend towards tiny home living. It is anticipated that more lots could become eligible for subdivision renewal with a more radically innovative approach to the development guidelines.



Fig 3: Distribution of Corner Lots in Bassano

This tactic is moderately easy for the town to implement and involves a modest public investment. It offers a low risk opportunity for a select group of current landowners looking to sell their existing property. In the early stage, this tactic is not expected to elevate real estate value as much as generate more activity in the market by introducing a new type of buyer. As momentum builds, property prices could increase modestly.

A subdivision and redevelopment project is of moderate risk to an investor, homebuilding company, or individual homeowner looking to undertake a project on their own. However, this elevated risk is offset with a correspondingly higher potential economic benefit. To mitigate this risk in the short term, and following the Calgary precedent, investors and homebuilding companies may decide to speculate on future demand by purchasing redevelopment eligible properties and holding them as rentals until there is more market demand. The biggest advantage of this investment strategy for the town is that it increases the market desirability of older sub-standard houses.

This tactic could also be an important attractor for newcomers to Bassano who see the value in purchasing an existing older property to live in while also holding it as a future investment, and wealth building opportunity by either 1) selling the subdivided property to reduce their mortgage and continue to live in the original home; 2) building a new home on the subdivided lot for sale; 3) building a new home on the subdivided lot for themselves and renting out the original bungalow for passive income; or 4) building a new home to live in and selling the original bungalow to a homebuilding company or another newcomer.

Tactic 3 has the potential to significantly impact the real estate market and be an economic benefit to landowners. However, the technical requirements to allow subdivision means that this benefit will not be available to everyone who owns a home in Bassano. If not carefully managed, this could create potential community backlash against the whole Pocket Lot Renewal strategy. This risk can probably be mitigated by combining the implementation of Tactic 3 with the more broadly available opportunities offered by Tactics 1 and 2 in a pilot study area outlined in Tactic 4.

Tactic 3A: Undertake a comprehensive planning study to develop a small lot subdivision policy. This should include a review of utility servicing capacities, and fire protection services as well as identifying which properties could be eligible for subdivision and redevelopment. Revise *Bassano's Residential Standards of Development* to allow for small lot subdivisions.

Tactic 3B: Create a detailed information guide for landowners, investors, and homebuilding companies that outlines the small lot subdivision policy. This document should include all legislative and building code requirements as well as case study redevelopment examples.

Tactic 3C: Create a compelling, comprehensive, and well designed online description of the small lot subdivision opportunity that is consistent with the public-facing directories developed in Tactics 1 and 2. Ensure this document is well integrated and prominently featured in all Town of Bassano-based media.

Tactic 4: Create the Bassano Innovation District

The fourth renewal tactic is the creation of the Bassano Innovation District (BID) in which the more aggressive tactics (2d and 3) of the Pocket Lot Renewal strategy can be piloted. The BID consists of multiple blocks of residential development, ideally in relatively close proximity to the 2nd Ave commercial area. It will have a new land-use designation that allows for higher density small lot residential development, more intensive forms of home-based business activity, and new types of public space. If successful, the Bassano Innovation District can be expanded in size and scope to meet growing demand.

There are several advantages to creating a pilot study area to test out the more aggressive tactics rather than proceeding directly into a blanket implementation across the entire town. The first is that it helps manage risk and upfront capital costs. Second, it contains any unintended negative consequences that might emerge as a result of the program into one small area. Third, it is simpler to create a special-use land use district to implement distinctive and unusual land use regulations. Finally, from a marketing point of view, concentrating pocket lot renewal activities in a small part of downtown amplifies the impact of a relatively small number of projects as opposed to having them dispersed throughout the town.

Tactic 4 is a significant undertaking for the town to implement and involves a major public investment for it to be done properly. There is a risk that the investment in public infrastructure improvements might not incent the anticipated redevelopment. However, the potential reward for undertaking this expense and risk could be major, both in terms of early-stage marketing and promotion to attract new businesses and residents to the town and the longer term economic benefit when the Bassano Innovation District starts to be built out with private investment.

Identifying the specific location and exact extent of the BID is beyond the scope of this phase of the report and is dependent on several external factors including a municipal evaluation of existing residential development, in-depth reviews of technical requirements such as lot servicing and fire

accessibility, as well as consultation with current landowners and residents. However, a preliminary review of property assets suggests two potential areas for the BID as outlined in the following map.

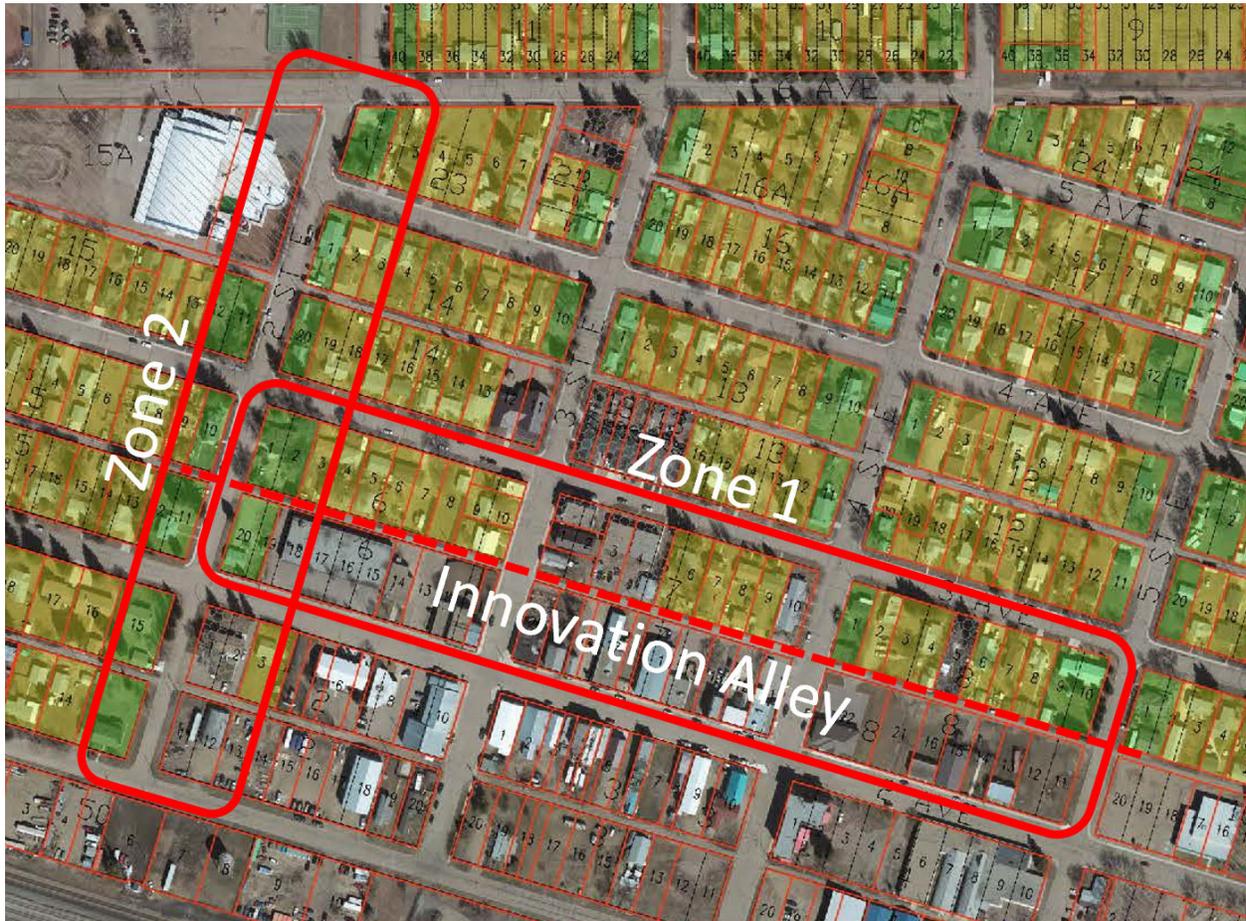


Fig 4: Bassano Innovation District and Innovation Alley

Zone 1 consists of the residential lots on the south side of 3 Ave between 2 St and 5 St. These lots share an alley with the commercial property fronting 2 Ave and would be appropriate for more intense forms of micro-entrepreneurial activity. Potential higher density small lot redevelopment in these backyards is also shielded from the rest of the residential district to the north and would have minimal impact. It is also possible to consider a capital project for the back alley shared with the commercial zone that would install underground utilities to support mid-block redevelopment projects and upgrade the appearance and functionality of the service alley into a green alley typology that supports more vibrant, people oriented public space that would enhance the redevelopment desirability for property on both the north and south sides.

Completing this public realm project, and even potentially giving the new alley a name such as Innovation Alley sends a powerful marketing message about the potential of the Bassano Innovation District to chart a new and exciting course for the town.

Zone 2 consists of the first or potential first and second lots on both the east and west sides of 2 St between 1 Ave and 6 Ave. It is likely feasible to service at least a moderate number of newly subdivided small lots in this zone from the existing utilities running under 2 St with minimal required upgrading. A modest capital improvement project to upgrade the streetscaping of 2 St is recommended to clearly delineate the existence of the Bassano Innovation District, even prior to the commencement of any private development.

Although Zones 1 and 2 do not have to be developed at the same time, together, the two zones link together to create an exciting public realm walking area that connects the school, arena, swimming pool, Innovation Alley and the existing commercial ventures on 2 St. There is the potential for this very visible public investment in the Town to spur private speculation on the adjacent properties with all three of the previous tactics.

Tactic 4A: Explore the technical feasibility, community support, and economic requirements of establishing the Bassano Innovation District.

Tactic 4B: Complete a planning study and concept design for the BID including 3D renderings of the future vision for Innovation Alley and 2 St. to be used for public consultation and, if the project proceeds, future marketing and promotion.

Tactic 4C: Create a compelling, comprehensive, and well designed online description of the Proposed Bassano Innovation District Concept that is consistent with the public-facing documents developed in Tactics 1, 2, and 3. Ensure this document is well integrated and prominently featured in all Town of Bassano-based media.

Tactic 5: Create a larger-scale small lot redevelopment program

The fifth proposed renewal tactic expands the small lot redevelopment typology in Tactic 3 to include larger scale, comprehensively developed, multi-lot projects. This tactic creates an opportunity for a sophisticated investor, land developer, or homebuilder to consolidate a block of properties to create a small lot 'village' of new residential properties for sale or rent. It is recommended that these developments capitalize on the small lot nature of the development to create new forms of communal space, secondary circulation patterns, and potentially innovative strategies for cars and parking. It is also recommended that the developers of these projects be encouraged to incorporate advanced sustainability practices to reduce the environmental impact of the construction and long-term operation of the homes. This can become an important part of Bassano's Innovation brand.

This tactic is probably best considered as a second stage intervention after there has been some momentum built up through the completion of several individual small lot projects and the creation of demonstrated in-migration of newcomers. However, it is prudent to complete the preparatory work revising Section 18 – Dwelling Group of Bassano's *Residential Standards of Development* to accommodate projects of this nature as early in the process as possible so that this aspirational form of small home living can become part of the long term marketing vision for Bassano and that the town is prepared to act when someone expresses interest in a large project.

Tactic 5 is moderately easy for to implement and involves a modest public investment. It has modest risk to the town. Even one larger scale redevelopment project would potentially have a significant economic impact on Bassano. Projects of this kind are inherently risky for the developer. However, it is anticipated that only a sophisticated player in property development would undertake a project of this size and is well aware of the economic risk as well as the economic reward should it be successful. A project like this would probably not elevate overall real estate values but there is a potential spinoff effect in which potential out of town buyers attracted to Bassano by the project would decide to purchase either an existing property or buy into a single home renewal project. It offers a low risk opportunity for a select group of current landowners looking to sell their existing property.

Tactic 5A: Undertake a comprehensive planning study to develop a land use policy for a Small Lot Dwelling Group. Revise Bassano’s *Residential Standards of Development* to allow for Small Lot Dwelling Group projects.

Tactic 5B: Commission a concept design of a prototype small lot village including renderings that highlight the many features and high quality of life potential of this kind of project.

Tactic 5C: Create a compelling, comprehensive, and well-designed online description of the prototype concept design that is consistent with the documentation generated in the other tactics. Ensure this information is well integrated and prominently featured in all Town of Bassano-based media.

Tactic 6: Investigate early-stage public incentives to kickstart tactics 1, 2, and 3.

The sixth and final proposed renewal tactic identifies the potential impact and cost of a series of small-scale incentive programs that will encourage newcomers to rent newly created secondary rental suites described in Tactic 1, existing residents and newcomers to start new micro-entrepreneurial ventures described in Tactic 2, and existing residents and newcomers to undertake a small lot subdivision project described in Tactic 3. Although careful cost-benefit and benefit-sensitivity analyses need to be completed to finetune the nature and value of these incentives, it is anticipated that even a moderate incentive could have a moderate short-term impact, if for no other reason than it signals the depth of commitment and intentionality of the town to create a new and more vibrant future for Bassano and its residents.

For example, the town could initiate a program in which it pays the last two months of an initial one-year residential lease contract for a secondary suite that meets a pre-set quality standard and is posted on the town’s Rental Directory up to a maximum of \$2,000 per newcomer. This could attract individuals to Bassano who work in Newell County and could relocate to Bassano. This increased demand would in turn incent current secondary suite owners to upgrade their units and participate in the Rental

Directory. It would also encourage other homeowners to create new or upgraded secondary suites. A pool of \$10,000 per year for 3-5 years would probably be sufficient to operate an effective incentive program that would get Tactic 1 up and running and self-sustaining. It is anticipated that similarly scaled programs could also incent early adoption of micro-entrepreneurial start-ups, perhaps through a combination of forgiving application fees and free or subsidized enrolment in business development courses or mentorship programs in the first year or two of operation. An incentive program for small lot subdivision might reimburse successful applicants for a portion of the fees and other professional costs associated with subdividing their property. Given the higher risk of subdivision projects, however, the incentive program for this tactic might need to be larger. A comparative investigation is required to determine which of the first three tactics would most benefit from an incentive program and help the town determine if, how, and when it should invest public funds in this manner.

Tactic 6A: Undertake an analysis of the cost and potential economic return of a modest incentive program for Tactic 1, promoting upgraded and new secondary rental accommodation.

Tactic 6B: Undertake an analysis of the cost and potential economic return of a modest incentive program for Tactic 2, promoting micro-entrepreneurial home-based start-ups.

Tactic 6C: Undertake an analysis of the cost and potential economic return of a modest incentive program for Tactic 3, promoting small lot subdivision and redevelopment of existing single residential lots.

Multigenerational Target Market Considerations

Conventional marketing theory identifies a continuum of effort along which potential target markets are distributed.² On one end of the spectrum are current customers who typically require the least amount of effort to 'upsell' a new product or service because they are already familiar advocates of the offering.

² <https://medium.com/@driftt/relationship-marketing-why-marketing-to-customers-not-strangers-is-the-future-of-marketing-4da744812a83>

At the other end is the public at large who require a great deal of time and effort to make them aware of the new product or service and convince them to participate.

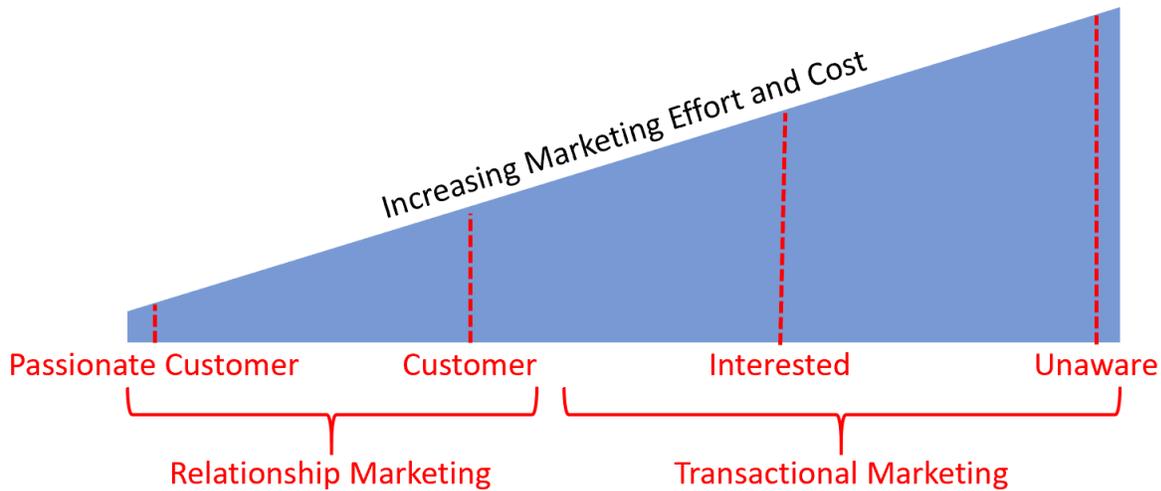


Fig 5: Traditional Marketing Cost Curve

Applying this to the Bassano multi-generational project, the ‘lowest friction’ target market to reach are current residents of the town. These people have already chosen Bassano as a desirable place to live and are probably favorably predisposed to at least considering the opportunities provided by the Pocket Lot Renewal strategy. The ‘competition’ for their engagement in the project is their status quo residency in Bassano. The potential for even a most short-or longer-term economic benefit would most likely be sufficient to convince this group to act.

The next target market on the continuum are existing residents of Newell County. These people have already chosen to live and work in the larger region and have probably made a long-term commitment to the area. Most could probably relocate their residency without disrupting their employment. The ‘competition’ for this group is their existing life in another town. This group would probably consider a move to Bassano if the potential economic benefit offered by the pocket lot redevelopment project was sufficiently exciting to outweigh the economic and social cost of a local move.

The third group are rural job seekers who are relocating for new employment opportunities in either Bassano or the larger region. These people may or may not be familiar with small town rural life and will most likely not have an existing social network in the area. The ‘competition’ for enticing individuals in this group to move to Bassano are other towns in the regions, including Brooks. The most competitive of these options will have more amenities and are better known and more established places to relocate than Bassano. While this group may find the economic benefit of the Pocket Lot Renewal project sufficiently desirable to choose Bassano as their new place or residence, it is also reasonable to assume that this group may be reluctant to invest in a longer term redevelopment opportunity before they know that they want to make a long term commitment to the town and/or region.

The final target market are people living in Calgary and regional cities who are employed in sectors of the economy that allow them to work remotely and may be interested in a rural lifestyle. These urban transplants are at the far end of the spectrum and are difficult to attract. The most significant ‘competition’ for this group is probably the lifestyle opportunities in the cities. Secondary competition would be the more charismatic small-town living options in the mountains. This group might consider a move to Bassano if the economic and lifestyle opportunities offered by the Pocket Lot Renewal project was combined with a compelling entrepreneurial-friendly work environment that included a cohort of like-minded residents and potential links to the Calgary and/or Medicine Hat business community.

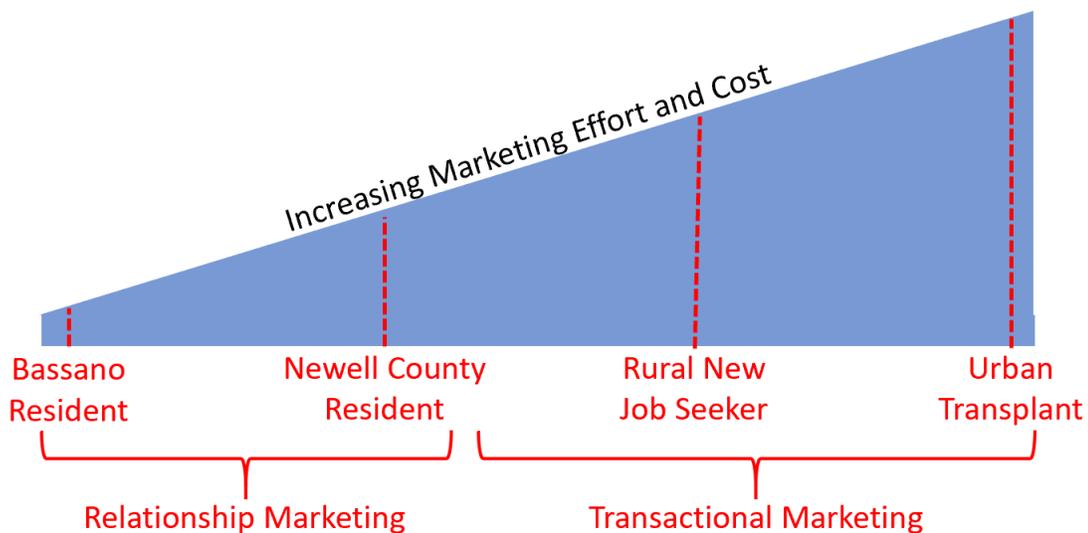


Fig 6: Pocket Lot Renewal Strategy Marketing Cost Curve

Within this target market spectrum are individual target personas. These personas represent a finer grain of market understanding because they identify key motivations, objectives, and limitations for potential market segments. There are four primary target personas for the Bassano multi-generational Pocket Lot Renewal strategy.

The Investor

The Investor persona is a businessperson who lives in Bassano or Newell County and has enough equity to invest in a passive real estate opportunity such as individual residential property development and owning residential or commercial rental properties. The Investor persona is driven almost exclusively by dispassionate economic interest. They invest their money carefully and wisely and would most likely participate in the Pocket Lot Renewal strategy if the balance of risk and return was better than other investment opportunities. At the outset of the project, when there is no proven track record, the most likely Investor persona to get involved would probably be those who have a history of property development or rental management in Bassano. Other Investor personas will be attracted to the opportunity over time when the Pocket Lot Renewal strategy proves to be a success.

The Micro-Entrepreneur

The Micro-Entrepreneur persona is an individual, couple, or family who have the capacity to expand their economic portfolio with a small business venture based out of their home. This could be a residential rental unit in their backyard, a self-run home-based business, a small commercial rental unit or some combination of the above. The Micro-Entrepreneur persona is ambitious and willing to think outside of the box to enhance their economic position. This persona may not have a lot of free capital to invest but are willing to bootstrap a project through sweat equity. They are also more likely to have a higher tolerance for risk. Examples of a Micro-Entrepreneur could be a stay-at-home parent with a small business skill such as hairdressing or catering, a tradesperson who could self-build a rental unit, or someone looking to establish a start-up venture that could range from a conventional personal service business to artisan production and even light digital fabrication. Micro-Entrepreneurs could be existing Bassano or Newell County residents as well as newcomers to the region, including those from Calgary and other cities.

The Landowner

The Landowner persona is an individual or couple who live in Bassano and own a piece of residential property in central Bassano on which they live. This persona typically has high levels of equity invested in their home and long-time landowners may no longer have a mortgage. The Landowner persona is distinguished from the Investor and the Micro-Entrepreneur because they do not have the interest and/or the ability to personally undertake a redevelopment project on their property. However, they are certainly interested in unlocking some of their equity. This is particularly true for senior Landowners who are particularly motivated to free up capital to supplement their retirement income. Despite its passive role, this persona is a critical player in the success of the Pocket Lot Renewal strategy because they own a high percentage of the older residential property in the center of Bassano. While the optimal strategy for the Landowner persona is to simply sell their property to an Investor or Micro-Entrepreneur, this may be difficult at the outset when the strategy is still untested. Given the stagnant nature of the current residential real estate market, this persona might be interested in innovative incentive programs that would offer them a higher return in return for putting up their land as part of a redevelopment venture. This would need to be carefully developed and well monitored to prevent individuals, particularly seniors, from being taken advantage of.

The Newcomer

The Newcomer Persona is an individual, couple, or family who are considering relocating to Bassano or Newell County for employment opportunities in existing businesses or new ventures such as the new cannabis facility. The Newcomer persona does not likely have the capital to immediately invest in a redevelopment project. However, as potential renters of pocket lot rental units, they play a very important role in the overall strategy. An ongoing supply of renters is a critical factor driving the interest of Investors and Micro-Entrepreneurs to undertake redevelopment projects.

The Bassanian

The Bassanian persona is a catch-all group comprised of everyone else who lives and works in Bassano. This persona is not personally involved in the Pocket Lot Renewal strategy as an Investor, Micro-Entrepreneur, Landowner, or Newcomer. However, they require special attention in order to ensure

that there is broad community support for the initiative. This group also has the potential to play a role in passively promoting the Pocket Lot Renewal initiative to their network of friends and family. Mapping these five personas against the relationship marketing spectrum reveals that Investors and Micro-Entrepreneurs exist across the marketing cost spectrum. Landowners and Bassanians cluster at the left side of the graph with Newcomers further to the right in the transactional marketing area. The multiple instances of Newcomers, Investors and Micro-Entrepreneurs on the right side of the spectrum indicate that market effort increases as familiarity with Bassano, Newell County, and rural living decreases. In other words, attracting someone from Calgary is going to take more effort than attracting someone from Brooks.

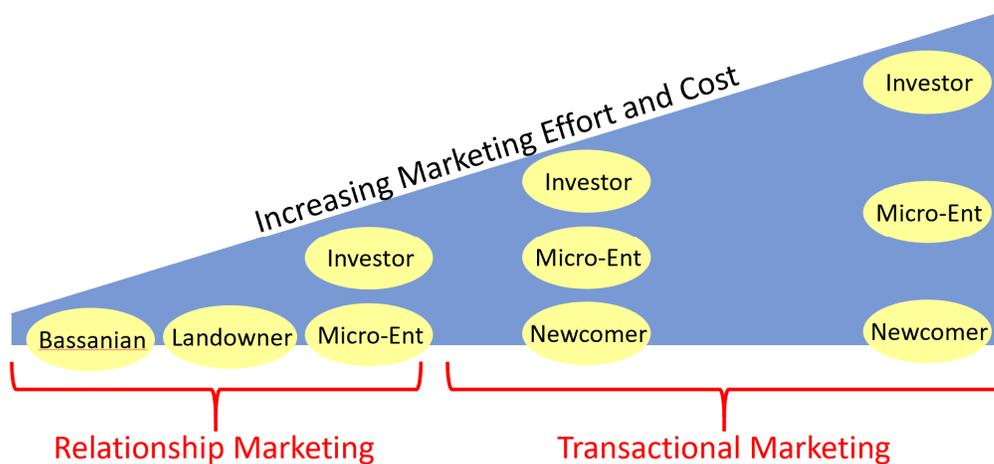


Fig 7: Pocket Lot Renewal Persona

Analyzing this spectrum suggests that in the first stage of implementation it would probably be prudent to build commitment and excitement for the project amongst Landowners and Bassanians while simultaneously identifying potential local Investors and Micro-Entrepreneurs and working with them to be early-stage initiators of the first redevelopment projects. In the second stage of implementation, after the first one or two projects are underway, the marketing effort should then expand to include attracting Newcomers from Newell County as residents in these new projects. Following that would be marketing to Micro-Entrepreneurs and Investors from Newell County. The third stage, occurring after the initial redevelopment projects are complete and inhabited, would expand to include attracting potential Newcomers, Investors and Micro-Entrepreneurs from beyond Newell County, including eventually the bigger cities - Medicine Hat, Lethbridge, and Calgary.

Analysis of Multigenerational Project Business Case

This section provides a high-level summary of the preliminary cost estimates, potential risks and impacts, and anticipated target market uptake for executing the six tactics identified in the Pocket Lot Renewal strategy. Given the preliminary nature of this report and the far-reaching nature of the strategy and associated tactics, the analysis is presented in graphic form so that decision-makers can better understand not only the benefits and challenges of each proposed tactic but also the relationship between the various components of the strategy.

Public Investment Analysis

The public investment required to initiate most of the tactical components of the Pocket Lot Renewal strategy is not anticipated to be large. However, there are too many unknowns to provide a detailed estimate of these costs at this time. The following chart ranks expected investment into three categories – modest, moderate, and major while identifying the type of costs that would be expected in each category. These include the cost for the Town of Bassano’s employees and contract planning consultant to undertake studies and write policy as well as the cost of external consultants such as architects and communication/ graphic design/ software consultants required for specialized services.

Tactic Four, the creation of the Bassano Innovation District, requires a large investment for infrastructure upgrades to servicing and streetscaping. It is too early in the process to provide even a rough estimate of these costs without some initial work by the town and their external planning consultant. Fortunately, the cost of doing the groundwork to prepare for this kind of construction upgrading project is anticipated to be moderate and the resulting documentation, in the form of conceptual renderings, site plans, and narrative descriptions, can be used to kickstart the promotion of Bassano and its innovation brand to newcomers and potential investors.

Public Investment Requirements

Tactics	Initial Cost	Implementation Cost	Ongoing Cost
1 - Increase Opportunities for Secondary Suites			
1A: Secondary Suite Information Program	Modest (1)	Modest (1)	Nil
1B: Revised Residential Standards of Development	Modest (1)	Modest (1)	Nil
1C: Accessory Building suite Public Information Program	Moderate (1)	Modest (1)	Nil
1D: Public Online Rental Accommodation Directory	Modest (2)	Moderate (2)	Modest (2)
2 - Increase Opportunities for Home-Based Businesses			
2A: Home based Business Information Program	Modest (1)	Modest (1)	Nil
2B: Revised Residential Standards of Development	Modest (1)	Modest (1)	Nil
2C: Public Online Business Directory	Modest (2)	Moderate (2)	Modest (2)
2D: Home Occupation 3 Category	Moderate (1)	Modest (1)	Nil
3 - Create a Small Lot Subdivision Program			
3A: Revise Residential Standards of Development	Moderate (1)	Modest (1)	Nil
3B: Small Lot Information Guide for Developers	Modest (1)	Modest (1)	Nil
3C: Small Lot Subdivision Public Information Program	Modest (2)	Modest (2)	Nil
4 - Create the Bassano Innovation District			
4A: Technical and Economic Feasibility Study	Moderate (1)	Major (3)	Moderate (3)
4B: Planning Study and Concept Design	Moderate (2)	Major (3)	Moderate (3)
4C: BID Public Information Program	Modest (2)	Major (3)	Moderate (3)
5 - Create a Larger Scale Small Lot Renewal program			
5A: Revise Residential Standards of Development	Moderate (1)	Modest (1)	Nil
5B: Concept Design of Prototype Project	Moderate (2)	Modest (2)	Nil
5C: Multi-Small Lot Public Information Program	Modest (2)	Modest (2)	Nil
6 - Investigate an Early Stage Incentive Program			
6A: Secondary Suite Incentive Analysis	Modest (1)	Moderate (4)	Moderate (4)
6B: Micro-Entrepreneur Incentive Analysis	Modest (1)	Moderate (4)	Moderate (4)
6C: Small-Lot subdivision Incentive Analysis	Modest (1)	Moderate (4)	Moderate (4)

Modest (1)	Estimated Cost Range
Cost of professional work completed by Town of Bassano and Planning	
Modest (2)	\$2,500 - \$5,000
Cost of professional work completed by External Specialist Consultants	\$5,000 - \$10,000
Moderate (1)	\$5,000 - \$20,000
Cost of professional work completed by Town of Bassano	
Moderate (2)	\$10,000 - \$15,000
Cost of professional work completed by External Specialist Consultants	
Major (3)	Unable to estimate at this time
Cost of Executing the BID Physical Infrastructure	
Moderate (3)	Unable to estimate at this time
Annual Cost of Operating the BID Physical Infrastructure	
Moderate (4)	\$10,000 - \$15,000
Annual Cost of Executing the Incentive Program	

Fig. Public Investment Estimate

Risk and Impact Analysis

The proposed Pocket Lot Renewal strategy is necessarily ambitious and visionary in order to attract the significant and sustained growth in population and economic activity required to unlock the residential housing market and meet the town's three broad goals of increased quality of life for residents, attracting new residents, and expanding the local economy. There are commensurate financial and reputational risks to the Town of Bassano with the proposed strategy. Fortunately, these risks are relatively low for most of the tactics.

Although the public investment estimated in the previous section to execute all of the tactics except for the actual construction of the Bassano Innovation District is not insignificant, the worst case of scenario of receiving no benefit from a moderate in internal and external consulting work would not be disastrous, particularly if some portion of these costs can be covered by external grants. The policy work done revising the *Residential Standards of Development* does not expire and the new policies are available for use at any point in the future.

Executing the construction of the BID is much more costly and the financial risk is much greater. There may be opportunities to reduce the Town's exposure through economic development grants. However, evaluating the likelihood of external funding is beyond the scope of this report. Careful and considered planning and consultation in Tactic Four should help mitigate these risks. There is also a reputational risk should the Pocket Lot Renewal strategy be promoted widely and then fail to deliver on its brand promise. The impact of this perceptual risk to the town's reputation is hard to quantify. However, when compared to the current economic situation in Bassano, it is anticipated that the reputational risk should not be a deterrent to undertaking the strategy. On the flip side, the potential impact of the six tactics on the Town's three key goals is substantial. If the tactics perform as expected, almost all will have a moderate to major impact over the long-term, particularly with respect to economic growth. There are also potentially moderate short-term advantages to be accrued with the increased opportunities for home-based business, the Bassano Innovation District, and the early state incentive program. In summary, the potential impact of the Strategy outweighs the potential reputational and financial risks.

Tactics	Risk	Impact on Current Residents		Impact on Attracting Newcomers		Impact on Economic Growth	
		Short Term	Long Term	Short Term	Long Term	Short Term	Long Term
1 - Increase Opportunities for Secondary Suites	Modest	Modest	Modest	Moderate	Moderate	Modest	Moderate
2 - Increase Opportunitites for Home-Based Businesses	Modest	Moderate	Major	Modest	Major	Moderate	Major
3 - Create a Small Lot Subdivision Program	Modest	Modest	Major	Modest	Major	Modest	Major
4 - Create the Bassano Innovation District	Major	Modest	Major	Moderate	Major	Moderate	Major
5 - Create a Larger Scale Small Lot Renewal Program	Modest	Modest	Major	Modest	Moderate	Modest	Major
6 - Investigate An Early Stage Incentive Program	Moderate	Moderate	Modest	Moderate	Modest	Moderate	Modest

Fig 8. Risk versus Impact Evaluation

Tactics and Target Market Persona Analysis

The Target Market Initiator Analysis identifies which multigenerational personas are most likely to initiate or undertake pocket lot renewal projects that are facilitated by the first five tactics. As expected, the Investor persona figures most prominently, identified as a primary actor in 4 of these 5 tactics.

Tactics	Personas as Initiators of Renewal Projects				
	Investor	Micro Entrepreneur	Landowner	Newcomer	Bassanian
1 - Increase Opportunities for Secondary Suites	Primary		Primary	Secondary	
2 - Increase Opportunitites for Home-Based Businesses		Primary		Secondary	
3 - Create a Small Lot Subdivision Program	Primary		Primary	Secondary	
4 - Create the Bassano Innovation District	Primary		Secondary	Secondary	
5 - Create a Larger Scale Small Lot Renewal Program	Primary				
6 - Investigate An Early Stage Incentive Program	Secondary	Primary	Primary		

Fig 9. Target Market Initiator Analysis

Landowners are anticipated to be primary initiators of two of the six tactics and secondary in another. It is also noteworthy that the Newcomer is a secondary player in four of the six tactics because it is anticipated that resident investment will most likely occur only after momentum has been built by local residents.

In the long term, Newcomer project initiation in both residential property and micro-entrepreneurial start-ups is anticipated to eclipse local investment and be a primary driver of future prosperity and long-term success for the Pocket Lot Renewal Program. This suggests that it is most critical to engage Investors and Landowners early in the process and adjust the detailed execution of the tactics in order to attract their attention and induce them to participate. These adjustments should also be attractive to Newcomer Investors and Landowners when the time is right.

Micro-Entrepreneurs and Newcomers are less critical in the early stages of the strategy as initiators of renewal projects. Although current residents of Bassano who do not fit within one of the other personas are not actively engaged in the initiation phase, it is critical that sufficient attention is paid early in the project to ensure broad community support for the Strategy. The incentive program described in Tactic 6 would probably most impact the Micro-Entrepreneur and Landowner personas with a secondary impact on Investors.

Tactics	Personas as Potential Customers of Renewal Projects				
	Investor	Micro Entrepreneur	Landowner	Newcomer	Bassanian
1 - Increase Opportunities for Secondary Suites				Primary	
2 - Increase Opportunitites for Home-Based Businesses				Primary	Secondary
3 - Create a Small Lot Subdivision Program				Primary	
4 - Create the Bassano Innovation District		Primary		Primary	Secondary
5 - Create a Larger Scale Small Lot Renewal Program				Primary	
6 - Investigate An Early Stage Incentive Program		Primary		Primary	

Fig 10. Target Market Customer Analysis

The Target Market Customer Analysis reveals that Newcomers and Micro-Entrepreneurs are most likely to be interested and able to participate as customers of the Pocket Lot Renewal initiatives. It is anticipated that local Bassano residents will be involved in a secondary manner in two tactics. This analysis suggests that particular attention should be paid to Newcomers at the outset of the project, but only after there are some tangible offerings such as secondary suite rentals, new home-based business offerings, and pocket lot subdivided lots to purchase for them to engage with. The growing support of Newcomers, as new residents and users of new products and services, is critical to the success of this strategy and an aggressive communication plan is required to capture their attention.

PART 2 – Intergenerational Age-in-Place Housing Strategy Business Case

In phase one of this report, three potential strategies were identified for intergenerational housing in Bassano - Tiny House Development, Age-in-Place Secondary Suites, and an Age-in-Place Village.

Following an evaluation of the three strategies it was determined that the Age-in-Place Secondary Suite and Village options were the most promising approach for an intergenerational housing project in Bassano.

Summary of Phase One Findings

The Age-in-Place Secondary Suite strategy

The Age-in-Place Secondary Suite strategy is based on a portable dwelling unit with advanced design features to support age-in-place living that has been developed as part of a research project at the University of Calgary. The 53 sqm (570 sqft) 1-bedroom residence is specifically designed to help frail seniors live independently, and safely, for an extended period. It is a prefabricated portable unit with a mass customized modular interior and comprehensive digital infrastructure. Both the physical and digital environments can be adapted to meet the specific health profile of the resident at the time of initial move-in and as their needs evolve. The house provides these high levels of support within a well- designed domestic environment that looks and feels like home. The age-in-place living unit is designed to be temporarily located in the backyard of a property owned by a frail senior, a family member, or a friend. An above ground utility umbilical cord temporarily connects into the host structure for water, gas, electricity, and sewage service.

The unit provides advanced levels of support to allow frail individuals to continue living in their own community close to family and friends for a longer time, with a higher quality of life, an increased feeling of independence and agency, and with less burden on family members and other caregivers.

The Age-In-Place Secondary Suite strategy could use a land-use instrument such as a temporary use permit to have these specialized living units deployed on an as-needed basis onto existing residential lots. The units would be removed when the senior resident no longer required its use. This strategy would require changes to the land use bylaw to permit 'portable medical units' to be temporarily placed on a property as a secondary suite. The municipality, or other public entity, would enter a multi-year lease for a small fleet of these living units and manage their deployment within Bassano and the larger region.

This strategy offers several opportunities. First, the living unit provides a safe and technically sophisticated living environment that allows seniors to remain living independently while managing increasing physical and cognitive challenges. Second, the portable deployment strategy sustains the existing community by helping seniors to remain living close to their original home or the home of a family member or friend. This helps to maintain long-time familial and community-based relationships and facilitates the capacity for increased levels of informal care and support.

Third, the strategy provides a mechanism for ensuring that the supply of intergenerational housing options can continuously adjust to match a demand that naturally fluctuates not only in location but also over time. Fourth, the leasing model eliminates the up-front cost to the municipality, as well as the senior and their family, of purchasing or building a medically sophisticated living unit. Fourth, the lease agreement for the unit includes the cost of continuously evergreening the architectural and digital technology to ensure that all units remain on the cutting-edge of assistive support. Finally, it eliminates the long-term financial risk to the municipality of owning an intergenerational housing project. This is particularly important given the unknown long-term demand for intergenerational housing in Bassano.³

³ Brown, John. Inter-generational and Multi-generational Tiny Home Pilot Project Bassano, Phase One: Feasibility Analysis, Oct 29, 2019, pp. 24-26.

The Age-in-Place Village strategy

The Age-in-Place Village strategy is a variation of the previous strategy. It uses the same specialized age-in-place living units and organizes them in a small cluster around a communal raised deck with a common entry stair, ramp, and wheelchair lift. The result is a semi-permanent intergenerational village that can be sized to fit the demand for seniors housing in the municipality and shaped to fit the geometry of an available piece of property.

It is anticipated that villages would be comprised of between five and twenty units. Depending on the needs of the municipality, the village could also include community support modules such as a café, community hall, or wellness centre. The wellness module could contain spaces for hair and nail care, massage therapy, and group fitness activities. The municipality or other public agency would lease the living units and either fund or finance the construction of the community support modules, communal deck, utility servicing and any site improvements. Seniors would rent the units from the municipality or public agency on a monthly basis. The commercial activities in the community modules could be operated by the municipality or leased to outside operators.

In addition to the advantages outlined in scenario two, the Age-In-Place Village offers additional opportunities and advantages. First, the group setting provides seniors with a ready-made social structure that reduces isolation while still maintaining the individual's ability to live in their own freestanding residence. The communal deck provides a safe and secure external space that connects into the local neighborhood.

The digital support infrastructure in each home also connects the individual units in the village together and reduces social isolation, even during inclement weather. Second, the addition of community modules into the village provides additional support services to residents such as meals, social activities, and personal care. This could potentially allow the village to provide a more comprehensive and higher level of service support that could equal that found in a traditional lodge.

There is the potential for this innovative option to garner support from the Provincial Government if it can be demonstrated that this option delivers equivalent services without the upfront development cost of a bricks and mortar care facility. The advantage of the Village model is that the residents could take advantage of these services while still enjoying the independence and agency of living in their own single-family home. Additionally, and unlike a conventional senior's facility, the village design allows these amenities to also serve the broader community, thereby providing community amenities that would not be financially feasible without the guaranteed use by the residents of the village. Alternatively, the municipality might enlist existing businesses to provide these support services on a contract basis, providing them with an economic boost through an assured income stream.

This potential for seniors to maintain enhanced levels of independence and agency even as they require higher levels of support is a major innovation in senior's housing that addresses the major concern that most seniors have about institutionalized living. There is also a potential that the Age-in-Place Village could provide a potential cost saving to the Province while better meeting the needs of an aging population. Bassano would benefit from the media attention from being the site of the first such development in the world.⁴

For the purposes of Phase 2, these two housing strategies are integrated into a single Age-Friendly Community strategy that better aligns with the aspirational nature of the Pocket Lot Renewal Strategy. The two housing solutions identified in Phase 1 focus exclusively on the project's first goal of better meeting the needs of current residents. By placing them within a more comprehensive Age-Friendly Community framework, the intergenerational housing dimension of the project can also better address the other two goals of attracting new residents to the municipality and improving the local economy.

⁴ Brown, John. Inter-generational and Multi-generational Tiny Home Pilot Project Bassano, Phase One: Feasibility Analysis, Oct 29, 2019, pp. 26-28.

Age-Friendly Community

An Age-Friendly Community is defined by the World Health Organization (WHO) as a town or city where all people have lifelong opportunities to thrive. It is a place where policies and services exist to enable older adults to remain full and meaningful participants in their community.

Older people face increasing challenges due to the sensory and other changes that age brings. In an age-friendly community, policies, services and structures related to the physical and social environment are designed to support and enable older people to “age actively” – that is, to live in security, enjoy good health and continue to participate fully in society. Public and commercial settings and services are made accessible to accommodate varying levels of ability. Age-friendly service providers, public officials, community leaders, faith leaders and business-people: 1) recognize the great diversity among older persons; 2) promote their inclusion and contribution in all areas of community life; 3) respect their decisions and lifestyle choices, and 4) anticipate and respond flexibly to aging-related needs and preferences.⁵

The WHO identifies three key components of an Age-Friendly Community – Participation, Health and Security, and Independence as outlined in the following table. These three components frame the tactics for the intergenerational business case.

Key Components of an Age-Friendly Community

Participation

- Positive images of older persons
- Accessible and useful information
- Accessible public and private transportation
- Inclusive opportunities for civic, cultural, educational and voluntary engagement
- Barrier-free and enabling interior and exterior spaces

Health

- Places and programs for active leisure and socialization
- Activities, programs and information to promote health, social and spiritual well-being

⁵ https://www.who.int/ageing/projects/age_friendly_cities/en/

Social support and outreach
Accessible and appropriate health services
Good air/water quality

Security and independence

Appropriate, accessible, affordable housing
Accessible home-safety designs and products
Hazard-free streets and buildings
Safe roadways and signage for drivers and pedestrians
Safe, accessible and affordable public transportation
Services to assist with household chores and home maintenance
Supports for caregivers
Accessible stores, banks and professional services
Supportive neighbourhoods
Safety from abuse and criminal victimization
Public information and appropriate training
Emergency plans and disaster recovery
Appropriate and accessible employment opportunities
Flexible work practices⁶

WHO Global Network for Age-Friendly Cities and Communities

By adopting this framework to guide the Intergenerational Housing Strategy, Bassano is eligible to join a growing number of municipalities in Canada and around the world who are members of the WHO Global Network for Age-Friendly Cities and Communities. This Network helps municipalities to better meet the needs of their older residents.

The WHO Global Network for Age-friendly Cities and Communities (the Network) was established to foster the exchange of experience and mutual learning between cities and communities worldwide. Cities and communities in the Network are of different sizes and are in different parts of the world. Their efforts to become more age-friendly take place within very diverse cultural and socio-economic contexts. What all members of the Network do have in common is the desire and commitment to promote healthy and active ageing and a good quality of life for their older residents.⁷

⁶ https://www.who.int/ageing/projects/age_friendly_cities/en/

⁷ https://www.who.int/ageing/projects/age_friendly_cities_network/en/

Joining the WHO Global Network is a public declaration of Bassano's intention to expand its emergent Innovation brand to include new ways of healthy aging and can be a potentially important symbolic component of its emerging value proposition.

Age-Friendly Community Tactics

The intergenerational business case positions Bassano as the best place for seniors to live in Southern Alberta. The tactics to realize this vision align with the WHO's Age-Friendly initiatives global network and build upon the many benefits of living in Bassano (safety, friendly small-town community spirit, good local healthcare, and an affordable cost of living) with a compelling set of enhanced community resources, and advanced housing options that help seniors continue living well and independently for extended periods of time.

The six Age-Friendly Community tactics create a strong competitive advantage for Bassano that will potentially attract older adult newcomers to relocate to Bassano while at the same time improving the quality of life for current senior residents. It is also possible that this comprehensive initiative will help kickstart the Bassano Project and its mandate to realize a new facility that integrates a new hospital with a spectrum of senior's living options including long term care, supported living, and independent senior's housing facilities.

The Age-Friendly Community tactics also have the potential to amplify the economic growth agenda of the Pocket Lot Renewal strategy by attracting new senior residents from the surrounding area. Creating an Age-Friendly environment is a dynamic strategy for a small town to undertake and is consistent with the Innovation dimension of the multigenerational strategy. Wherever possible the Pocket Lot Renewal and Age-Friendly Community strategies should be coordinated and well integrated to leverage resources, opportunities, and impact.

Tactic 1 – Initiate Age-Friendly Municipal Policies

The first proposed Age-Friendly tactic recasts various components of Bassano’s municipal policy to ensure that seniors are enabled and empowered to live well in the community. Some of these are new policies while others involve minor adjustments to, or an expansion of, existing policies. This tactic is relatively easy for the town to implement, involves a modest public investment, and has a modest risk. Unfortunately, there is also a relatively long-time frame before the impact of these new policies are manifested in the built environment. However, a demonstration of this potential impact could be kickstarted by implementing these policies in the Bassano Innovation District and Innovation Alley. This would involve a moderate cost.

This tactic will probably have a correspondingly modest impact on economic growth, and a modest to moderate impact on current residents and newcomers, particularly in the long term. As a comprehensive approach that addresses the entire town, it is an important signal of Bassano’s intention to create a fulfilling and vibrant community for seniors.

Tactic 1A: Develop age-friendly municipal policies that guide the development of:

- barrier-free and hazard-free sidewalks, parks, and streets
- age-friendly signage for drivers and pedestrians
- emergency plans and disaster recovery tailored to older adults
- inclusive opportunities for civic, cultural, educational and voluntary engagement

Tactic 1B: Develop age-friendly policies that encourage new and existing businesses to:

- incorporate age-friendly design features as well as offering senior-oriented products and services
- provide accessible stores, banks and professional services
- create appropriate and accessible employment opportunities for older adults

Tactic 1C: Pilot the early-stage implementation of a select number of these policies within the Bassano Innovation District. Focus on policies that deliver the most tangible, visible, and functional impacts on the public realm in the Bassano Innovation District.

Tactic 2 – Expand Age-Friendly Community Services

The second Age-Friendly tactic proposes to expand the scope and quality of community services for Bassano seniors. This tactic addresses the WHO's Age-Friendly guideline to increase the participation of older adults in community activities and to help ensure their security and independence. The tactic builds on existing programs and services currently offered by volunteers, FCSS, and the Pioneer Damsiters. It also fills in identified gaps with new offerings to create a well-rounded and fulsome set of activities and services.

The public investment for this tactic is modest and has a modest risk because it relies on leveraging existing service providers and volunteers and helps them be more effective. There is a potentially moderate impact in the short and major impact in the long term on both the quality of life for current older residents as well as attracting senior newcomers to move to Bassano.

The tactic helps ensure that the town has a strong and compelling suite of senior-oriented programs and services including:

- places and programs for active leisure and socialization
- activities, programs and information to promote health, social and spiritual well-being
- social support and outreach
- safe, accessible and affordable public transportation
- services to assist with household chores and home maintenance
- supports for caregivers

Some of these programs and services are already in place through the Volunteer Drive Program, Meals on Wheels, and a regional bus service that takes seniors to appointments and groceries in surrounding cities. FCSS provides, on average, one senior program or activity per month and the Senior's Drop-in Centre (Pioneer Damsiters) also has regularly scheduled social events. In addition to tweaking and in some cases expanding these existing services, other programming will be added by working with partner organizations and volunteers.

Tactic 2A: Work with the Pioneer Damsiters and the local senior community to create a motivated and committed Senior’s Action Team that provides guidance to the town and helps execute the activities in this tactic.

Tactic 2B: Create an inventory of current programs and services. Identify gaps in quality and level of service in collaboration with the Senior’s Action Team and a broader community outreach process.

Tactic 2C: Work with local volunteers and service provides to develop innovative strategies for improving the quality and scope of senior programming in Bassano.

Tactic 3 – Implement an Age-in-Place Village Pilot Project

The third Age-Friendly tactic proposes a pilot project to implement a small-scale Age-in-Place Village using the advanced modular housing units described in Phase 1. This tactic addresses the WHO’s Age-Friendly Community guideline for providing appropriate, accessible, affordable housing and accessible home-safety designs and products. This tactic is moderately easy for the Town to implement and has a moderate long-term risk due to the fact that the public investment is minimized because of the portable nature of the Village and the option for the town to lease the living units on a 5 year renewable term. There is a short-term risk of financial cost to the town if the units are vacant and a strong marketing program is required to ensure that vacancies are minimized.

The short- and long-term impact of this tactic is potentially very high. If the prototype Village is the first example of this innovative housing solution in the world, it has the potential to generate considerable media attention. It has a strong potential to attract seniors from Newell County and beyond to move to Bassano as well as helping to alleviate some of the local demand for an independent living option that incorporates elevated level of support (an option between fully independent living and the Playfair Lodge).

There is also the potential for an effective synergy between this pilot project installation and the multigenerational tactic of establishing the Bassano Innovation District. Although careful consideration

needs to be given to the location of the Village in relationship to the Newell Foundation's facilities, there are considerable benefits if it is located inside the BID. It would be a highly visible indication of the Town's intention towards fostering innovation in age-friendly housing to both Bassano residents and potential newcomers. The Village should be located on a site that allows future expansion in the number of living units in order to meet an increase in demand that exceeds initial expectations. It should also be designed so that the Village can be disassembled, and the units relocated for integration into the Bassano Project.

In the short term the Village will be operated as a user-pay independent living option. The public investment is anticipated to be modest if the financial operating model for the Village allows most of the development costs to be incorporated into the rental rates for the users. If this is not possible, the public investment required for this tactic may increase. This cost sensitivity requires considerable care in developing the detailed implementation plan that will form the central part of Phase 3 of this report. It is also anticipated that the pilot program will expand to include a test of providing higher levels of support services (meals, laundry, and housekeeping) still within a user-pay model. This could expand to include a pilot of SL1, SL2, and eventually even SL3 levels of care and an evaluation of the potential for the Village to be eligible to support low-income seniors through Provincial financial assistance programs.

Tactic 3A: Develop a Village configuration that addresses an appropriate range of needs and financial capacity. Develop a detailed budget for the initial deployment and ongoing operation of the Village that addresses this range of needs and identify the financial impact of any required rental supplements. Identify the size and potential location of the pilot project and develop an operational framework for managing the day-to-day functioning of the Village.

Tactic 3B: Complete the concept design and detailed cost estimate for the pilot project. This includes short- and medium-term service support offerings such as meals, laundry, and housekeeping.

Tactic 3C: Build support and awareness of the pilot project both locally and regionally prior to deployment to help ensure the project is fully occupied upon launch.

Tactic 4: Relocate the existing senior's drop-in centre to a new Clubhouse

The fourth tactic proposes to relocate the senior's drop-in centre, currently located in an old commercial space attached to the municipal garage, to a new facility that is integrated into the Age-In-Place Village pilot project. The new space is custom designed as a senior's Clubhouse to accommodate a wider variety of informal and formal programs and services. It is a focal point for all Bassano seniors and easily accessible by Village residents to help reduce social isolation.

Integrating the Clubhouse into the Village pilot project should require a modest public investment and a moderate risk if most of the costs could be integrated into the project lease. The impact of this tactic, over the short and long term is potentially high as it is a very visible manifestation of the town's commitment to be an Innovative Age-Friendly Community. It provides a tangible benefit to all Bassano seniors and is potentially a strong attractor for older adults thinking about relocating to Bassano, either as residents of the Village or as buyers of an existing home.

Tactic 4A: Engage the Senior Action Team to determine the functional programming requirements for the Clubhouse.

Tactic 4B: Develop a concept design and detailed pricing for the Clubhouse and how it benefits Bassano seniors as well as Village residents.

Tactic 4C: Build an age-friendly online directory of Clubhouse programs and services as an information resource for local seniors and to attract senior newcomers to Bassano.

Tactic 5: Develop an Age-in-Place Secondary Suite Pilot Program

The fifth tactic provides an additional housing option for Bassano seniors requiring an elevated level of support in order to continue living independently. It is geared towards landowners who have family members or friends that require additional living support. The Town would lease a small number of modular housing units as a Secondary Suite pilot project and then rent them out to local landowners as a temporary secondary suite on their property.

The landowner would pay for the cost of transportation and set up. When the unit is no longer needed, the unit would be redeployed to another piece of property.

The public investment for this tactic is modest. The long-term risk is moderate because the units are leased and can be returned at the end of the pilot. The risks are higher than the Village pilot project because the secondary suite option requires the additional step of qualifying the land for a secondary suite land use and the additional upfront costs to the landowner of transport and setup, There is also the financial risk of vacant units, particularly if the approval process for secondary suite usage lengthens the time between deployments. The potential short-and-long term impact of the secondary suite option is also lower than the Village because it is geared towards a smaller and more restrictive subset of potential users, namely current Bassano landowners with an older family member, a piece of property that can accommodate a secondary suite, and the financial means to pay for the transportation and set up costs. Careful consideration is needed to determine when is the most optimal time within the overall strategy to initiate this tactic.

Tactic 5A: Analyze the potential market for this housing solution based on a review of how many properties in Bassano can accommodate one of the modular secondary suites and public consultation to gauge potential demand. Develop a detailed budget for deployment and operation of a secondary suite rental pool.

Tactic 5B: Develop an operational framework for managing the deployment of the units.

Tactic 5C: Complete the concept design of a test-case deployment and detailed cost estimate for the pilot project. This includes the transportation and setup costs that are the responsibility of the landowner.

Tactic 5D: Build support and awareness of the secondary suite pilot project prior to deployment to help ensure the portable units are committed for deployment upon the launch of the program.

Tactic 6: Develop a comprehensive communication program of Bassano’s Age-Friendly Strategy

The sixth tactic creates a compelling, comprehensive, and well-designed public facing description of the Age-Friendly Community initiatives. This includes the policies that the town has implemented and the enhanced programs and services available to seniors. It also includes a description of the Village and Clubhouse as well as the Secondary Suite option.

Consistent with the WHO framework, the communication program reinforces positive images of older persons and the unique benefits they bring to a community. It serves existing residents by offering a one-stop shop information resource for the programs, services, and other resources for Bassano seniors. It also serves to market Bassano to potential new residents as the best place for seniors to live in Southern Alberta. The communication should mimic in style the information provided for the multigenerational strategy and should be well integrated and prominently featured in all Town of Bassano-based media.

This tactic has a moderate public investment and a moderate risk. It is anticipated to have a modest impact on Bassano seniors. As a marketing tool to publicize the age-friendly benefits of the Town it has a major impact on attracting newcomers and a moderate impact on economic growth.

Intergenerational Target Market Considerations

There are five primary target market personas for the Age-Friendly Community Strategy – The Bassano Pioneer, the Newcomer Pioneer, the Person with Disabilities, the Engaged Family, and the Absentee Family.

The Bassano Pioneer

The Bassano Pioneer is an individual or couple who are over the age of 70 and live in Bassano. They are most likely long-time landowners. As identified in phase one of this report, many of these individuals will be caught between a desire, and near-future need, to move into a more senior-friendly living environment and the economic constraint of having a significant amount of equity tied up in a property

that has declined in value and is difficult to sell. This persona is looking for a set of physical and community supports that can help them to extend their ability to live independently before moving into a formal assisted living situation such as Playfair Lodge or, the Village, if and when the Village achieves an SL3 designation.

While some individuals in this group are able to financially afford to rent one of the specially designed age-in-place living unit (as either a secondary suite or village), most will need to sell their current property before this can happen or rely on some kind of financial assistance in the interim to afford the Village rental costs. This persona values the enhanced Age-Friendly community programs and services and is likely to be an active participant in Clubhouse activities.

Meeting this persona's needs is the driving force for the Bassano Intergenerational Housing Project. However, given the economic constraints facing this group, an innovative approach for meeting these needs is required that leverages the financial capacity of other personas to make the deployment and operation of the Village and Clubhouse tactics financially feasible for the town to undertake.

The Pioneer Newcomer

The Pioneer Newcomer is an individual or couple over the age of seventy who resides in Newell County or beyond and would consider relocating to live in the Village pilot project and can afford to pay the full rental cost for the housing unit. The decision to relocate will also be affected by the quality of the Age-Friendly programs and services on offer in Bassano. It is also possible that a Pioneer Newcomer might purchase a property as an investment, lease an age-friendly secondary suite unit to live in on the property, and rent out the original house for a revenue stream. However, at the outset at least given the potential media attention anticipated for the Age-in-Place Village prototype, it is probably more likely that these individuals would choose to take up residency in a Village unit.

The financial capacity of this group reduces the risk of deploying the Village and Clubhouse projects. With a to-be-determined number of units occupied by full-paying Pioneer Newcomers, the Town will be

able to open the Clubhouse facility as a benefit to all Bassano seniors. A smaller number of units could potentially be set aside to accommodate low-income Bassano seniors who require financial assistance from some external source to offset the rental costs.

The Person with Disabilities

The Person with Disabilities persona consists of people, at any age, who by reason of disease, trauma, or other affliction are unable to live independently. This includes adult children with autism, individuals with spinal cord injuries from an accident, people with degenerative neuro-muscular diseases, and those with long term disability resulting from a major health event such as a stroke. This persona may consist of Bassano residents but more likely involves individuals living in the larger region who are unable to find an appropriate housing option outside of the big cities. This persona may or may not have, on their own, the financial resources to pay the full rent of the unit but are probably eligible for other government assistance that will supplement their financial capacity. Like the Newcomer Pioneer, this persona could choose to live in the Village or in a secondary suite unit temporarily deployed on a piece of property that is either purchased by the person with disabilities or owned by a friend or family member. It is also possible that these individuals could also be part of an Engaged Family persona who all choose to relocate to Bassano in order to be close to the family member requiring additional support to live independently.

The Engaged Family

The Engaged Family persona is a multigenerational family unit with either aging parents or a person with disabilities and are interested in relocating, as a group, to accommodate a higher level of supportive independent living. Although this is not probably a large target market, it does offer an interesting opportunity for the town because it would probably include the purchase of a home and the rental of an Age Friendly secondary suite housing unit. For younger persons with disabilities, this could be a long-term rental proposition.

The Engaged Family persona could purchase a property and install a secondary suite for their loved ones. Alternatively, the family could purchase or rent a home that does not qualify for a secondary suite and arrange for the older family member to live in the Village.

It is also possible that this persona could consist of a group of long-time friends, or even relative strangers who want to live near each other because of a common interest or hobby. It is significant to note that groups like this are forming small senior-oriented intentional communities in rural Australia and the United States. There is the potential for significant synergies between the needs and desires of these intentional groups and the broader micro-entrepreneurial interests driving the Pocket Lot Renewal strategy. Bassano has the potential to be a compelling option for a small intentional community that includes seniors looking to establish themselves in small-scale business ventures as well as living near each other.

The Absentee Family

The Absentee Family is a secondary persona within the target market. This group is comprised of family members who do not live in proximity to their aging parents. This could be someplace as close as Calgary or as far away as anywhere else in the world. This group is identified as a target market because there is the potential for them to provide supplementary funding to offset some of the rental cost for the Village.

This persona probably values, and may be willing to financially support, the peace of mind that comes from knowing your aging loved ones are in a safe and well-supported environment that includes a strong community, a living unit that can adapt to changing needs, and a digital monitoring system that identifies early warning signs of health challenges. This value is typically intensified for family members who are not able to live close enough to an aging loved one to provide one-on-one informal care and support.

There is also the potential that younger Absentee Family members could play a role in passively promoting Bassano and the Age-in-Place village to their older parents and grandparents because they may more readily the promotional material and media coverage of the age-in-place Village on their social media feeds and suggest it as an option to their older family members.

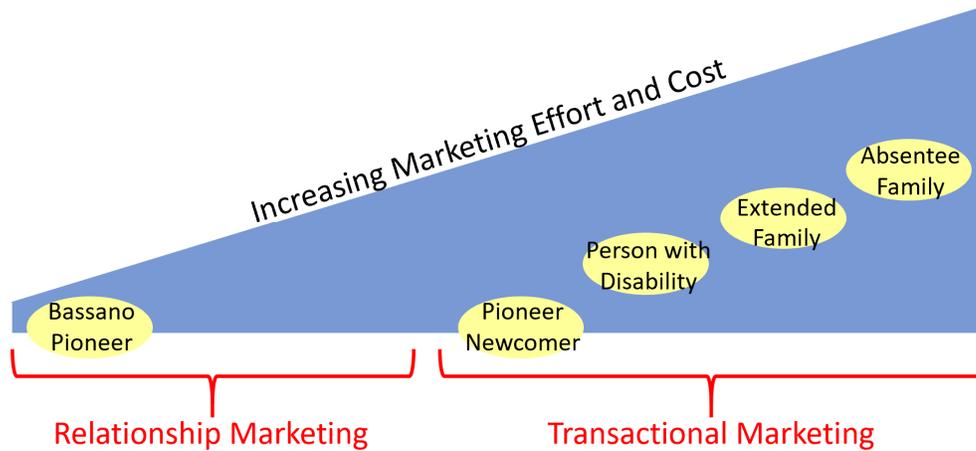


Fig 12: Age-Friendly Community Persona

Mapping these five personas against the relationship marketing spectrum reveals that the Bassano Pioneer is on the left side of the spectrum and the Pioneer Newcomer is closer to the middle. The Person with Disabilities, the Engaged Family, and the Absentee Family are on the right side of the spectrum. This is consistent with a similar analysis in the multigenerational section. However, unlike the multigenerational strategy, the strategic importance of attracting intergenerational newcomers who have the financial capacity to live in the village without financial assistance indicates that the initial marketing push should include a strong focus on these external groups.

This is consistent with the fact that, unlike the Pocket Lot Renewal strategy, the Village and the enhanced age-friendly services in the Clubhouse, are unique and powerful attractors to the town for the intergenerational personas. It is anticipated that the Village and the Clubhouse will generate considerable press and social media coverage that should reach all the external persona.

Analysis of Multigenerational Project Business Case

This section provides a high-level summary of the preliminary cost estimates, potential risks and impacts, and anticipated target market uptake for executing the six tactics identified in the Age-Friendly Community strategy. The analysis is presented in graphic form in keeping with the preliminary nature of the analysis and to highlight the relationships between the various tactics in the strategy.

Public Investment Analysis

The public investment required to initiate most of the tactical components of the Age-Friendly Community Strategy is not expected to be large. However, like the Pocket Lot Renewal analysis, there are too many unknowns at this stage of the project to provide a detailed estimate of these costs.

Most of the sub-activities in Tactics 1 and 2 are modest in cost because they involve the development of planning and policies by the Town of Bassano and its contract planning consultant. The major investment requirement noted for the implementation cost of 1C: piloting selected Age-Friendly Policies in the Bassano Innovation District, assumes that this will involve upgrading to streetscape standards and signage to become more amenable to older adults. Compared to the overall cost of constructing the BID, these elements are probably relatively minor in cost, particularly if the work can be included in the overall BID project.

Similarly, the public investment required for all the preparatory work required in Tactics 3, 4, and 5 also relies on professional work by the Town of Bassano, its contract planning consultant, and external specialist consultants and should be modest in cost. The moderate costs for an external consultant in Tactic 6 are due to the scope of work required and the need to create very complete and professional marketing materials and a strong communication program to publicize the Village, Clubhouse, and Secondary Suite opportunities to potential Pioneer Newcomers.

Tactics	Public Investment Requirements		
	Initial Cost	Implementation Cost	Ongoing Cost
1 - Initiate Age-Friendly Policies			
1A: Age Friendly Municipal Policies	Modest (1)	Modest (1)	Nil
1B: Age-Friendly Business Policies	Modest (1)	Modest (1)	Nil
1C: Pilot Select Age-Friendly Policies in the BID	Modest (1)	Major (1)	Modest (1)
2 - Expand Age-Friendly Community Services			
2A: Senior's Action Team	Modest (1)	Modest (1)	Nil
2B: inventory of Current Programs and Services	Modest (1)	Modest (1)	Nil
2C: Improve quality and scope of programming	Modest (1)	Modest (1)	Modest (1)
3 - Implement Age-Friendly Village Pilot Project			
3A: Needs assessment and financial model	Modest (2)	Modest (2)	Nil
3B: Concept Design and Detailed Cost Estimate	Modest (2)	Modest (2)	Nil
3C: Build Support for, and Awareness of, Village Pilot	Modest (1)	Moderate (1)	Modest (1)
4 - Relocate Drop-in Center to New Clubhouse			
4A: Needs Assessment and Functional Programming	Modest (1)	Modest (1)	Nil
4B: Concept Design and Detailed Cost Estimate	Modest (2)	Modest (2)	Nil
4C: Age-Friendly Directory of Clubhouse Programs	Modest (1)	Modest (1)	Modest (1)
5 - Develop Age-in-Place Secondary Suite Pilot Project			
5A: Potential Market and Capacity Analysis	Modest (1)	Modest (1)	Nil
5B: Operational Framework to Manage the Units	Modest (1)	Modest (1)	Modest (1)
5C: Concept Design and Detailed Cost Estimate	Modest (2)	Modest (2)	Nil
5D: Build Support for, and Awareness of, Sec. Suite Pilot	Modest (1)	Modest (1)	Modest (1)
6 - Develop Comprehensive Communication Plan			
6A: Communication Program for Age-Friendly Strategy	Moderate (2)	Moderate (2)	Modest (1)
Modest (1)	Estimated Cost Range		
Cost of work completed by Town of Bassano and Planning Consultant	\$2,500 - \$5,000		
Modest (2)			
Cost of work completed by External Specialist Consultants	\$5,000 - \$10,000		
Moderate (1)			
Cost of work completed by Town of Bassano and Planning Consultant	\$5,000 - \$20,000		
Moderate (2)			
Cost of work completed by External Specialist Consultants	\$10,000 - \$15,000		
Major (1)			
Cost of Executing Pilot Implementation of Policies	Unable to estimate		

Fig 13: Age-Friendly Community Public Investment Estimate

The cost of constructing and operating the Village pilot project, the new Clubhouse, and the Secondary Suite Pilot Project are not included in this analysis. Further details about the scope and scale of these projects is required to complete an estimate of the required public investment. However, the following section outlines the operational and financial strategy underlying the FAB Platform business model of leasing portable age-in-place residential units to municipalities and housing societies.

The FAB Platform

If the Village Pilot Project, the new Clubhouse, and Secondary Suite Pilot Program were delivered through a conventional bricks-and-mortar design and construction process the required financial investment for the town would be very high and would most likely make these projects unfeasible.

The FAB Platform of leasing premanufactured portable units minimizes up-front public investment and helps to make these kinds of capital projects possible for small towns to afford. The subscription format of the lease also provides for continuous evergreening of the physical and digital infrastructure in the units so that they remain up to date with the latest developments in senior's assistive technology.

The specialized age-in-place living units are provided to a municipality or housing society on a monthly subscription lease basis. The municipality or society then rents these units out to older adults. In the optimal scenario, the rent from the resident covers the cost of the lease as well as operating costs (utilities, snow removal, etc.). Although FAB has not finalized the pricing structure for the lease, the current estimate for the 580 sqft one-bedroom unit is \$2,300 per month. Two smaller units (480 and 380 sqft) are currently being designed to provide lower lease cost options for those municipalities and societies with substantive low-income populations. It is anticipated that the pricing for these units will be available and can be factored into the Implementation Analysis in Phase 3 of this Report.

For Secondary Suite projects, the only other costs are for transportation and temporary above ground utility hook-up to the donor house. Based on the experience with the prototype testing completed last year in Calgary, it is anticipated that these costs would be in the \$4,000-\$7,500 range. These costs would typically be the responsibility of the landowner/ renter, not the municipality or society. At the completion of the lease there would be another cost of approximately \$1,000- \$1,500 to unhook the utilities from the house, also paid by the landowner.

For a Village project, in addition to the transportation costs and utility hook ups, there are additional costs for building the communal deck, entry stairs and ramp, and any desired landscaping. Depending on

the location and size of the Village, the utility servicing would probably require one underground service connection. These additional costs would typically be paid by the municipality or society up-front as a one-time installation cost. It is anticipated that the FAB Platform will have an option whereby the municipality or society can finance these costs through FAB over a 5-year period. In the best-case scenario, the monthly repayments would be folded into the rental cost to the resident. Early estimates indicate that this would increase the rent for each by approximately \$100- \$150/month.

The Clubhouse could potentially also be designed and deployed as a portable unit. Depending on the required scale and functionality, it would most likely be two units transported separately and joined together on site. This unit could be purchased up-front by the municipality or society or, potentially leased under an agreement similar to the living units. At the discretion of the municipality or society, all or a portion of the monthly lease cost for the Clubhouse could be added into the rental rate for the residents. A cost estimate for this structure will be provided after the scope and scale of the Clubhouse is determined. It is anticipated to be included in Phase 3 of this Report.

As noted above, in the optimal scenario, the municipality or society has no financial investment in the project beyond a 4-month security deposit to FAB (which will be partially offset by the security deposit paid by the renter to the municipality or society). In situations where the Village or secondary suite needs to accommodate low-income seniors, the municipality or society would provide a monthly subsidy that reduces the rental cost to the resident. This subsidy could come from regular operating funds or through fund-raising. The amount of the subsidy and the number of subsidized units can be determined by the municipality or society based on social need and their financial capacity. The FAB Platform anticipates that the subscription lease for the units will have a five-year renewable term. At the conclusion of the lease, the units will be removed by FAB. The cost of restoring the site is the responsibility of the municipality or society.

The FAB Platform replaces the typical project pro-forma of a high up-front capital cost paid through a government grant, public-private partnership, or bank financing with a monthly subscription lease service that covers most if not all of the upfront costs and ensures that the physical and digital supports in the homes are continuously evergreened.

This is a significant opportunity for small municipalities and remote societies who typically have difficulty attracting the government support or private investment needed to realize a senior's living facility. It is the responsibility of the municipality, with support from FAB, to develop a financial model for the project that has sufficient cash flow from the residents to cover all or most of the subscription lease and ensure that any residual monthly costs can be paid through general operating funds or other community-based sources.

In the base scenario outlined above, a FAB Village would be considered a private independent living facility. By supplementing the physical infrastructure of the Village with meals, laundry, and housekeeping services alongside structured homecare, the Village would still be considered a private facility but one that is comparable to a SL1 or SL2 level facility. In this situation, the cost of providing 3 meals/day, weekly laundry service for bedding and towels, and weekly cleaning of the unit would be added to the rent paid by the resident. Adding the provision of unstructured care and evening supervision should elevate the Village to SL3 status. To cost effectively achieve this level of medical service it is anticipated that the Village would need to be located on the grounds of, and in close proximity to, a Lodge or supported living facility that already offers this level of care. The incremental cost for the additional nursing care would be added to the monthly rental cost of the units.

In order for low-income residents to be able to use Provincial Assistance Programs to offset the cost of these higher levels of service the Village would need to be certified as a Lodge and would then fall under the Provincial regulation as a public senior's facility. This would open up the Village living option to low-income seniors. FAB intends to explore the feasibility of achieving this designation within the coming year.

Risk and Impact Analysis

The risks associated with the first two tactics are modest because they involve the development of policy guidelines that will drive future growth and change in Bassano. The implementation of the Village pilot project, the replacement of the Clubhouse, and the secondary suite pilot project have a moderate risk due to the financial exposure if the units are vacant for an extended period of time.

These risks can be mitigated by ensuring that the number of units do not outstrip demand and initiating an aggressive marketing campaign and communication program to attract Pioneer Newcomers to move to Bassano and live in the rental units. As a result, the risk of developing a comprehensive communication plan is also rated as moderate.

Tactics	Risk	Impact on Current Residents		Impact on Attracting Newcomers		Impact on Economic Growth	
		Short Term	Long Term	Short Term	Long Term	Short Term	Long Term
1 - Initiate Age-Friendly Policies	Modest	Modest	Major	Moderate	Major	Modest	Modest
2 - Expand Age-Friendly Community Services	Modest	Moderate	Major	Moderate	Major	Modest	Modest
3 - Implement Age-in-Place Village Pilot Project	Moderate	Moderate	Major	Major	Major	Moderate	Major
4 - Replace Drop-in Center with New Clubhouse	Moderate	Major	Major	Major	Major	Moderate	Major
5 - Develop Age-in-Place Secondary Suite Pilot Project	Moderate	Moderate	Moderate	Major	Major	Moderate	Major
6 - Develop Comprehensive Communication Plan	Moderate	Modest	Modest	Major	Major	Moderate	Moderate

Fig 14: Age-Friendly Community Risk and Impact Evaluation

In the short term, the introduction of the Age-Friendly Policies will have a modest impact on current residents, a moderate impact on attracting newcomers to Bassano, and a modest impact on economic growth. In the long term, the impact on both current residents and newcomers is expected to be major. Expanding age-friendly community services has a significant impact on residents and newcomers but only modestly affects economic growth.

The Village and the Secondary Suite pilot projects are expected to have a moderate impact on Bassano residents in the short term because of the rental costs for the initial deployment of living units. In the long term, the impact of the Village is expected to be major when it qualifies for low-income government assistance through the Lodge program. It is not anticipated that this same growth in impact will occur for the secondary suite option because it will remain a private living option. Both pilot projects will have a major impact on attracting older adults to move to Bassano and it is anticipated that their impact on economic growth will be moderate in the short term and major in the long term.

Replacing the Clubhouse will have a major impact on residents and newcomers in the short and long terms because of the increased quality of services and programs. It is anticipated that this will result contribute a moderate amount of economic growth in the short term and a major amount in the long term. Finally, the communication plan will have a modest impact on current residents, a major impact in attracting newcomers and a moderate impact on economic growth.

Tactics and Target Market Persona Analysis

Tactics	Personas as Potential Customers of Renewal Projects				
	Bassano Pioneer	Pioneer Newcomer	Person Disabilities	Engaged Family	Absentee Family
1 - Initiate Age-Friendly Policies	Secondary	Secondary			
2 - Expand Age-Friendly Community Services	Primary	Primary			
3 - Implement Age-in-Place Village Pilot Project		Primary	Secondary	Secondary	Primary
4 - Replace Drop-in Center with New Clubhouse	Primary	Primary		Primary	Primary
5 - Develop Age-in-Place Secondary Suite Pilot Project			Primary	Primary	
6 - Develop Comprehensive Communication Plan		Primary	Primary	Primary	Primary

Fig 15: Age-Friendly Community Target Market Customer Analysis

The Target Market Customer Analysis reveals that Pioneer Newcomers, with the economic capacity to rent a unit in the Village, are the strongest target market for four of the tactics. It is not anticipated that they would be interested in the secondary suite living unit unless they had a friend or family member who owned property in the town.

Because of the economic challenges facing many Bassano Pioneers, this persona is not expected to be a large market for the Village or the Secondary Suite pilot projects at least until the Lodge option is introduced. When that occurs, Bassano Pioneers will become a primary market for the Village.

It is anticipated that Persons with Disabilities will be the primary market for the secondary suite pilot and a secondary market for the Village. It is unknown how large this persona group might be.

Engaged families that are interested in multi-generational housing options are another primary market for the secondary suite pilot. This group has the additional potential impact to activate the real estate market through the purchase of a family home that can accommodate a secondary suite for their loved ones. It is expected that the Village option would be a secondary choice for this persona.

The Absentee Family persona would be expected to be most interested in the Village pilot project as a safe and high-quality living option for their senior relatives. The new clubhouse would also be a primary draw for this persona. The communication plan plays a primary role in convincing all non-Bassano personas to participate in the Age-Friendly Strategy.

PART 3 – Bootstrapping the Plan

The Pocket Lot Renewal and Age-Friendly Strategies outlined in Parts 1 and 2 provide a directory of actions that will help transform Bassano into the most Entrepreneurial and Age-Friendly Small Town in Canada. Although it is too early to have a full-cost for implementing all of the 12 tactics that make up the two strategies, it is reasonable to assume that this full cost is beyond the current capacity of the Town to invest in over a short period of time.

Bootstrapping is a business strategy that entrepreneurs use to start a venture when there is limited up-front capital. A start-up is launched as a minimum viable product (MVP) and then expanded over time using the early momentum and capital generated by the operation of the MVP venture. Bootstrapping works as well for social enterprise ventures as it does with for-profit businesses.⁸ A bootstrapping approach for Bassano is a roadmap that prioritizes the 12 tactics into a step-by-step program that is executed over time and as resources become available. What distinguishes this process from a traditional project-management based staged-implementation plan is that it begins with identifying the most critical and compelling component of the venture and uses it as the basis for launching a Minimum Viable Product that builds interest and momentum to enable the subsequent release of a series of ever more complete MVPs. The process continues until full build-out and while this could take years if not decades, the bootstrapping approach means that the venture is operational and providing benefits to the community from day one and continually gets better, gradually, over time.

For Bassano, the Minimum Viable Product that will generate the most interest and momentum is the Age-Friendly Village Pilot Project (Strategy 2 -Tactic 3). If the deployment can happen relatively quickly, it will be the first example of this innovative housing solution in the world. The resulting media attention will generate considerable interest and, when combined with a strong communication plan outlining the broader long-term vision of Bassano (Strategy 1 – Tactic 4C and Strategy 2 – Tactic 6), will kickstart both strategies and attract Pioneer Newcomers to move to the town as first residents of the Village.

⁸ Macmillan, Ian and Thompson, James D. The Social Entrepreneur's Playbook, Expanded Edition: Pressure Test, Plan, Launch and Scale Your Enterprise, Wharton School Press, 2013.

If the pilot project is in the area designated for the BID, the opening of the Village can be leveraged to publicly launch at no additional cost, the Town's intention to create the Bassano Innovation District (Strategy 1 – Tactic 4). The exact size and configuration of the Village pilot project remains to be determined in the third phase of this study. For the purposes of this section, however, the Village is assumed to initially consist of eight living units clustered around a communal deck with an entry and landscaping that is designed and branded with its own distinct identity. The Village location and layout should accommodate future expansion, ideally in a stepped manner, that can easily match increasing demand with the addition of more units.

Five of the eight living units could be made available as rental accommodation at full cost-recovery (lease plus operating and programming). It is anticipated that given the economic stress for most Bassano seniors, these units would be primarily rented by newcomers drawn from the larger region. Although small in number, this influx of new residents reinforces the goals of both strategies. Two living units could be made available to low-income Bassano seniors for a reduced rent as remuneration for their service as Bassano's Age-Friendly Ambassadors. Their duties, in return for the rental subsidy, would include meeting with prospective residents to describe the long term vision of Bassano and the benefits of living in the Village, providing simple on-site management and oversight of the complex, and helping to organize the Clubhouse activities. Who better to advocate for the Village as a great place for Newell County seniors to relocate into than a fellow older adult who lives in the project? The annual cost to the Town of the rent subsidy for these two units would be modest and more than offset by the services the residents would provide to promote and manage the Village (Strategy 2 – Tactic 2).

At the outset at least, the final living unit could be rented out as a short-stay rental home that potential newcomers could live in for a few days or weeks to get a sense of what Village life is like. The unit would also be an effective respite option for families going on vacation and needing a high quality, safe place for an older family member to temporarily reside. It could also serve as a vacation destination for seniors who live outside of the region, such as Calgary. On days when the unit is not occupied, it would be available as a show-suite to potential newcomers. The short-stay rental fees for the unit should be set to recover the full cost of the unit (after allowing for an appropriate vacancy rate factor) so that there is no net cost to the Town for this unit.

The show-suite can also be used to promote the Age-Friendly Secondary Suite option to local residents (Strategy 2 – Tactic 5). When there is a firm commitment from a landowner to rent a temporary secondary suite (on a full cost recovery basis), and the feasibility of locating a unit on the property has been confirmed, the town can order additional units for deployment within the community with no upfront cost and very little risk.

A new Clubhouse that supports enhanced social and community services to Bassano seniors should also be part of the first stage launch. Depending on the site chosen for the Village, this could be a renovated existing structure, or a prefabricated portable Clubhouse unit eased by the Town and incorporated into the Village Pilot Project. The lease cost for the portable Clubhouse could be partially or completely blended into the monthly rental fee for the living units in order to minimize the costs to the Town. The Clubhouse would be an attractive amenity for Village residents and a community-wide resource open to all Bassano seniors, providing a variety of social activities and other programming (Strategy 2, Tactic 4). A small area of the Clubhouse would be devoted to a display that describes Bassano’s vision of being the most Entrepreneurial and Age-Friendly Community in Canada. This would include plans, 3D renderings, and perhaps a 3D printed physical model of the Bassano Innovation District including Innovation Alley and the full built-out version of the Village pilot project.

The cost to the Town of launching these components as the first stage MVP are expected to be modest. All the operating costs (monthly rent, utilities, programming) for the Village and Clubhouse are paid by the residents. The deployment costs (transport, utility hook-ups, and site construction of the communal deck, entry and landscaping) can either be an up-front cost to the town or there is the potential to finance these elements over a five year term through a rental premium on the living units. The rent subsidy for the two low-income households is a cost to the town but is probably modest and should be considered as part of the communication and marketing program.

There is the risk of additional costs to the town if the living units are left vacant. However, the town also has several levers to mitigate this risk. These include a strong communication and marketing program tightly integrated with the media attention garnered from the Village deployment, the display of Bassano’s Entrepreneurial and Age-Friendly Vision in the Clubhouse, the advocacy of the Age-Friendly

Ambassadors, and the short-stay rental of the show suite. With that said, it would be prudent to create a reserve fund to cover any lease obligations due to vacant units. This is likely to be the only significant cost to the Town for the first stage MVP.

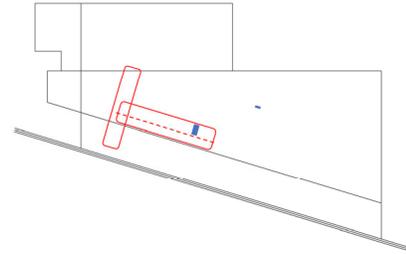
The second stage in the bootstrapping process should commence as soon as feasible after the launch of the Village MVP. It starts with the preparatory policy work needed to increase opportunities for secondary suites (Strategy 1 – Tactic 1), home-based businesses (Strategy 1 – Tactic 2) and small lot subdivisions (Strategy 1 – Tactic 3). The cost of completing this work should be modest as most of it can be done in-house by Town of Bassano staff and the contract planning consultant. When there is a clear indication of success with the first Village MVP measured by continued full occupancy of the rental units, sustained inquiries from potential newcomers, and strong usage of the Clubhouse by local residents, the second MVP should be publicly launched with the Early-Stage Public Incentive Program (Strategy 1 – Tactic 6) and the secondary suite and home-based business directories (Strategy 1 – Tactic 1D & 2C). The cost of the incentive program can be calibrated to match the financial capacity of the Town. The cost to complete the other work should be moderate as it involves work by external consultants in addition to those in-house.

The third stage MVP, executed only after there has been a demonstrated uptake of the stage two programming with increased business and real estate activity, would be to begin implementation of the Bassano Innovation District (Strategy 1 – Tactic 4) and the Small Lot Renewal Program (Strategy 1 – Tactic 5). This will leverage the momentum generated by small-scale entrepreneurial activities into larger scale commercial and residential investment from the private sector. The cost of this stage is likely to be major because it will involve physical infrastructure improvements to the utilities and streetscapes.

To match financial capacity, the implementation of this MVP can be staged over several years, starting with the most active area of the BID, potentially adjacent to the Village pilot project and then extending the upgrading out block-by-block as financial resources allow. It may be possible to piggy-back some of this redevelopment work onto new privately funded commercial construction projects that have been attracted to the Town.

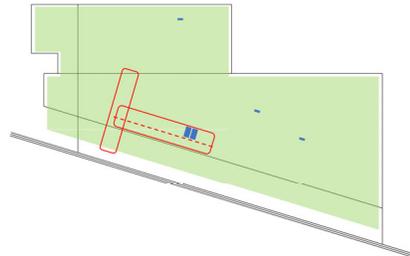
- Deploy Age-Friendly Village pilot project
- Concept Design of Bassano Innovation District
- Deploy Age-Friendly Secondary Suite pilot project

1



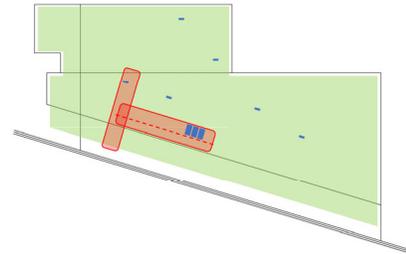
- Expand Age-Friendly Village as required
- Add Age-Friendly Secondary Suites as required
- Implement municipal policies for secondary suites, home-based businesses, and pocket lot subdivisions

2



- Expand Age-Friendly Village as required
- Add Age-Friendly Secondary Suites as required
- Initiate phased construction of utility upgrades and streetscape improvements to Innovation District

3



- Relocate Age-Friendly Village to be incorporated into the Bassano Project
- Add Age-Friendly Secondary Suites as required
- Continue phased construction of Innovation District

4

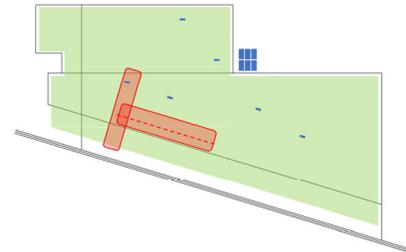


Fig 16: Bootstrapped Implementation Strategy

While this bootstrap proposal effectively implements the vision of the two broad strategies, it does not address the smaller but critical need to provide higher quality and more innovative supportive living options that fit within the public lodge system for low-income seniors and contribute directly to the long-term goals of the Bassano Project. This requires a second level of bootstrapping that is smaller, more focused, and has a research dimension that could also engage the Newell Foundation, Alberta Health Services, FABhouse (suppliers of the portable living units), and potentially medical researchers from the University of Calgary. This bootstrap proposal involves a small stepped expansion of the Village pilot project to include one or two smaller footprint units that would be used to test the integration of medical services and living support for meals, laundry, and housekeeping.

The goal of this testbed installation is to explore the potential of delivering the equivalent of SL3 level supported living within the Village context. It is anticipated that the first bootstrapping stage would be to pilot the provision of meals, laundry, and housekeeping services with traditional home care support to meet the requirements of SL1 and SL2 levels of supportive living. The second stage of the test would be to pilot the provision of unscheduled medical services required for SL3. This may require the relocation of the living unit onto the grounds of the existing Newell Foundation facility. Evidence-based evaluations of the test residencies could be conducted by medical researchers to validate the results of the pilot project.

Incorporating a University-based research project into the Village reinforces Bassano's brand as the most Entrepreneurial Age-Friendly small town in Canada. It is anticipated that the test unit(s) would have a rent subsidy arrangement funded through the research project and that there would be little to no financial obligation from the town.

All of this activity should contribute to energizing the Bassano Project and raising its profile within the Provincial Government. When it proceeds, there is the potential to relocate the Village out of the Bassano Innovation District and integrate it into the new Bassano Project. Alternatively, if the Age-Friendly strategy is very successful, the Village pilot project could remain in the BID and a second Village could be deployed in the Bassano Project.