Partnerships for Residential Affordability

Strategies for growth to meet the housing needs of current and future residents of neighborhoods surrounding the new McGill University Health Center

Final Report
Prepared for:
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Executive Summary

The Sud-Ouest and NDG-CDN Boroughs are facing imminent change in the residential environment due, in part, to the new McGill University mega-hospital. The mandate given to us by the Sud-Ouest and NDG community organizations includes several elements, all of which are detailed in this report.

We have conducted research about other cities in North America and Europe that have experienced similar cases of collaboration between institutions and community groups to develop affordable housing. From these case studies, we drew important key points that could be learned from to improve the partnership begun between community groups and the MUHC. Some of the salient points include the fact that partnerships have been successful when municipal involvement is a key feature of the agreement, in that municipalities have helped redevelop neighborhoods and create new affordable housing. Many of the case studies have shown that institutions generally have certain financial capabilities which can be used to attain loans to help community groups that may not have the same financial abilities. The cases clarified the fact that agreements signed between groups have been successful when a specific plan of action is created for how the impact of a large institution on a community can be minimized. Finally, the cooperation of many different stakeholders has proven positive results for redevelopment and creation of affordable housing. The job of creating affordable housing should not only be left to community organizations; rather, a combined effort by the institution, the municipality, local banks, private and non-profit developers, along with community groups can be quite effective.

We have done an inventory of vacant lands and underutilized buildings with the potential for residential conversion to provide community groups with the beginnings of a database of possible locations for new affordable or social housing in the studied neighborhoods. We have determined that vacant lots could accommodate about 950 new housing units (100 square meters in size) in both neighborhoods. In Saint-Henri, buildings with greatest potential for residential conversion could accommodate about 1,230 new units while in Saint-Raymond about 150 units could be built.

Finally, we have recommended two scenarios for how local community organizations can establish more effective partnerships for redevelopment with different stakeholders, including the MUHC, the Provincial government, the City of Montréal and the Sud-Ouest and NDG-CDN Boroughs. The first scenario is more realistic than the second and is rooted in existing actions and policy commitments of all parties involved, while the second scenario is more optimistic in that it builds on the realistic scenario by adding financial contributions and legislative changes that do not currently exist in Montréal.
Based on our research, we have drawn some conclusions about how to improve the residential affordability in the Saint-Henri and Saint-Raymond communities. The MUHC administration has already signed a partnership agreement with the Inter-Neighborhood Coalition to begin working with the community. This agreement is a good first step, but in order to ensure the viability and usefulness of this partnership for years to come, certain aspects are missing such as flexibility, long-term commitment to cooperation, transparency, and strategic plans for concrete actions to be completed by all parties.

The City of Montréal and its Boroughs, could take an active role in the partnership between local community groups and the MUHC to improve collaboration and to increase access to affordable housing for residents. Representatives from the City and Borough administrations should be integral parts of the MUHC’s Inter-Neighborhood Coalition. Additionally, although the City has made many good strides towards creating more affordable housing, but it needs to take a more forceful stance if its goal of 4,500 new units in the next two years will be met. A strict, consistent policy that the City enforces for all developers on the island to include 30% affordable housing units in any new development is the only effective way housing affordability will be achieved.

In order to ensure residents in the Sud-Ouest and NDG are not pushed out of their communities due to new developments such as the MUHC, we propose that community groups continue the research that was begun with this project. Although funding sources for research are rare, this project was the beginning of a community-university partnership and has the characteristics to secure funding from the federal government’s Community University Research Alliance (CURA) grant.
Acknowledgements

We would like to acknowledge the support and guidance of many people in the research and preparation of this report.

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List of Acronyms

ACC Athens County Commission
ADS Alternative Development Standards
ARMC Athens Regional Medical Center
BATNA Best Alternative to a Negotiated Agreement
BC British Columbia
BHA Boston Housing Authority
BOA Bank Of America
CBD Central Business District
CBO Community-Based Organizations
CDC Community Development Corporation
CDEC Corporation de Développement Économique et Communautaire
CHN Citizens for a Healthy Neighborhood
CLSC le Centre Local de Services Communautaires
CLT Community Land Trust
CMHC Canadian Mortgage Housing Corporation
CREESOM Comite pour la Relance de l’Economie et de l’Emploi du Sud-Ouest de Montreal
CURA Community University Research Alliance
EMCR Erasmus University Medical Center
FAR Floor Area Ratio
FISHA Fonds d’Investissement Social en HAbitation
FRAPRU FRont d’Action Populaire en Réaménagement Urbain
INRS l’Institut National de Recherche et de Sécurité
ISQ Institut de la Statistique du Québec
LOI Letter Of Intent
MSSS Ministère Santé et Services Sociaux Québec
MUHC McGill University Health Centre
NDG/CDN Notre-Dame-de-Grâce / Côte-des-Neiges
PDF Proposal Development Funding
RESO Le Regroupement économique et social du Sud-Ouest
RRAP Residential Rehabilitation Assistance Program
SEA Shaw Education for Action
SHDM Société d’Habitation et de Développement de Montréal
SHQ Société d’Habitation du Québec
SSHRC Social Science Humanity Research Council
TCPS Tri-Council Policy Statement: ethical conduct for research involving humans
TDR Transfer of Development Rights
TRG Technical Resource Groups
UDP Urban Development Projects
U of T University Of Toronto
WUMC Washington University Medical Center
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Residential Resources: Partnerships for Residential Affordability
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Review of Mandate

Nature and Scope
With construction already underway of the McGill University Health Centre (MUHC) on the Glen Yards site, surrounding neighborhoods are sure to see significant changes in the coming years. The Arbour study (2002), commissioned by the MUHC, states: “The MUHC will have an impact on the surrounding area. The extent of this impact depends on the characteristics of the local environment, as well as on the intentions and actions of the various stakeholders concerned.”

In particular, the residents of lower NDG (specifically Saint-Raymond) and Saint-Henri have cause for concern. The study by Arbour (2002) states that approximately 6% (830 people) of the hospital employees surveyed, intend to move into neighborhoods adjacent to the proposed mega-hospital. Strategies need to be put in place to make way for these workers and to ensure that existing residents of these neighborhoods will not be displaced. Recently, in Saint-Henri, up-scale condo developments have been built along the revitalized Lachine Canal. These condo developments in addition to increases in land values associated with the new hospital and increased demand for housing, could lead to a situation of excessive housing pressure in the area.

The MUHC administration signed an agreement with the local communities adjacent to the proposed mega-hospital outlining their joint commitment to collaborate and integrate the mega-hospital into the surrounding neighborhoods. The question remains: what strategies can be employed by local community organizations to work with the hospital and other stakeholders to minimize the possible negative impact?

Mandate
Our mandate, therefore, is essentially to do baseline research in an attempt to help the Saint-Henri and Saint-Raymond neighborhoods create a plan for community groups to work with the MUHC and other partners to develop affordable housing. Towards this objective, the research team undertook a comprehensive review of similar projects elsewhere in North America and Europe, to explore case studies in which large-scale institutions (such as hospitals and universities) have collaborated with local actors in trying to mitigate housing pressures, setting key precedents for meaningful partnerships in urban redevelopment. The exploration of these case studies will suggest constructive ways to move forward collaboratively.

In addition, the research team has done an inventory of the surrounding neighborhoods (i.e. within a 10 to 15 minute walk of the Glen Yard site), to take stock of available land and
buildings that have potential to be used for affordable housing development. An inventory has been created of vacant lots as well as properties with potential for residential conversion. This inventory has been used to determine the cost of acquiring such land and building new housing or converting existing buildings into housing. This information could be used by community groups to develop affordable or social housing in the future.

**Form of Recommendations**

Our recommendations take the form of a blueprint for establishing a successful partnership between collaborators with unequal power, in this case between the MUHC and community groups. These recommendations are based in part on lessons learned from the case studies. We have formed our specific recommendations into two scenarios with potential initiatives for each stakeholder to undertake. We propose actions for the MUHC, the government and community groups to undertake to work together for the protection and proliferation of social and affordable housing in the Saint-Henri and Saint-Raymond neighborhoods.

Additionally, we have provided an inventory of vacant lands within the two neighborhoods. We have also provided an inventory of buildings that have the potential to be converted into housing in the future. Information about each building includes: building address, square footage, owners name where possible, property values as assessed by the City of Montreal and the estimated number of units each building could accommodate. Using average values for purchase and construction, we have estimated the cost of building new housing or converting the existing buildings into housing.
Background

Some Definitions

Housing that is considered affordable for a given household is one that rent or monthly mortgage payments (including property taxes and heating costs) do not exceed 30% of the net monthly income of the household (Habiter Montréal 2005, 3). Rental housing qualifies as affordable if rent does not exceed 30% of a household’s net income that is under 80% of the median regional income, that which signifies a rent less than $900 per month, (including heating costs). Property is considered affordable when mortgage payments, including property taxes and heating costs do not exceed 30% of net household incomes below 120% of the median regional income. Based on this, we can estimate the maximum price of an affordable property at around $170,000 (Habiter Montréal 2005, 4).

Social housing is one type of affordable housing. It is very difficult to define precisely, because this type of housing can take several forms. Essentially, social housing helps people with low or very low incomes living with economic, social, or psychological difficulties. Included in these are single-parent homes, elderly, recent immigrants, large families, or deinstitutionalized patients. The goal is to offer these people adequate housing that respects their ability to pay and, in certain cases, the community care that they need. The private market cannot generate this type of housing on its own. It is for this reason that social housing needs strong public funding.

These definitions of affordable and social housing are based on those employed by the City of Montreal.
Demographics

Figure 1: The Study Area and the Proposed MUHC Site

Saint-Henri Demographics
Saint-Henri is a neighborhood in the Sud-Ouest borough of Montreal. It is bordered on the north by the Ville-Marie Expressway (Autoroute 720) and on the south by the Lachine Canal. The western border is Autoroute 15, and Avenue Atwater forms the eastern border.

In terms of population, the number of Saint-Henri residents has decreased by 9.2% since 1986, while the Montreal population as a whole has increased by 3.4% (CLSC 2001). See Table 1 below:

Table 1: Population Evolution of Saint-Henri

<table>
<thead>
<tr>
<th>Year</th>
<th>Population</th>
</tr>
</thead>
<tbody>
<tr>
<td>1986</td>
<td>14,933</td>
</tr>
<tr>
<td>1991</td>
<td>14,445</td>
</tr>
<tr>
<td>1996</td>
<td>14,005</td>
</tr>
<tr>
<td>2001</td>
<td>13,563</td>
</tr>
</tbody>
</table>
Out of all households in the neighborhood, 65.8% are families, 50% of which are single-parent households. In comparison, the rest of Montreal is made up of 33% single-parent households. Additionally, 21.8% of the population of Saint-Henri is made up of single people (CLSC 2001).

About 38% of families in Saint-Henri are considered low-income, compared to only 22.7% in all of Montreal. Of the single people in the neighborhood, 60% are considered low-income, compared to 49% of single people considered low-income in the City of Montreal more generally (CLSC 2001).

Between 1996 and 2001, there was a change in the demographics of the area. In 2001, 12% of residents were unemployed, which is a decrease from 26.8% in 1996. In 2001, 14.2% of the revenue sources were from government assistance, which was a decrease from 24.1% in 1996. This level is similar to the rest of Montreal; about 14% received government assistance.

In terms of mother tongue, 69% of the population of Saint-Henri is francophone, 14.3% are anglophone and 13.5% speak non-official languages. Since 1996, there has been an increase in immigration of 14.2%. In terms of immigration as a proportion of total population of Saint-Henri, 14.9% of neighborhood residents are immigrants. The percentage of population that has a university degree in the neighborhood is 26% (Solidarité Saint-Henri 2004-2005).

In terms of household income, the average is estimated to be $32,537. However, there are large disparities in income within the neighborhood. This is reflected in the differences between census tracts within Saint-Henri where average income varies from $25,800 to $43,000 (Census, 2001). The unemployment rate in 2001 was 12.1%, which is significantly lower than the 18.1% unemployment rate for the neighborhood in 1996 (CLSC 1999, 84).

Saint-Henri and Housing
The Sud-Ouest borough has a total of 7,621 social and community housing units, which is the largest number in all of Montreal (the total for the whole city is 51,364 units). Out of the units in the Sud-Ouest, the Saint-Henri neighborhood has 1,722 units (Ville de Montreal 2005).

The cost of living has changed between 1996 and 2001. The average cost of rent increased from $474 in 1996 to $509 in 2001. In 2001, 39.1% of the population spent over 30% of their income on housing. This is a decrease from 1996, when 49.6% spent over 30% of their income on housing (See Table 2 below: Solidarité Saint-Henri 2004-2005).

Table 2: Evolution of Housing Costs – 1996-2001
<table>
<thead>
<tr>
<th>Territory</th>
<th>Average cost of rent ($)</th>
<th>Housing costs exceeding 30% of income (% of pop)</th>
<th>Average spending on property by homeowners ($)</th>
<th>Housing costs exceeding 30% of income (% of pop)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Saint-Henri</td>
<td>474 509</td>
<td>49.6 39.1</td>
<td>716 840</td>
<td>26.3 27.7</td>
</tr>
<tr>
<td>Montréal</td>
<td>543 570</td>
<td>44.7 37.5</td>
<td>849 906</td>
<td>22.5 19.8</td>
</tr>
</tbody>
</table>

Based on 2001 statistical information, out of all Montreal residents, 36% were homeowners, while 64% were renters. In Saint-Henri in 2001, 13.8% of residents were homeowners, and 86.2% were renters (FRAPRU 2001).

Table 3: Homeownership vs. Renters in Saint-Henri - 2001

<table>
<thead>
<tr>
<th>Territory</th>
<th>Homeowners as % of Population</th>
<th>Renters as % of Population</th>
</tr>
</thead>
<tbody>
<tr>
<td>Saint-Henri</td>
<td>13.8</td>
<td>86.2</td>
</tr>
<tr>
<td>Montreal</td>
<td>35.8</td>
<td>64.2</td>
</tr>
</tbody>
</table>

In terms of the state of the housing stock in the neighborhood, 66% of the housing was built before 1960. In terms of the condition of the housing stock, according to the 2001 census, approximately 12.5% (860/6835) of the housing units in Saint-Henri required major repairs (Census 2001).

**Sud-Ouest Borough Interests**

The Sud-Ouest Borough has very recently completed their Borough Plan for inclusion in the Montreal Master Plan. It will be important for the community to understand the Borough’s vision for the future of Saint-Henri. The information in this document has been taken from the Borough Plan with additional information provided by an interview with Sylvain Villeneuve, the urban planner in charge of the integration of the MUHC into the Borough.

The Sud-Ouest’s plan calls for a strong application of the City of Montreal’s Housing policy. The City’s policy of diversity is a key theme to all of their site- specific planning areas. Overall they want to favour an increase in population while keeping the existing residents in the neighbourhood.

In terms of the impact of the MUHC, the Borough is most concerned with permeability, both on the level of traffic and of employment. They are interested in the potential for lab space construction but not to the detriment of the planned development laid out in their
section of the Master Plan. Mr. Villeneuve explained that the Borough will be determining
the type of development they are interested in pursuing for the area in the near future.

In terms of social and affordable housing, Mr. Villeneuve stressed that Saint-Henri has one
of the highest numbers of social and affordable housing units in the City. Borough officials
do not see the MUHC as a significant threat since it will be located closer to Westmount, a
wealthier Borough. The Borough officials do not predict that the MUHC will have a
negative impact on housing affordability in Saint-Henri. The Borough is, however, interested
in consolidating empty lots within the area and improving the quality of the built form.

**Saint-Raymond Demographics**
The neighbourhood of Saint-Raymond is located within the borough of NDG/CDN. Its
boundaries are Sherbrooke Street to the north, the St. Jacques Escarpement to the South,
Madison Avenue to the west and the Decarie Boulevard to the east.

In 2001, NDG was recorded as having a population of 64,675 which had grown 2.7% since
the 1996 census (CDEC 2005). However, areas within NDG are growing at different rates
and within the area of Saint-Raymond the population actually decreased by 1% within the
same time period (Barrett et al. 2005, 5).

There are 30,225 private households within the NDG neighbourhood of which 41% are
single person households. These single person households are especially concentrated south
of Sherbrooke and are extremely significant for this study (CDEC 2005). The
NDG area is also home to 16,245 families of which 23% are single parent households
(CDEC 2005). However, the Saint-Raymond neighbourhood, which is closest to the
MUHC site, has a higher number of single parent families, at 33% (Barrett et al. 2005, 6).

Broken down by language, 43% of the residents are anglophone, 26% are francophone and
31% speak another language as their mother tongue (CDEC 2005). In terms of immigration,
35% of NDG residents are immigrants and 12% hold citizenship other than Canadian. In
Saint-Raymond, however, 89% of residents are immigrants and during the period from
1991-96 the immigrant population increased by 33.2% (CLSC 2001).

In 2001, the average income for NDG was $65,931 for families and $50,600 for households,
and the unemployment rate was 10 % (CDEC 2005). However, there are significant revenue
disparities within NDG and the average income levels range from $25,000 to $40,799
(CDEC 2005). Saint-Raymond in particular has an unemployment rate of 12% and the
average household income is $34,000.

**Saint-Raymond and Housing**
In 2001, the divide between rental and owned housing in NDG was 69% rental to 31%
homeowners, representing a slightly higher rental rate than the Montreal averages of 64%
renters to 36% homeowners. In Saint Raymond, 78% of residents are renters, while only 22% of homes are owned (Barrett et al. 2005, 14).

Table 4: Homeownership vs. Renters in Saint-Raymond – 2001

<table>
<thead>
<tr>
<th>Territory</th>
<th>Homeowners as % of population</th>
<th>Renters as % of population</th>
</tr>
</thead>
<tbody>
<tr>
<td>Saint-Raymond</td>
<td>22</td>
<td>78</td>
</tr>
<tr>
<td>Montreal</td>
<td>36</td>
<td>64</td>
</tr>
</tbody>
</table>

Average rental rates in Saint Raymond are significantly lower than that of Montreal at $481 per month (Arbour 2005). Approximately 33% of Saint-Raymond residents pay more than 30% of their income on housing.

Table 5: Average Cost of Rentals in Saint-Raymond –2001

<table>
<thead>
<tr>
<th>Territory</th>
<th>Average cost of rent ($)</th>
<th>Housing costs exceeding 30% of income (% of pop)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Saint-Raymond</td>
<td>502</td>
<td>481</td>
</tr>
<tr>
<td>Montréal</td>
<td>543</td>
<td>570</td>
</tr>
</tbody>
</table>

In terms of the state of the housing stock in NDG, of 32,205 housing units, 3,640 units need major repairs. Major repairs include replacing defective plumbing or electrical work, house frames, walls, ceilings and floors that needed reparation. Of the 3,640 housing units needing major repairs in NDG, a significant portion are located in the Saint-Raymond neighborhood, where approximately 360 units (10% of the total) required major repairs (Census, 2001). The Montréal average for housing requiring major repairs is 8.5%.

NDG-CDN Borough Interests

The Borough of NDG-CDN has long been aware of the imminent arrival of the MUHC. The following information on what they see as pertinent, in terms of housing and the impact of the MUHC, is gleaned from their Borough Plan and a meeting with Richard Gourde, an urban planner with the Borough of NDG-CDN on September 27, 2005.

Mr. Gourde explained that in terms of gentrification, the Borough sees the area directly north of the hospital site as the area most at-risk, with minimal impact elsewhere. Saint-Raymond in particular, will be less attractive due to the multiple barriers to movement along its borders. That said, Saint-Raymond is the object of attention in the Plan, showing where the Borough wants to consolidate residential and commercial functions, improve accessibility, improve the overall image of the area and valorize the natural beauty of the St. Jacques Escarpment. The Borough acknowledges a significant problem in the quality of the...
housing stock of the area. In regards to gentrification, however, Mr. Gourde expressed that some gentrification or influx of new residents could be good for the area which has been chronically depressed and needs, in the Borough’s eyes, an increase in dynamism. New housing is being built in the Saint-Raymond area and increased density is being encouraged to give the area a large enough population size to support local services.

With regard to possible negative ramifications of the introduction of the MUHC, the Borough is most concerned both with traffic planning and the influx of secondary laboratories. The Arbour Report (2002) asserted that the area has a significant amount of empty commercial space and that there was abundant room for the necessary influx of secondary commerce required by the hospital. Mr. Gourde, however, explained that this space consists mostly of offices, which do not possess the necessary qualities to be converted into laboratories. The Borough of NDG-CDN is currently studying how to deal with this problem. A potential hazard of this issue is that developers could ask for zoning changes in order to demolish existing buildings (that are possibly currently zoned residential) to build new labs. This would have the effect of decreasing the amount of housing in the area, and may have an impact on the quantity of affordable housing.
Methodology

In order to identify potential case studies, the following were some of the key methods employed:

- Contacted local experts on gentrification and neighborhood change in Montreal at the INRS –Dr. Damaris Rose and Dr. Gilles Senécal
- Posted call for case studies of partnerships between large-scale institutions and communities on an urban geographers list serve based out of the University of Arizona: UrbGeog listserv URBGEOG@LISTSERV.ARIZONA.EDU
- Conducted extensive internet searches
- Conducted extensive searches within journals – using McGill Library
- Conducted extensive searches using different databases: including GEOBASE, WEB OF SCIENCE, GOOGLE SCHOLAR, PROQUEST

In order to learn more about the housing situation in the two boroughs, the following were some methods used:

- Conducted interviews with City of Montreal officials (at the Boroughs of NDG/CDN and Sud-Ouest),
  - Sylvain Villeneuve: Conseiller en aménagement, Arrondissement Sud-Ouest, Division de l'urbanisme (urban planner concerned with the integration of the MUHC into the Sud-Ouest borough) October 20th, 2005.
  - Sylvain Theriauld: Conseiller en aménagement, Arrodissement Sud-Ouest (urban planner in the Sud-Ouest borough, formerly with the Municipal Housing Taxation and Assessment department and helped to create the Habiter Montreal document) October 25th, 2005.
- Consulted on-line documents and Borough Master Plans.

In order to begin taking stock of vacant and underutilized land and buildings with the potential for residential conversion, the following were some of the key methods employed:

- Accessed the City of Montreal database: “Caractérisation du potentiel de transformation des batiments non résidentiels en unités d'habitation,”
- Attained an assessment of empty lots done by the City of Montreal in 2003.
- Conducted field work, including data collection and verification of database information.
Case Studies: Models from Elsewhere

1. Northeastern University and the Davenport Commons

Summary:
Northeastern University is located in Boston, Massachusetts, which has an extremely tight housing market, characterized by escalating rents and a very limited supply of affordable housing. Affordable housing is defined by the Boston Housing Authority as a household should not pay more than 30% of its total income to rent (BHA 2005). The neighborhood adjacent to the university, Roxbury, is one of the last bastions of affordable housing in Boston. As part of the University’s expansion, it proposed creating more student residences in the Roxbury neighborhood. This was met with considerable resistance from the community. As a way to try and mediate this resistance, the University proposed developing both student and affordable housing in the neighborhood, such that the student housing could provide an internal subsidy for the affordable housing units. In the end, the project provided an innovative model of community housing with 125 units for students, 75 owner-occupied townhouses and 2100 sq. ft of retail space (Calder, Grant & Muson 2005, 253-267).

Stakeholders:
- Northeastern University – contributed project financing in terms of access to and willingness to guarantee bonds and made a serious equity contribution, which was essential to the project.
- Madison Park Development Corporation – contributed expertise in housing and commercial project development in the Roxbury neighborhood.
- Trinity Financial, an affordable housing developer - contributed expertise in assembling complex real estate projects and managing development projects.
- Housing Investments Inc.- provided valuable guidance in the early stages of the project. The organization helped all involved stakeholders come around the table to collaborate.

Lessons Learned:
In this case, strong leadership proved crucial. Both the mayor and the President of Northeastern University were strong supporters of the project in the face of opposition from within the community and within the university. Another key lesson of this project was that the consultants working with the university were chosen because of preexisting relationships with the local government and community organizations and they played a key role in bridging the gaps between the university and the community (Calder, Grant & Masson 2005, 264). Additionally, Northeastern’s financial strength provided non-profit developers with a unique...
opportunity: the chance of financing moderate-income homes through bonds issued with the schools’ strong credit rating. This is considered a positive outcome for both sides in so far as the university added nearly 600 beds to its holdings, the city disposed of long underused parcels of land in a fashion that helped the affordable housing situation, and the community won a number of concessions including affordable home ownership units as opposed to affordable rental units. Although the university proposed affordable rental units, the community preferred affordable home ownership options and succeeded in achieving this. This plan produced a lower overall density and greater transparency with regards to the University Master Plan.

**Funding Sources:**

As aforementioned, the university was able to provide the backbone of financing for this project. The university had a strong credit rating, so was able to have considerable access to loans and provide a large amount of equity themselves. Further, the development of student housing created an internal subsidy for the affordable home-ownership units.

**Role of Community Mobilization:**

This project was not without opposition within the Roxbury community. Opposition was rooted primarily in two concerns: the community’s right to be heard and Northeastern’s encroachment into Roxbury. Community concerns ranged from issues related to the proposed design to the possibility of gentrification and displacement (Calder, Grant & Masson 2005, 258).

**Applicability to the MUHC Case:**

A key similarity between this case and the case of the MUHC is the fact that this is a large institution – i.e. a university negotiating with a community towards the provision of affordable housing in the neighborhood. The partnership is characterized by an unequal balance of power between the community and the university. Nonetheless, they managed to negotiate a solution that was amenable to both parties.
2. Athens Regional Medical Center and Citizens for a Healthy Neighborhood

Summary:
The Athens Regional Medical Center (ARMC) is a regional hospital located in the town of Athens, Georgia. Athens is a college town, and as such, the University of Georgia is the town’s largest employer, followed by the ARMC. The hospital acts as a quasi-public entity with the right to eminent domain and zoning. While the hospital itself is essentially a private, non-profit entity, its governing body, the Hospital Authority, is a quasi-public entity, with its members appointed by local officials. This case basically revolved around the hospital’s Master Plan, which proposed expanding the size of the site occupied by the hospital from 39 to 60 acres. This scale of expansion would have involved the razing of approximately 60 homes in the Normaltown neighborhood, immediately adjacent to the hospital. Normaltown is what is referred to as an ‘intown’ neighborhood because of its proximity to downtown and its location inside the loop of highways that encircles Athens. In terms of community demographics, it has historically been a working and upper class white community, but today it is more diverse and has significant African American and Hispanic minorities. An interesting aspect of this case is that the hospital had no obligation to negotiate with the Citizens for a Healthy Neighborhood (CHN), which was the coalition of neighborhood residents that mobilized to fight against the expansion. Ultimately, the hospital needed the Athens County Commission (ACC) to guarantee a bond required to finance the expansion. So the CHN focused on applying pressure to the ACC so that it would deny the bond. However, the ACC issued the bond without delay, not wanting to be perceived as micro-managing the hospital authority. After appealing to the state, the CHN recognized the need to try and find some sort of compromise with the hospital. The ARMC recognized that in terms of public relations it was desirable for them to negotiate with the CHN regarding its proposed land use plan. As such, they decided to form an Advisory Committee to review the Master Plan. Both groups agreed to end their open hostility and enter into an organized dialogue. This dialogue continues to this day, although the differential power dynamic between the two key stakeholders remains. The new Master Plan for the hospital expansion only proposed to raze 10 homes as opposed to the initial 60. In addition, many of these properties were already owned by the Hospital (Martin 2004, 589-611).

Stakeholders:
• Athens Regional Medical Center was willing to negotiate a compromise with the community despite the fact that they were not obligated to do this by the state.
• Athens County Commission was unwilling to interfere with the activities of the Hospital on behalf of concerned residents.
• Citizens for Healthy Neighborhoods, a coalition comprised principally of four neighborhood associations – King Avenue, Cobbham, Ogletrope and Boulevard, four additional neighborhood organizations were consulting members: Holman-Sunset, Pulaski Heights, The Plaza and Five Points.

This coalition decided to negotiate in good faith after all other options were denied them by the local County Commission.

Lessons Learned:
The key lessons learned in this conflict were that the Hospital voluntarily chose to act as a good corporate citizen and work with the community, despite the fact that they were not obligated to. Although the Athens County Commission did not come to the community’s aid in negotiating with the Hospital, the Hospital recognized its need to be accountable to the surrounding neighborhood and as such decided to find a solution that was amenable to everyone. This had the effect of creating a new space of engagement in terms of the politics of local land use and illuminates the potential for collaborative urban governance outside the structure of the elected state.

Funding Sources:
An interesting note about funding for the expansion in this case was that the Hospital had to have the bond guaranteed by the Athens County Commission. Much of the conflict centered on trying to get the ACC to deny guaranteeing the bond to fund the expansion. Interestingly, the ACC was not interested in interfering in the conflict on behalf of the Citizens for Healthy Neighborhoods in this case, and decided to guarantee the bond with no questions asked.

Role of Community Mobilization:
Community mobilization was very significant in this case and it is unlikely the community would have achieved a desirable outcome without it. Residents used yard signs, protests and media coverage to embarrass the hospital. This was key in forcing the Hospital to negotiate with the community, as it was not obligated to do so by the Athens County Commission.

Applicability to the MUHC Case:
In comparison to Montreal, this case involves a Regional Hospital that provides care and specialty services for much of the surrounding region. Similarly, the MUHC project will be an amalgamation of five English hospitals in the City of Montreal, serving as a regional English health center. Further, the location of the two hospitals is comparable in so far as they are both located in inner city areas. Another interesting similarity is the fact that the partnership in both cases was entered into voluntarily by the Hospital, which had no statutory responsibility to do so. Also, in both the case of Montreal and that of Athens, the partnership is characterized by unequal power between the partners. It remains to be seen whether the partnership in the case of the MUHC will have the capacity to guide change in the surrounding community to minimize negative impacts for local residents to the same extent this partnership did in Athens, Georgia.
3. Charlotte, North Carolina and the Bank of America

Summary:
The Bank of America (BOA) had the desire to transform the City of Charlotte’s image and neighborhood spaces to attract and retain a globally mobile labor force needed to meet corporate goals (Smith and Graves 2005, 406). Thirty years ago, the BOA began a process of renovation and improvement of the Fourth Ward in Charlotte to attract professionals to move, buy homes and stay in the area. Residents who were living in Charlotte before the Bank’s actions were also incorporated into the transition.

Stakeholders:
- The Bank of America supplied monetary resources and low-interest mortgages and loans for home development.
- The Salvation Army developed a 130-unit apartment project with a fifth of the units reserved as federally subsidized housing for the elderly.
- A Community Development Corporation bought some apartment blocks, renovated them and turned them into condominiums.
- The municipality developed and approved special zoning ordinances to create more residential space in the ward, to underwrite the cost of landscaping and to ensure the upgrading of services and the appearance of the neighborhood.
- The power company worked to bury power lines
- Other local banks contributed to the revitalization by supplying low-interest mortgages and loans to residents.

Lessons Learned:
Residents who were living in Charlotte before the Bank’s actions were incorporated into the transition. The new units developed by the CDC were first offered to the original tenants at reduced prices and interest rates. One of the key ideas behind the redevelopment, according to the bank, was “to add to the population of the Fourth Ward, not diminish it. We wanted the people already there to stay (Smith and Graves 2005, 411).”

Funding Sources / Partnership Ideas:
The Bank established a partnership with the municipality of Charlotte to develop and approve special zoning ordinances to create more residential space in the ward, to underwrite the cost of landscaping and to ensure the upgrading of services and the
appearance of the neighborhood. Bank officials enticed other corporate players, such as the power company and other local banks, to contribute to the revitalization.

**Role of Community Mobilization:**
There was not enough information published about this case to properly understand the role of community mobilization.

**Applicability to the MUHC Case:**
There was an unequal power dynamic between a corporation and the community, but an unequal redevelopment scheme was avoided when the Bank of America used its authority to improve the neighbourhood, not just for the benefit of the Bank employees. The BOA connected stakeholders such as the municipality, community organizations, and other banks to help in the redevelopment of the whole Fourth Ward neighbourhood.
4. St. Louis, Missouri and the Washington University Medical Center

Summary:
The Washington University Medical Center (WUMC) began working in the 1970’s to redevelop the surrounding neighbourhood, which had experienced some economic hardship and a population that was dominated by students and elderly, many who were addicted to alcohol. The goals of the WUMC were to make the neighborhood safe and attractive, promote commercial, industrial, and residential land use, and to create racial and economically mixed residential populations in the areas. The WUMC used multiple strategies in its redevelopment efforts, including special attention to existing population demographics. It was able to stabilize its population because the quality of housing and commercial building stock was preserved. Residential population loss was stopped and reversed, in addition to becoming more racially and ethnically mixed, in that the white population began to stabilize and equal the black population. Other changes that accompanied the redevelopment included a balancing of the elderly population, an increase in the number of people with college degrees, and an increase in the number of people employed. In 1970 only one-third of the population was employed, and by 1990 half of the residents were working.

Stakeholders:
• The municipality offered financial assistance and encouraged the WUMC to initiate neighborhood redevelopment
• The Medical Centre led the redevelopment effort by providing some capital and political muscle to push the project along
• Local banks provided some loans
• Small private developers worked on rebuilding and improving the housing and building stock

Lessons Learned:
The results of this study show that inner-city neighborhoods can be redeveloped in a way that makes them suitable not only for corporations and service industries, but also for a diverse residential population. “People of different races, ethnic groups, stages of life, and economic standing can find a comfortable place to reside within such neighborhoods (Goodman and Monti 1999, 125).”

Funding sources / Partnership ideas:
The city offered financial assistance in the form of grants and loans to developers to reduce building costs and property acquisition costs, subsidies were given to renters and homebuyers sometimes in the form of interest rate reductions and payment of closing costs. Also, property tax abatements were given for commercial and industrial developments (Goodman and Monti 1999, 106).

**Role of Community Mobilization:**

There was not enough information published about this case to understand the role of community mobilization.

**Applicability to the MUHC Case:**

This is a case about a university’s hospital that took an interest in the redevelopment of its neighborhood and used its financial and political power to improve the neighborhood. The housing and demographic diversity of the neighborhood was in decline, but with support and encouragement from the municipality, the hospital administration pursued redevelopment.
5. Rotterdam, Netherlands and the Erasmus University Medical Center

Summary:
The Rotterdam medical complex became a true mega hospital in 1998 with the amalgamation of the Faculty of Medical and Health Science of Erasmus University and the Rotterdam academic hospital which had recently amalgamated a number of smaller hospitals, namely the Dijkzigt hospital, the Sophia Children’s hospital and the Dr. Daniel den Hoed Kliniek cancer clinic (Overbosch Communicatie 2004). The present location of this mega hospital is a 12ha area in Rotterdam’s inner city. The complex as it exists in its present incarnation has entirely built out its block of land, leaving no space on its parcel for future construction (Van Den Berg 1996). Due to the amalgamation, the site is being rebuilt as of 2004, with the first new sections planned for occupation as of 2008. Part of the criteria for this new construction is that the hospital must continue to function as a university hospital facility during the entire reconstruction period (Overbosch Communicatie 2004). Questions addressed include: can this complex revive the inner-city core with spin-off jobs and business and what effect if any will it have on the surrounding area? From the research done in 1996, this type of complex can have a structuring effect on the surrounding area. However, in the case of the Rotterdam complex, the economic effects were minimal as there was little to no land for new enterprises to locate (Van Den Berg 1996).

Stakeholders:
- Erasmus University Medical Center (EMCR) merging two hospitals onto an already fully built-up area in the city’s core and continuing to function as a centre of medical excellence
- City of Rotterdam’s municipal government wanting to increase growth in Rotterdam’s declining city core
- New businesses; as potential spin-off medical enterprises looking for space to locate near the source of innovation and consumption of their products

Lessons Learned:
Though the study starts with the premise that medical complexes can be catalysts for the economic revitalisation of their surrounding areas, both on the level of job creation and housing renovation, read gentrification, this is not a given. A mega-hospital needs more than simply its presence in an area to significantly impact the surrounding built environment. Available land and political policies have a significant impact. Actors, in this case the university, hospital and local government, must coordinate their activities to ensure realising the potential of redevelopment.
Funding sources / Partnership ideas:
This study showed that for a complex of this kind to have a positive impact on the surrounding area, there must be a concerted effort by all the involved actors.

Role of Community Mobilization:
There is no mention of community mobilisation in this case which may be a result of the hospital not expanding its existing geographic footprint. In the material consulted, the attitude towards the local community is exemplified by the statement that locating this type of regional health centre in the inner-city leads to an increased number of low grade, low quality walk-in cases such as drug overdoses which use the resources of the hospital inefficiently.

Applicability to MUHC Case:
This case study is very similar to the planned MUHC mega-hospital; it is located near the center of a large metropolitan area where land constraints and traffic congestion are major issues. Additionally, Rotterdam and the Netherlands in general have a similar political climate to that of Québec. This case also lends credence to the logic of the development of a medical business hub on the former Turcot Yard site. Without specified areas where new buildings can be built that cater to the specific needs of these new businesses, economic growth is in no way certain.
6. Europe: Large-Scale Urban Development Projects

Summary:
This case is somewhat different from the previous case studies. This article compares 13 different Urban Development Projects (UDPs) in 13 different cities within the European Union. The projects are: Rotterdam’s Kop Van Zuid, London’s South Bank, Berlin’s Adlershof, Copenhagen’s Orestaden, Dublin’s Docklands, Athens’ Olympic Village, Lisbon’s Expo 98, Vienna’s Donau City, Bilbao’s Abandoibarra, Birmingham’s CBD, Naples’ Centro Direzionale and Lille’s Euralille. The focus of the analysis is on the use of these large “special planning areas” to establish exceptional planning measures which are elite-driven with limited democratic accountability. The research found that these projects use socio-spatial restructuring to influence social polarization, inclusion / exclusion and the empowerment / disempowerment dynamic. It criticizes the use of stakeholder participation and partnerships as these processes are extremely selective and less accountable than traditional government processes. In particular, they are non-formalized and non-transparent, without mandatory on-going participation. However, these kinds of mega-projects have a vested interest to maintain legitimacy, social cohesion and sufficient political support (Swyngedouw 2002).

Stakeholders:
- Project developers interested in increasing land rents to make a significant return on their investments
- Municipal governments looking for ways to reinvent their cities as attractors in the global market
- State governments applying neo-liberal governing ideas of investment in space to create a climate of economic growth and strength. They often lead and finance UDPs
- Local communities alienated from the conception and approval process
- Special interest groups have the potential to redirect public attention and force change in elite driven planning processes, or to take part into a stakeholder discussion or simply to be kept outside of the process

Lessons Learned:
UDPs have the potential to accentuate socio-cultural polarisation by increasing land rents and displacing the poor. They demonstrate a trend in changing the priorities of local, provincial and state governments from social investment to built investments and restructuring the labour market. All of which fulfil the agendas of a select group of elite decision-makers who have little or no responsibility to the citizens.
Another issue to keep in mind, though perhaps not yet a threat in the situation of the MUHC, is the use of targeting area development to create a discourse where existing populations no longer fit their environment and are therefore recast as “problematic, excluded, marginalised and non-integrated”. This is the first step before a discourse of removal or relocation can set in.

**Funding Sources / Partnership Ideas:**

Public-private partnerships have the potential to favour elite-driven less democratic planning processes. State and municipal governments often lead and finance these projects. Stakeholder participation is viewed negatively as participation is not mandatory, and decision-making is often partisan to those represented. Additionally, overall transparency and accountability can be compromised.

**Role of Community Mobilisation:**

In these cases community mobilization is vital and an important tool for change. This paper states that the majority, the silent majority that is, of constituents support these types of UDP initiatives. Those groups who do critique projects must be incorporated into the planning process to maintain the project’s overall credibility with the general public.

This paper critiques the practice of stakeholder participation of its lack of transparency and accountability but it does concede that opposition groups either through this process or through publicity campaigns and protests have been able to modify, change or even stop these types of projects.

**Applicability to the MUHC case:**

The analysis of multiple UDPs’ influences on real-estate markets, namely their raising of prices and their displacement of social or low income housing, within a similar political context (in the EU) to that of Montreal, is of prime importance. The study’s finding that these “special planning areas” have a tendency to be elite driven and less democratic is also a worrying trend that should be considered when looking critically at the MUHC. The formulaic application of local participation is also especially relevant, as is the finding that local grassroots movements have occasionally managed to change the direction of decision-making bodies. Additionally, the poor integration the study found of UDPs within the larger city fabric, both politically and physically is an issue that significantly impacts surrounding neighbourhoods and has a potential to be repeated in the MUHC context.

All of the above must, however, be tempered by the difference in size, multi-functional character and specific political aim to change the nature of an area. These differences are inherent in the character of the UDPs studied.
7. Solin Hall: McGill University and Saint-Henri

**Summary:**
McGill University wanted to build an off-campus student residence, Solin Hall, on the site of an abandoned industrial building in Saint-Henri and change the existing zoning from industrial to residential. In 1989, the city agreed with the zoning change, but there was strong resistance from different community groups, headed by the CREESOM, an umbrella group whose members include municipal and other governmental representatives, business people from the Sud-Ouest, and local action groups. These groups were concerned that the student housing would destabilize the neighborhood environment for the local francophone population. The community groups already had prepared a proposal for revitalization of the neighborhood to preserve the industrial character, housing and jobs for residents. Even though there were objections from local community groups during the public consultation, the City and McGill eventually proceeded with the plan (Koleilat-Barrage 1998). The local community groups and McGill University, however, created a four-protocol agreement that included the following goals:

- To integrate the residence hall and the students into the community
- To provide consulting, research, and training services to local associations through student work
- To provide a $500,000 loan at favorable lending rates for social housing
- To give preference to area residents and entrepreneurs for various jobs at the residence

McGill loaned money through the Fonds d'investissement social en habitation (FISHA) for the provision of low-cost housing to local residents, and employed local contractors for construction. Students’ contact with the neighborhood was mostly informal through voluntary participation in community activities and social engagement such as a food drive initiated by the students. The McGill School of Urban Planning provided consulting services for Triangle Saint-Henri, a social housing project, and prepared an analytical report to a local non-profit organization about possible resources. Management students from McGill created a community food resource inventory. In evaluating the results, it can be said that local hiring was less notable, research and training services was the most fruitful, and funding was very successful.

**Stakeholders:**
- McGill University
• Comité pour la relance de l’économie et de l’emploi du sud-ouest de Montreal (CREESOM - Coalition of representatives from public and private sector, as well as local community groups)

A McGill/Sud-Ouest Joint Committee was formed, with representatives from the Table de Concertation (an assembly that mixes non-profit groups and members from the private sector and non-profit organizations), Urgence Sud-Ouest (an action group formed along with a supervising committee, the Comité de Survie et de relance du sud-ouest de Montreal), and McGill faculty and staff members.

**Lessons Learned:**
This case illustrates the important role of the local community groups to protect the existing residents and preserve the existing character of the neighborhood. Also, it shows that an agreement should be prepared in detail to ensure that there will be no possible confusion in interpretation for the role of each participant.

**Funding Sources/Partnership Ideas:**
McGill loaned money to create social housing, and provided consulting and research services to the neighborhood as an academic institution. It encouraged students to integrate into the community, and tried to create jobs for Saint-Henri residents in the residence hall.

**Role of Community Mobilization:**
In this case community opposition played a key role in bringing McGill to the negotiating table. The project required rezoning (from industrial to residential), and prior to the City rezoning the area, CREESOM had been preparing a redevelopment plan for the South-West. The plan focused on the need to preserve the industrial heritage of the area, as well as housing and job creation that catered to existing residents. As a result of this significant opposition, public consultations were held prior to the rezoning, at which many community groups voiced their opposition to the project. As a result the McGill/Sud-Ouest Joint Committee was formed and it was this body that negotiated to ensure at least some benefit to the existing community from McGill’s insertion into the area (Koleilat-Barrage 1998, 19).

**Applicability to the MUHC case:**
This case is similar to the MUHC case in that local community groups and residents did not have much power in confrontation with the institution and the City which favored the development of the institution. This case happened in the same neighborhood, Saint-Henri, and the involved stakeholders are also similar. Unfortunately, we have been unable to find contacts who know whether the
agreement was followed through and what has become of the partnership between the Saint-Henri community and McGill University.
Salient Points from the Case Studies

Important lessons can be learned from each case study and brought together to help determine the best way for community groups to work with the MUHC administration.

The case of Northeastern University has similar stakeholders: a non-profit housing developer and Community Development Corporation. In Montréal, these groups have signed an official agreement with the University’s Hospital administration to say that they will work together to address issues in the surrounding communities such as affordable housing. Important to this case is that the university used its financial strength to access loans and that the rent from student housing was used as an internal subsidy for the affordable home-ownership units for community members.

The stakeholders in the Athens Regional Medical Center (ARMC) case consist of a mega-hospital and a community group. A salient point is that the Medical Center was not required by the County Commission to recognize the needs of the surrounding community. Rather, similar to the MUHC, the ARMC voluntarily entered into partnership with community groups to minimize the negative impact of the hospital expansion.

The Bank of America (BOA) in Charlotte, North Carolina, is a case that involved many more stakeholders than are involved in the case of the community groups working with the MUHC. One stakeholder, the municipality of Charlotte, was involved in redevelopment efforts and used planning tools to create more residential spaces. An important difference is motivation. Redevelopment and housing improvement was initiated by the BOA, in order to attract employees to Charlotte. An additional point is that the Bank had a lot of financial clout to provide low mortgage rates and low-interest loans for housing development.

The case of the Washington University Medical Center (WUMC) in St. Louis, Missouri, highlights the importance of a municipality’s involvement in housing and neighborhood redevelopment efforts. The City of St. Louis offered financial assistance and encouragement to the WUMC to take initiative and to begin redevelopment in the neighborhoods surrounding the hospital. The hospital, in turn, took an interest in neighborhood redevelopment and used its financial and political power to involve banks and developers to make improvements.

The Erasmus University Medical Center in Rotterdam, Netherlands is an example of a hospital failing to act as a catalyst for economic development. This was due in large part to the lack of available space in the urban core to accommodate secondary hospital services. Highlighted is the importance of coordination between all stakeholders in order to maximize
the potential of redevelopment. Stakeholders in this case and the MUHC case are similar: a university-related hospital and the local municipality.

The case of large-scale urban development projects found that UDPs have a tendency to be elite-driven without much local participation in decision-making. Important to the findings of this study was that generally UDPs are not politically and physically integrated within the city fabric. Perhaps more involvement and feedback from the community could remedy these problems. This key realization should seriously be taken into consideration for the case of the MUHC and its integration into the surrounding communities.

Finally, the case of Solin Hall is a direct example of McGill University joining the community of Saint-Henri. It shows the unequal power dynamics between community groups and the institution, which had the City on its side. But, importantly, it shows that McGill University used its power to provide a loan to the community for the creation of social housing. Also, the institution signed an agreement with the community that made a concerted effort to integrate the new development into the neighborhood as much as possible, minimizing the possibility of any negative impacts. Essential to this is the collaboration between the institution and the community, and the fact that the stakeholders worked together to create a specific plan for how impact could be minimized.

In sum, several significant issues should be remembered from these case studies that could be useful for community groups working with the MUHC administration. It has proven valuable for municipalities to get involved in redevelopment initiatives and the creation of new affordable housing. Municipalities can use specific tools and political power to encourage large institutions to help communities with redevelopment. In terms of the institution itself, many of the case studies have shown that institutions generally have certain financial capabilities which can be used to attain loans to help community groups that may not have the same financial abilities. Moreover, agreements signed between community groups have been successful when a specific plan of action is created for how the impact of a large institution on a community can be minimized. Finally, the cooperation of many different stakeholders has proven positive results for redevelopment and creation of affordable housing. The job of creating affordable housing should not only be left to community organizations: a combined effort by the institution, the municipality, local banks, private and non-profit developers, along with community groups can be quite effective.
Collaborative Partnerships: The Challenges Ahead

The MUHC has signed a partnership agreement with surrounding neighborhoods, but we question the effectiveness thus far of this agreement. This section will highlight the necessary components, potential pitfalls, and strategies to circumvent problematic partnerships. In addition suggestions are outlined for the MUHC and community groups to improve their collaboration.

Though not a great deal has been written about the long-term effects of mega-hospitals on surrounding communities, there is significant research into the type of partnerships that can be successful between large institutions and community groups. Our information comes primarily from two useful texts firstly Bluestone et al.’s “A Primer on University-Community Housing Partnerships” and Wiewel, Wim et al.’s “Community-University Partnerships for Affordable Housing” to which we are indebted.

The first question that must be asked in this type of partnership process is: what is the benefit to each party in working together? From the research, it is apparent that it is not necessary for stakeholders to agree on common goals or have a shared agenda to be able to work together. What is necessary is that each party can see a benefit to their institution from collaboration. The goals of a partnership with the MUHC are clear for community groups, in that they are attempting to protect local residents and maintain housing stock for at-risk populations in their neighborhoods. What, however can we present to the MUHC to convince its administration that it has an interest in a partnership of this kind? It may seem redundant to ask this question at this point in the proceedings as the MUHC has already signed a partnership agreement with the Inter-Neighborhood Coalition of NDG and the boroughs of Westmount and the Sud-Ouest. However, as this agreement does not bind the MUHC to anything more than a process of discussion to identify key goals that the MUHC can achieve by a more active participation, this type of questioning can be useful.

There are multiple reasons that large institutions can benefit from partnerships with the community. The hospital has a clear mandate of service to the community through healthcare, but traditionally this interest has been turned inward to research and caring for individuals at the hospital. This is potentially the biggest hurdle we have to overcome in this partnership process. In a study of Canadian hospitals’ community collaborations, the largest barrier identified is that both the funding and the mandate of hospitals is internally oriented (Poland 2005, 130). Especially in this time of fiscal austerity, where hospitals are facing constant budgetary and staff shortages, there must be strong incentives for a hospital to extend itself beyond this mandate.
There are other arguments for hospitals to work with communities. First, collaborating with the community is extremely beneficial for the public relations of any large entity. It gives a human face to the institution and demonstrates their willingness to discuss potential points of contention. Additionally, through the choice of location, the institution becomes a local player and this leaves them with a responsibility to the community. This argument can also be expanded to interplay with the hospital’s mandate of health care, as their participation in the local community will actively improve the quality of life and health in the surrounding area. There is also the argument that collaboration with community groups helps redefine the institution’s relevance to a wider society. A mega-hospital is especially relevant at a larger scale of planning and service provision and its potentially negative impacts will be felt primarily at the community level.

**Strengths of Partnerships**

Partnerships have many strengths that all participants can benefit from.

**Strengths for All Parties:**
- Working together can accomplish more that each partner can do individually
- Multi-agency partnerships provide a formal base for access to and negotiation with key actors
- Clarifies conflicts early on
- Provides a space to resolve problematic issues
- Moves all players beyond conflict to meaningful network and action
- Mutual empowerment
- Increased transparency
- Increased information
- Increased accountability
- Increased democracy and responsibility
- Development of new ways of thinking and achieving goals
- Creation of new vocabularies (less weighted by the political stance of individual groups)

**Strengths for Community Groups:**
- Institution lends legitimacy and authority
- Institution can back or secure loans at advantageous rates
- Have access to potential experts within the institution

**Strengths for the Institution:**
- Great public relations opportunity
- Community groups lend a local legitimacy and knowledge
• Partnership can introduce new energy and excitement
• Can contribute to public participation mandate
• Redefines relevance to wider society

**Barriers to Partnerships**

There are, of course, features of partnerships that hold back some organizations from entering into agreements.

**Barriers for All Parties:**

• Necessary trust can only be built over the long term
• Partnerships are evolving processes that need flexible definitions
• Different goals and priorities can lead to conflict

**Barriers for Community Groups:**

• Present day communities are less spatially bound than in the past and this can diminish local interest
• Internal rivalries and fissures

**Barriers for the Institution:**

• Generally oriented internally in terms of helping the community
• Characterized by large, complicated and slow moving bureaucracies

**Elements of Successful Partnerships**

In order to establish a successful, long-lasting partnership, certain characteristics need to be present.

**Necessities for Successful Partnerships:**

• Long term commitment
• Accountability for action and non-actions
• Flexibility: freedom to maneuver without compromising accountability
• Open declaration of interests and goals
• Overt acknowledgement of differences (in culture and goals)
• Clear benefits to all parties involved
• Clear/formal partnership structure and agreement
• Clear definition of membership, authority, accountability and mandate
• New administrative structure
Strategies for a Large Institution to Improve Housing within its Zone of Influence

Based on cases of other institutions working with community groups to develop housing, the following are techniques the MUHC could use in working with local community groups:

- Provision of financial contributions to community organizations to assist in the production or preservation of housing for community residents
- Backing or cosigning loans for the construction of community housing by local groups
- Provision of housing and planning assistance to leverage resources to benefit the community
- Participation in the direct production of affordable housing for community residents
- Initiation of Employer-Assisted Housing Programs for staff, usually involving financial benefits to the recipient to assist in home purchase or rental

Potential Financial Strategies
- Planning and housing funds from national foundations, and community-based foundations
- Federal, state, and local grants
- Tax-exempt bond financing
- Tax credits
- Internal funds

Detailed information on negotiation tactics was beyond the scope of our mandate. However, for basic introduction to conflict resolution and negotiation tactics please refer to the Appendix- Attachment A: Getting to Yes: Negotiating Agreement without Giving In.
The MUHC and Community Partnerships

Organization and Funding of the MUHC

The Liberal government of Québec was elected to power in 2002, on the platform of improving health and health care in the province. In the 2005-2006 Provincial Budget, health care is assigned $20.9 billion, an increase of $3 billion from the amount consecrated to this dossier three years ago (Québec 2005, 2). Within this ongoing commitment to healthcare, the province has agreed to construct two mega-hospitals in Montreal.

As of June 2005, the Government of Québec along with the Ministry of Health and Social Services, approved the $1.2 billion plan for the future MUHC, which will be located on the Glen Yard and the General Hospital sites. This budget is broken down into different financial commitments from different players. The Provincial government has committed $800 million to this project and the MUHC community has committed to a Capital Campaign with a target of $300 million ($200 million of which is destined for construction on the Glen Yard site). The remaining 100 million is not accounted for in the MUHC’s promotional documentation (MUHC, Redevelopment Project (n.d.)). This funding breakdown demonstrates the extent to which the MUHC is a provincial entity. It is therefore at the provincial level that pressure must be applied to secure collaboration in partnership as well as any extension of the hospital’s mandate.

Strategies for the MUHC to be a Good Corporate Citizen

The MUHC has taken the first step to collaborating with the surrounding community groups by signing a partnership agreement. This agreement, which can be found in full in the Appendix-see Attachment B, outlines 8 requirements for the ongoing partnership. Many of the clauses are focused on administrative structure and frequency of meetings. Additionally, the specific subjects of discussion are designated. The agreement also allows the stakeholders to determine additional rules during the first meeting. However, successful partnerships involve building trust through long term relationships (Wiewel et al., 2000, 37). This essential point is addressed in both the second and seventh section of the agreement which read:

2) The Joint Committee, following an active partnership model, shall establish an open and accessible dialogue opening the door to constructive and practical collaboration.

7) The signing partners to this agreement agree to combine their efforts in order to optimize the positive impacts of the arrival of the MUHC and its integration into the surrounding communities in the context of its mission and social-health mandate defined by the MSSS (Ministère Santé et Services Sociaux Québec).
Additionally, as part of the hospital’s mandate, it has committed to serve the community by:

- Encouraging and acting on input from the community at all levels
- Innovating and advocating to provide services that set standards for best performance across all levels of care
- Implementing changes based on continuous evaluation of outcomes
- Promoting the health of the population through advocacy and community education

(MUHC, Guiding Principals (n.d.))

This theme of community involvement is again present in the MUHC’s code of ethics where the Hospital states that it will “emphasize loyalty to its community” (MUHC, Code of Ethics (n.d.))

The above clauses, along with the MUHCS internal documentation, should be interpreted as long term commitments to work towards a strong, long term partnership and a conscious, careful integration into its new community.

All of this is very encouraging, however, the issue of accountability is not addressed in the partnership agreement. What kind of commitments to action will the MUHC offer? The MUHC has the opportunity to demonstrate its commitment to “emphasize loyalty to its community,” however it must take direct action and follow through on its commitments to “act on input from the community.” The first important steps have been taken and the MUHC has the opportunity to be a leader in a new form of community development in which large entities such as mega-hospitals have both internal and external commitments to best practices.

The following section outlines some potential avenues the MUHC could explore in a commitment to such innovation.

**Potential Characteristics of a Successful Partnership with the MUHC**

An effective collaboration cannot be created overnight. The primary ingredient in developing a successful partnership is *establishing an environment of trust and respect*, often needed
to overcome past suspicion and animosity. Patience and persistence are virtues without which these collaborations cannot be successfully realized.

The MUHC can lead both by example and by using its position of authority and prestige within the community to focus attention on its urban partners and specific issues such as affordable housing.

Large institutions engage in community-based housing development out of enlightened self-interest. Since the MUHC cannot easily relocate, a successful organization must be concerned about the condition of the community surrounding it. Attracting employees and users requires a safe and secure neighborhood and affordable housing within a reasonable commute for staff.

Through collaborations with local residents, community-based nonprofit organizations, and community-based developers, the MUHC can initiate, finance and/or direct programs that have a positive impact on the quality of life of the surrounding neighborhoods.

Where large organizations have used these techniques, they have become important and powerful instruments of urban revitalization, gaining support from the communities that surround them, and helping to build an attractive environment not only for their staff, but for neighborhood residents as well. The leveraging of institutional resources -- both financial and intellectual expertise -- can become a vital force for neighborhood stabilization and improve the quality of life in urban areas, all of which contributes to the general health and wellbeing of the population (Bluestone et al. 2003, 26-27).
Housing

Housing Programs in Québec: what tools are available?

A history of social housing policies of Canada and Québec could provide understanding about the distinct nature of social housing policies in Québec. The first three sections from the paper by Vaillancourt and Ducharme, “Social Housing – A Key Component of Social Policies in Transformation: The Québec Experience,” portrays the history and trends of social housing in Canada and Québec. After World War II, the federal government was heavily involved in providing social housing, mostly in the form of public housing. The federal government saw housing as a tool to stimulate the stagnating market. However, high cost and growing criticism about lack of tenant’s rights, made the government reorient their strategy to encourage more co-operative or non-profit housing. The National Housing Act was amended to provide more diverse types of housing to households with different income levels. Federal financing programs for co-operative or non-profit housing peaked in 1985, but started declining with rising costs – due to high interest rates. The budgets of the Federal government for social housing dramatically declined, and the government gradually withdrew from financing social housing in the 1980s. Finally, in 1993, the budget from the federal government disappeared, and in 1994, the government announced its intention to transfer administrative responsibility to the provincial governments.

Québec was also influenced by strong federal government intervention at the beginning of its history of social housing provision, but the major responsibility shifted to the provincial and municipal governments in the 1980s. The strong role of the provincial government and social movements has shaped the distinctive nature of social housing provision in Québec (Vaillancourt and Ducharme 2001, 12). In 1986, Société d’Habitation du Québec (SHQ) became a sole provider of social housing by the agreement with the Canadian Mortgage Housing Corporation (CMHC). The provincial government started creating its own programs and budgets with a more decentralized system which allowed input from the third sector and reflected local needs.

The current social housing programs of Québec can be divided into two principal aims:

The Construction of New Housing
The first is to provide affordable housing units by construction of new housing, conversion of non-residential units, and renovation of existing residential units funded principally by two programs:

AccèsLogis
AccèsLogis is the financial assistance program to build social housing for low- and modest-income households. It promotes the partnership among two different participants: public and third sector (non-profit organizations, cooperatives and community organizations). Among the capital cost budget, 50% is from federal and provincial sources (CMHC and Québec Housing Corporation), 15% is from the City of Montreal and 35% comes from a mortgage by the non-profit owner that is guaranteed by the Québec Housing Corporation. Half of households pay a near market rent and the other residents, who are low-income households, will pay 25% of their income as rent. To be eligible for funds, a project should involve purchase of lands or existing buildings, and construction, if applicable. It emphasizes the financial contribution from the community, or non-financial contributions such as gifts of land or buildings or a tax credit as one of the qualifications. The financial assistance takes the form of a loan that becomes a subsidy once the organization has met the conditions of the operational agreement signed with the Société d’Habitation du Québec.

Four technical resource groups (TRG) – Atelier Habitation Montréal, Regroupement des organismes du Montréal technique pour le logement, Bâtir son quartier and Groupe CDH – are currently working with the City of Montreal as part of the AccèsLogis program. They provide assistance and expertise in creating co-ops and non-profit housing organizations.

**Affordable Housing Québec (AHQ)**

Affordable Housing Québec programs (AHQ) are available for two different targets: private components, and social and community components.

**The Private Component** provides financial assistance for private residential developers to build affordable housing units for moderate-income groups. AHQ for private components applies to municipal territories. SHQ will be a prime contractor to manage the program in cooperation with participating municipalities. Half of the funding comes from the federal government, 35% from the provincial government, and 15% from the municipalities. SHQ creates basic criteria, and a municipality must create its own program, adopt the program through a by-law and get it approved by SHQ. Financial assistance will be provided with a fixed amount according to the location and type of dwelling produced. To qualify for funding, the projects should be located in an urban area with rental vacancy rates of below 3%.

**The Social and Community Component** applies to the entire Québec territory. Whereas renovation projects can be carried out in the entire territory, construction and conversion of units can be carried out only in municipalities where the housing vacancy rate is less than 3%. The maximum grant covers 75% of the cost, 60% of
which comes from the federal and provincial governments and 15% comes from the city. This program is administered by SHQ. As an example, a new construction project in Montreal could receive $76,800 for a 2 bedroom unit.

**Making Housing Accessible for Low-Income Households**

The second social housing program is to make housing more accessible for low income households by empowering the residents on an individual basis.

**Shelter Allowance**

A shelter allowance program is paid each month by a check or direct deposit. To be eligible, the individuals should be 55 or older, one partner in a couple should be aged over 55, or families should have at least one dependent child.

**Community and Social Initiatives in Low Rental Housing**

Community and Social Initiatives in Low Rental Housing is designed to help people living in low rental housing. It encourages the residents to take an active role for their own environment, and emphasizes community life. The projects are classified into four categories, depending on the amount of application. The maximum amount of a grant is $20,000. (Société D’Habitation Québec, (n.d.))

**Co-operative Housing**

Co-operative housing is a legal association formed by the residents of a building to collectively buy and run their building. There are 1 093 coops in Québec offering 22 019 housing units (Co-operative Housing Federation of Canada, Just the Numbers, (n.d.)). Co-operatives are resident-owned and democratically controlled. The non-profit nature of the coop, combined with the work done by residents keeps rents low and affordable. In a 2003 CMHC study, co-op housing was found to be 14% less expensive to operate than municipal or private non-profit housing (Co-operative Housing Federation of Canada, Just the Numbers, (n.d.)). Within the coop structure there is also the potential for low-income households to pay only a limited portion of their income (25-30%) in housing charges. Approximately half of current co-op residents pay monthly charges geared to their income with the government paying the difference (Co-operative Housing Federation of Canada, Just the Numbers, (n.d.)).

**Table 6: Strengths and Weaknesses of Co-operatives:**

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Democratic Governance</td>
<td>Needs politically active individuals</td>
</tr>
<tr>
<td>Affordability</td>
<td>Not for the poorest citizens</td>
</tr>
<tr>
<td>Security of Tenure</td>
<td>Limited number of units per building</td>
</tr>
<tr>
<td>Creates Community</td>
<td>Difficult to get funding</td>
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</tbody>
</table>

(CMHC, Guide to Cooperative Housing, 2)
**Green Affordable Housing**

Recent studies have shown that green buildings have a modest initial cost premium, but long-term benefits exceed the incremental capital costs (Bradshaw et al. 2005, 9). Green affordable housing is a viable option that community groups and the City of Montreal should seriously take into consideration. According to the study by Bradshaw et al. (2005), using a life-cycle approach (where both capital and operating costs are considered over the expected life of a building), green affordable housing is more cost effective in net present value terms than conventional affordable housing.

**Rent Control in Québec: the Regie de Logement**

Tenants in Québec are fortunate enough to benefit from rent control. The idea behind rent control is to prevent abusive rent increases while preserving the housing stock. The rent control formula in Québec is based on cost recovery: if a landlord’s heating, maintenance, tax or insurance costs rise, they can be passed on to the tenant. Major repairs and renovations can also be recovered, but only in the long term. The Québec Rental Board (Regie de Logement) releases an estimation based on the Regulation Respecting the Criteria for the fixing of rent of rent adjustments to which landlords and tenants can take recourse if they cannot reach an agreement otherwise. The basis on which a rent increase is decided is a) an increase in operating costs; b) major repairs and improvements made on the building in the past year.

The Regie de Logement sets the following formula for calculating annual rent increases called the “Rapid Estimation of Rent Increase” in 2005:

- Dwelling heated by the tenant: 0.8%
- Dwelling heated by the landlord, with electricity: 1.1%
  - with gas: 0.5%
  - with oil: 2.0%

In terms of major repairs, a 3.9% adjustment rate is used. For example, if a landlord spent $1,000 on renovations during the past year, that means he or she is entitled to raise the rent by $3.25 per month, or $39 dollars a year. This amount is the maximum and is to be divided among all units benefiting from the repairs (Regie de Logement, 2005).

Having knowledge of this formula is the first step in assuring that landlords do not succeed in exhorting exorbitant rent increases from their tenants. Similarly, tenants must be aware of the regulations of the Regie de Logement concerning repossession, to assure that they are not wrongfully evicted from their lodgings. In Québec, the law grants the tenant the right to remain in their dwelling as long as they wish, provided that they obey the terms of the lease. The “Right to Repossession” is the only exception to this rule.
Who has the right to repossess? The only person with the right to repossess a dwelling is the owner of the building. The landlord may repossess a dwelling for himself; for his father, mother, son or daughter, for any other relative or person connected by marriage or a civil union of whom the lessor is the main support, or for a spouse of whom the lessor remains the main support after a separation from bed and board (by judgment) or divorce or the dissolution of a civil union.

The landlord must notify his tenant in writing (the Obligatory Notice) that he intends to repossess the dwelling. The notice must include the following information:

- The date of the repossession (usually at the end of the lease);
- The first and last name of the person who will live in the dwelling;
- The degree of relationship or his connection to this person (e.g., son ex-spouse)

This notice must be received at least six months before the end of the lease term in order to be legally binding, i.e. if the lease comes up for renewal on July 1st, the notice must be written and received by the tenant by January 1st. Additional information on the exact timing on the Repossession Procedure can be found online at http://www.rdl.gouv.qc.ca.

A recent CMHC Report: “Comparison of Provincial and Territorial Rent Practices” helped highlight the fact that when compared to the rest of Canada, the Regie de Logement provides considerably more protection to renters in the Province of Québec then renters enjoy elsewhere.
Montreal’s Housing Policy
In Montreal’s Master Plan, the city has set the goal of creating 60,000 to 75,000 new homes by 2014. Included in this goal is that 30% of these homes will be affordable housing. Of this 30%, 15% will be social and community housing and 15% will be privately-built affordable housing.

As part of the strategy to achieve the above goals, the City of Montreal has recently (2005) elaborated a new housing policy of all new construction on the island. This document, called “Habiter Montréal: Stratégie d’inclusion de logements abordables dans les nouveaux projets résidentiels,” is a policy document outlining the city’s position on new housing and the tools available to achieve their desired outcomes. Its contents will be outlined in the following section and its strengths and weaknesses assessed.

Montreal’s Stance – affordable housing is key
The logic of Montreal’s municipal government is based in fostering a social mix throughout Montreal’s communities. The island of Montreal is home to 75% of all the rental property in the greater Montreal area (Habiter Montréal 2005, 4). This comes at a price and it is the amount of affordable property available for purchase on the island. Due to this lack, people at the beginning of their careers, especially young families looking for property that fits their incomes, city residents are driven off the island to where housing property is cheaper. The Institut de la statistique du Québec (ISQ) noted that from the 1st of July 2001 to the 30th of June 2004 there has been a significantly greater migration from the island of Montreal than found in other regional centers in Québec. Approximately 60,000 more people more left the island, 30,000 between the ages of 25 to 39 and 18,000 under the age of 14 (Habiter Montréal 2005, 4). The report contends that the loss of these young, talented people at the beginning of their careers, ready to invest in a community, is a significant loss to the city both at an overall citywide economic level and at the level of specific community vitality. This out-flux leads to the situation in areas such as Saint-Henri, where we find a great polarity between the very rich, who can afford condos along the Lachine Canal and the very poor living in rental or social housing to the north. The Habiter Montreal report adds that an agglomeration of poverty has a negative effect on an individual’s ability to improve their conditions (Habiter Montréal 2005, 6). They assert mixed communities have the ability to offer a wider variety of services, as there is a wider market base to support them. Additionally, communities with a diversity of housing stock, allow individuals to stay in their community should their life-style change, i.e. though divorce, a new child or simply aging.

For the above stated reasons, the Montreal municipal government’s housing policy favors mixed developments with a range of housing types. The Montreal Housing Plan (Habiter
Montreal, 2005) outlines seven strategies to foster the inclusion of affordable units in new developments, all of which are summarized below.

1. **Optimizing the housing grant programs**
A significant problem in the long term planning of social and affordable housing development is the inconsistency of the grants made available by the provincial government. Additionally, the provincial government does not consider the situations faced by large cities as different from those elsewhere in the province; therefore grants are accorded without consideration of the differences in cost caused by issues such as high land prices and/or brown field remediation. Some things the City will do include:
   - Assure the long term consistency in provincial grants
   - Make the provincial government recognize the real cost of affordable housing in Montreal
   - Designate money in the city budget specifically for affordable housing grants

2. **Contributing municipal land holdings**
The City will lead the way with the development of municipal land by doing such things as:
   - Include at least 30% affordable housing in all developments on former municipally-owned land
   - Evaluate buying and renovating existing building for social or community housing
   - Continue acquiring land in areas where the city has minimal holdings
   - Review the city’s policy on municipal land sales

3. **Inciting large public landowners to follow the city’s lead**
Provincial and federal ministries, crown companies and other public institutions must dispose of excess land. The City will strive to have them insist on diverse developments in their redevelopment by initiating the following:
   - Increased communication between the city and large public land owners to identify excess lots
   - Agreement from these groups that they will enforce these policies at the time of sale
   - Evaluation of a change in zoning regulations or Master Plan regulations regarding developers’ inclusion of affordable housing.

4. **Use the existing planning tools to their full capacity**
The boroughs have full control over zoning, project approval and issuing of building permits, however, the City of Montreal has the power to overturn the decision of the borough if it sees fit (as per section 89 of the Montreal Charter) (Lechaseur, 1). The borough therefore has the potential to stop building of “undesirable” developments by not making zoning changes and not extending services, such as roads and sewerage to yet un-served areas. Other initiatives the City will consider include:
• Changing density, height and architectural allowances, to make inclusion of affordable housing financially viable
• Re-evaluation of the parking requirements for new construction

5. **Adapt the services already offered by the city**
Consolidate the administration of new social and affordable housing development under one para-municipal agency, the SHDM (la Société d’habitation et de développement de Montréal).

6. **Continue research, development and communication**
As part of its housing program, the City plans to:
• Strengthen partnerships with research institutes
• Study potential funding sources
• Study rooming houses
• Increase publicity of existing programs

7. **Assure monitoring of the impact of this strategy**
In order to ensure that the proposed program can respond to changes in the housing market or failures to achieve the desired results, the City plans to:
• Collect data on the impact of the different strategies
• Present a yearly report on the programs’ impact

**Criticism and Questioning**
The City has been severely criticized for this housing policy, as there are no legal recourses to force developers to include social or affordable housing into their projects. This kind of “inclusionary zoning” is not permitted under the City’s existing Charter. To include these types of tools in the City’s arsenal, the Provincial government would have to pass a law modifying the City’s Charter. This is a politically loaded subject with community groups and developers of different points of view. When interviewed, Sylvain Theriault, an urban planner with the Sud-Ouest borough and former member of Montreal’s Housing Department, explained that this modification of the Charter was one option proposed in the early development stages of the above policy (Thériault, personal interview, October 2005). However, the final political decision was not to ask the Province, though the Province was amenable, for a change to the Charter and to work with the tools available.

The final strategy in the plan, as it stands now, is that of monitoring. This step, Thériault explained, is to provide feedback and support for a modification to the Charter if the existing plan proves ineffective. However, he did express concern that tools such as inclusionary zoning need a specific social and political climate to be effective, namely a strong housing market, and by the time Montreal implements the policy, the current trend may have passed.
In light of the lack of legal requirement to include affordable or social housing in private developments there is the argument that the City should develop only social and affordable housing on municipal lands that are available for development. However, when questioned on the subject, Thériault explained this is contrary to the City’s stated policy of diverse communities and simply creates a greater segregation and ghettoisation of people from different income brackets.
Planning Tools for Affordable Housing Provision

There are many strategies municipalities can use to encourage affordable housing development. This section outlines some of these strategies and where possible, provides examples of municipalities that have employed these tools.

Removal of Barriers to Affordable Housing

Within many communities, including Montreal, there are many ‘exclusionary’ zoning regulations that may prevent the development of a diverse housing stock. Examples of exclusionary zoning requirements include:

- Prohibitions on multi-family housing, attached homes;
- Minimum lot size, square footage and setback requirements;
- Prohibitively expensive design requirements

Communities can take a proactive role in promoting long-term housing affordability by encouraging more ‘inclusive’ zoning codes. Examples of ‘inclusionary’ zoning include:

- Requirements that every community set aside a certain percentage of its land to be zoned for multi-family housing;
- Requirements for minimum density to ensure that land set aside for multi-family housing cannot be developed into single family homes;
- Requirements that all developments of a certain size include a portion of affordable homes (see inclusionary housing requirements, tool #4) (Harmon 2004, 6)

Revision of Codes and Permitting Processes

A related strategy is to simplify the codes that govern development and the process by which permits are issued. This can have the effect of reducing the cost of housing, as less time spent trying to attain permits will have the effect of lowering ‘soft costs’ of a given development. Municipalities should consider creating a zone for enabling affordable housing developments to move forward without requiring any special permits, etc. In some places, special ‘fast track’ permitting processes are set up for affordable housing as an incentive for its production (Harmon 2004, 7).

Transfer of Development Rights

This tool essentially transfers development from one site to another in order to preserve a valued resource, or to intensify development where it is desired. This is accomplished by creating a relationship between two sites, which are typically owned by different people. In this relationship, the owner of the site zoned for development that is more intense than
would be desirable according to the public agenda, sells his or her right to develop the property and commits to retain its current use. In return, the owner receives a cash payment from the owner of the other site, one that the public agenda says should be developed more intensely than is currently permitted under the zoning code.

Development rights typically take the form of additional height, floor area or number of units permitted. The owner of the site purchasing these development rights can use them to increase the intensity of development on the site. This strategy can be used to preserve existing affordable housing in areas that are developing at higher densities (particularly downtown cores).

**Example of TDR to promote production of affordable Housing – Portland, Oregon.**

A program in Portland allows existing affordable housing sites to sell the difference between their current floor area ratio (FAR) and what is allowed under the zoning codes to owners of other downtown sites who want to build taller buildings than are normally permitted. By accepting the money for the development rights, the affordable housing provider commits to keeping the site in question as affordable housing in perpetuity. This serves the dual objectives providing an influx of cash to the affordable housing, thus removing the threat that it will be converted to other uses, while on the other hand encouraging higher density development downtown (Harmon 2004, 7).

**Inclusionary Housing Requirements (Inclusionary Zoning)**

The most basic approach to inclusionary housing policies is to require that a certain percentage of housing units in any development greater than a certain size be priced to sell or rent to households at or below a certain income level. In this scheme, no cash subsidy is provided to developers for fulfilling the inclusionary housing requirement, but incentives of some form are usually included. These might include: density bonuses, planned unit development type flexibility, the allowing of different types or smaller lots than are usually permitted, a priority permitting process, etc. There are two main approaches to Inclusionary Zoning that are employed in North America. The first is the mandatory approach, which is widely used in the United States, and relies on a zoning bylaw that lays out a rigid formula applicable to all developers in that specific zoning category (CMHC 2002, 8). In general, Canadian municipalities tend to use a negotiated approach. In this context, planners rely on broader policy (i.e. from an official plan, etc.) and use this as the basis of negotiating inclusionary requirements with developers on a site-by-site basis. An important caveat, particularly relevant in the case of Montreal is that generally, inclusionary housing policies that are not mandatory (i.e. they simply offer incentives for including more affordable housing) typically do not end up producing very many units.
Example of obligatory inclusionary housing requirements – Montogomery County, Maryland

Touted as the most successful inclusionary zoning program in the U.S., Montogomery County instituted an ordinance in 1974 which required 15% “Moderately Priced Dwelling Units” in all developments exceeding 50 units. By 1999, this ordinance had created nearly 10,000 affordable housing units (CMHC 2002, 9).

Example of obligatory inclusionary housing requirements – City of Vancouver

Social housing 20%, implemented in Vancouver in 1998, requires that all major rezoning of lands to multi-unit residential zones include 20% social housing. This policy has created to date, a capacity for 2,670 social housing units, of which 800 units have received funding and are built or under development (CMHC 2002, 9). Dansereau et al. (2000) have commented that this policy does not obligate developers to provide the affordable housing as part of the development that required the zoning change, rather, in many cases they have created the affordable housing at a different site. In their opinion, this does not necessarily contribute to furthering social mix at the neighborhood scale (Dansereau et al. 2000, 80).

Key components of inclusionary housing policies to ensure maximum potential for affordable housing:

- Permanent affordability requirements must be attached to the affordable homes
- Programs should require that a certain percentage of the affordable homes are offered to the local housing authority or non-profit organizations
- Each time an affordable unit changes hands, it must either be sold or rented to an income-eligible household
- The affordable units cannot all be one bedroom units

The role of community land trusts (CLT’s) in implementation of inclusionary housing policies:

- Stewardship: CLT’s can serve as the mechanism by which permanent affordability for all the units is preserved
- Leverage of Resources: CLT’s can be the conduit through which other subsidies are obtained to make some of the homes even more affordable, i.e. further lowering the price of units beyond what is required by the inclusionary zoning
- Educator and Marketer: CLT’s can do the marketing of the affordable homes, help ensure that lower-income families learn about becoming home-owners and maintain the waiting lists for quality buyers and renters. (Harmon 2004, 10)
Permanent Affordability Requirements

Local, regional, provincial and federal housing programs contain a variety of criteria for the awarding of funds, surplus land and buildings, tax abatements, fee waivers, priority permitting, etc. These criteria could include program wide requirements, set asides or preferences for housing (both rental and homeownership) that is permanently affordable. This could have the effect of increasing the flow of funds specifically to support CLT’s and other housing models that diversify the housing stock, prevent involuntary displacement and ensure access to housing by low income people in our communities in the long term (Harmon 2004, 12).

Preference for Displaced and Local Residents for Public Funding

In situations where government programs are contributing to the displacement of local low-income residents, preferences could be established in publicly funded housing programs that prioritize long-term residents and people already displaced. In practical terms, this means if two equally qualified persons apply for a housing subsidy, one from outside the area being gentrified and one from the area, priority will be given to the person who lives in the neighborhood (Harmon 2004, 12).

Linkage Fees

Linkage fees require that the developers of office buildings, or other commercial, retail or institutional uses, either build affordable housing or pay into a housing trust fund to develop affordable housing for lower-income people. This tool is particularly relevant in areas where a new development will be creating an increased need for housing (Harmon 2004, 13). This tool is particularly relevant to the case of the MUHC, as the influx of new employees who will seek housing in Saint-Henri and NDG, will create housing pressures for existing residents. Interestingly, a recent report by the CMHC, found that in Canada and the US, linkage programs are the most successful examples of all the regulatory initiatives in terms of fees generated and housing produced (CMHC 2002, 19).

Examples of linkage fee programs in Canada: Whistler (BC) and Banff (Alberta)

Both Whistler and Banff have linkage fee programs to fund low-income housing – both are modeled on the US approach, in which they impose a levy on commercial development in order to help meet the increase in demand for new housing as a result of that new development (CMHC 2002, 22).
Speculation and Land-Gain Taxes

The central premise of this tool is that speculators who buy homes in a low- or moderate income community, hold the property for a very short time, make few improvements on the property, and sell it again at a significant profit, are therefore contributing nothing to those communities. To the contrary, they drive up valuation taxes and prices, contribute to the displacement of existing residents, and create significant pressures on both individuals and families.

A speculation or land-gains tax would apply to the profit between the sale and resale of the same house or building, pegged to the amount of time that the property is owned. This would discourage the rapid ‘turnover’ of real estate for a quick profit, instead encouraging the long-term ownership of property. A speculation tax is intended to return to the community a significant portion of the excessive value of any short-term gains made by rapid turnover of real estate. Dedicating these revenues to the creation of permanently affordable housing would further mitigate the inflationary effects of speculation (Harmon 2004, 14).

Example of speculation and land gains tax – State of Vermont

In the late 1980’s, Vermont was concerned about the effects of rapid increases in land prices due to out-of-state speculators and buyers. Therefore, the State adopted a graduated tax on the profits from land sold within six years of purchase. This tax has had the intended effect of slowing the conversion of prime farmland into second-home use (Harmon 2004, 15).

Condominium Conversion Ordinances

This tool is used to regulate the conversion of multi-family rental housing to ownership, a process that almost always results in the displacement of existing tenants and a significant increase in the cost of housing. The purpose of such ordinances goes beyond requiring the replacement of affordable rentals that are being converted to condominiums. Instead they require that a percentage of the condo’s created from affordable rentals be affordable to tenants that currently occupy the homes. Additionally, regulations may also be put in place which:

- Require that tenants receive advance notification about the conversion;
- Provide existing tenants with the right-to-buy if their income allows them to qualify;
- Limit the total number of rental units that can be converted in any one year to condominiums that are unaffordable to the existing residents, unless a sufficient housing stock clearly exists to meet the needs of those displaced tenants (Harmon 2004, 16)
Example of condo conversion ordinance: Montreal, Québec

In Montreal, there is legislation that limits the conversion of rental properties into divided co-ownership if the vacancy rate is less than 3%. Exceptions are made, however (RESO 2002, 95).

No-Net-Loss Mandates

This includes a commitment by the City of having the same amount of affordable housing at the same levels of affordability in a given neighborhood in the future as exists currently. This tool is particularly useful in urban renewal districts. They make the City responsible for implementing programs and policies to protect current residents from the displacement risks inherent in its urban renewal program (Harmon 2004, 16).

Example of a no-net-loss mandate in Seattle, Washington, U.S.A.

The ‘Housing Preservation Ordinance’ in Seattle mandates replacement of any affordable unit lost through demolition, zoning changes or conversion (RESO 2002, 102).

Redevelopment of Brownfields

Brownfield sites are sites (usually vacant) in existing communities that are, or are perceived to be contaminated. They are often old industrial sites. In many places, governments are taking partial responsibility for cleaning up these sites, investing public dollars to clean them up and make them ready for development. In Québec, the government program REVISOLS provided funding for the decontamination of existing brownfields.

Community Land Trust involvement in this process could include:

- Identifying existing brownfields that should be redeveloped
- Creating community consensus about what should be done with the sites
- Advocating for public (and or private) investment in cleaning up the sites
- Advocating for the redevelopment of sites according to a community based plan
- Being directly involved in the redevelopment, including acquisition and stewardship, of the land in question.
Land Banking and Community Land Trusts

Land banking is a tool used by government and non-profit organizations to preserve sites for affordable housing and other community needs, in areas where land is currently inexpensive but where price inflation is likely. Examples of locations for this include places starting to gentrify and places where significant government or private investment is planned. Securing significant parcels of land before land prices escalate too drastically, make affordability possible with fewer subsidy dollars. A Community Land Trust is a non-profit entity that undertakes land banking on behalf of the community.

Key features of Community Land Trusts include:

- Non-profit status: CLT's are incorporated as a Society or a Corporation;
- Democratic control: CLT’s are typically formed at the grassroots by community organizations, they are controlled by their members and governance of a CLT is typically done by a Board of Directors elected by the members;
- Dual Ownership of Land: CLT’s have a distinctive approach to affordable housing which separates the ownership of the property (land) from the ownership of individual dwellings;
- Perpetual Affordability: CLT’s ensure that housing remains affordable in perpetuity by limiting the resale value of the homes on CLT land (CMHC 2005, 4).

Example of a successful Community Land Trust in Canada: Communauté Milton Parc, Montreal

The Milton Parc Community was created in 1987 to support the joint ownership of land by 25 housing cooperatives and non-profit corporations. It is the largest cooperative neighbourhood in North America. CMP is composed of 16 housing cooperatives, 6 non-profit housing corporations, 1 community organization, 2 commercial entities and 1 community development organization. Today, CMP houses more than 1,500 low- and moderate-income residents from more than 50 different countries in 616 multi-residential units spread over six city blocks (CMHC 2005, 35).

Density Bonusing

This tool, also referred to as incentive zoning, basically allows zoning requirements to vary in exchange for provision of certain facilities and services that are of benefit to the community. Typically, the types of facilities include: daycare, recreational facilities, community centers or affordable housing. Use of this tool generally involves developers being permitted additional floor area or density (and thus more potential revenue) in return for the provision of an identified service or facility which could include housing (CMHC 2002, 28). This is an incentive based voluntary contribution, rather than a compulsory
requirement. An important caveat is that this tool requires a high degree of economic activity and a strong real estate market.

A Canadian example of density bonusing – Toronto, Ontario.

The City of Toronto Official Plan contains policies that allow the city to seek public benefits from development applications that include requests for increased height and density. Such benefits might include social housing, non-profit community facilities, cultural and institutional facilities, heritage preservation and parks. The means by which these benefits are secured is through an agreement pursuant to Section 37 of the Ontario Planning Act. The Official Plan demands that there be a relationship between the cost of providing for the public benefit and the value of the increase in height or density (CMHC 2002, 31).

Alternative Development Standards

Alternative Development Standards (ADS) are flexible planning and engineering standards that provide an alternative to current standards used for design and construction. Typically, they might include standards relating to lot sizes and frontages, the siting of houses on lots, shared utility trenches, right of way widths and street pavement. The obvious appeal of ADS is that their implementation reduces the net cost per dwelling unit (CMHC 2002, 37).

A Canadian example of ADS – Bois Franc, Ville St. Laurent

Bois Franc is an innovative example of brownfield remediation within an older suburban municipality of Montreal. It is a 200 hectare site on which to date 1,000 units have been completed. It will eventually house 8,000 people. In terms of applied ADS, lots are smaller and streets more narrow than in the typical suburb. Additionally, setbacks are smaller (ranging from 1.5-5 m) and all parking is provided underground. The development has a wide range of housing types including row houses, duplexes, triplexes, quadruplexes and condominiums. Zoning for the site is flexible, with a range of densities, heights and building types permitted within each zoning category (CMHC 2002, 43).
Best Practices for Communities Undergoing Neighborhood Change

This section will address strategies that have been used by communities in order to best manage the neighborhood changes that accompany the gentrification process. These comments provide a summary of a report by NeighbourWorks America in which five case studies were explored, looking specifically at the impact of gentrification on residents, community-based organizations and community development corporations, in order to suggest best practices from the community sector. From our experience with community groups in Saint-Henri and NDG, it seems that many of the strategies outlined below are already being employed in various manifestations. Nonetheless, it is important to look at what other communities facing similar challenges are doing to mitigate the negative impacts of gentrification.

The first conclusion of the report is that community organizations play a key role in mediating conflict as a result of neighborhood change. Four determinants of a communities’ ability to successfully manage neighborhood change were identified: community cohesiveness, community collaboration, community building and organizing and an articulated response to gentrification (NeighbourWorks 2005, 68). The report found that in communities where all four factors were present, the community was better able to manage the issues that arose as a result of gentrification, in a way that responded to the needs of long term residents.

Community cohesiveness occurs when a level of trust and rapport is developed among community residents. Generally, it develops over time, as residents come to know each other better and trust one another in how they relate to community issues (NeighbourWorks 2005, 69). Community organizations are key catalysts in developing community cohesiveness. Examples of types of activities that community-based organizations (CBO’s) facilitated and encouraged were: monthly networking sessions allowing residents to engage and interact with neighbors they might not otherwise meet. Another example was in the Shaw community of Washington, D.C. where the local CDC implemented a popular education program – Shaw Education for Action (SEA)- in order to do door to door education campaigns to bring awareness of and inspire action among residents in relation to issues surrounding gentrification (NeighbourWorks 2005, 56).

The degree of successful community collaboration is also a key determinant in how communities manage change. This refers to building strong collaborative relationships both within the immediate neighborhood as well as in the broader community. Collaboration brings various perspectives and resources which can help a community determine and realize its vision (NeighbourWorks 2005, 70). Successful community collaboration is characterized
by a high level of collaboration between CBO’s. For example, in the Reynoldstown neighborhood of Atlanta, CBO’s came together to host a series of job fairs for community residents and to organize a community festival called the “Wheelbarrow Festival.” This festival served not only as a vehicle for economic activity in the area to provide funding for much needed social programs, but has simultaneously showcased the unique strengths and talents of residents, reinforcing community unity (NeighbourWorks 2005, 43).

**Community building and organizing** also play key roles in mitigating the negative effects of gentrification. **Community organizing** is often issue focused: i.e. the process of rallying the community around a challenge facing the community, such as locally unwanted land use exemplified in the protests surrounding the proposed Casino in Pointe Saint-Charles. Similarly, in Jamaica Plains neighborhood in Boston, the community organized around locally unwanted land-use in its attempts to prevent some of the only vacant land left in the neighborhood being taken over for a Kmart. They had very strong community cohesiveness in their opposition to the project and were actually able to defeat the proposal and instead construct a new community center. **Community building** is often more day-to-day in its efforts, bringing residents together around shared interests such as community gardens or neighborhood park improvement committees. These activities are key in terms of reinforcing the impression that resident contributions to community building are essential and encouraged.

It is also very important that a **community undergoing gentrification has an articulated response to it.** In the case study communities, those who were most successful in managing neighborhood change were those that had implemented strategies to impede some to the possible negative outcomes (NeighbourWorks, 2005, 71). For example in the Historic District neighborhood of Atlanta, one of the guiding principles of the CDC’s work has been the non-displacement of original residents. Similarly, in Reynoldstown, Atlanta, the CDC’s first goal was to renovate the homes of elderly residents to ensure that those most vulnerable to displacement would be insulated from its impacts (NeighbourWorks, 2005, 71). These organizations were able to identify negative aspects of change and ensure that they responded in such a way that certain characteristics of the original community would not be compromised by that change.

Specific techniques for managing neighborhood change in gentrifying communities fall into three categories: 1) those that help community residents to understand and navigate gentrification; 2) those that enhance cohesiveness and create neighborhood pride; and 3) those which build individual skills of community members. These techniques are outlined briefly below.
Helping Residents to Manage and Navigate Gentrification

- CBO’s need to look for ways to engage community residents to proactively influence their collective and individual futures
- Techniques commonly used in the sample communities focused on information sharing through community meetings, door to door organizing and neighborhood planning sessions

Enhancing Cohesiveness and Creating Neighborhood Pride

- Connecting residents to each other and the community is essential in order to help neighbors come together in ways that celebrate their common interests
- Techniques for improving cohesiveness used by other communities include CDC sponsored ‘Coffees on the Corner’ which invited community residents to join one another for coffee and pastries in the park on Saturday mornings; or in the case of Reynoldstown, the Wheelbarrow Festival allows the community to annually celebrate the talents and skills of the community, through music, dance and other performing arts

Building Individual Skills of Community Members

- Communities need to employ techniques that enhance individual capacities of the residents in order to improve residents’ chances of staying in the neighborhood as change unfolded
- Techniques used by various communities to build individual skills include: in the case of the Shaw neighborhood of Washington, D.C., the local CDC owns a number of small businesses whose purpose is to empower Shaw residents; in Jamaica Plain, Boston, Jobs for Jamaica Plain assists lower income residents with employment counseling and job training; in the Atlanta Reynoldstown neighborhood, the CDC partnered with other agencies to hold job fairs to introduce employers in the area to new potential employees, Reynoldstown residents (NeighbourWorks, 2005).

Additionally, the work: “Dealing with Neighborhood Change: A Primer on Gentrification and Policy Choices,” (Kennedy & Leonard 2001, 29-39) outlined 10 steps to creating a stronger community. A summary of these steps are outlined below:

- **Know the Context** – i.e. the growth dynamics of the city and region, in order to determine the extent of gentrification already underway;

- **Anticipate Pressures** – increase the regional, city and community understanding of the dynamics of gentrification by conducting analyses and research;
Get Organized – at the regional, city and community levels in order to mitigate adverse impacts of gentrification

Develop a Unified Vision or Plan – i.e. for jobs and/or housing balance at the regional level, for economic and housing opportunities for residents at the city level, and for neighborhood stability and viability at the local level;

Implement Regulatory and Policy Fixes – careful consideration of the social and economic dynamics are necessary in using planning tools to mitigate gentrification (see previous section for a sample of tools available). Careful review of the implementation of policies and regulatory fixes as well as their implications for vulnerable residents are essential in order to assure that policies are actually leading to equitable development and not increasing dislocation and displacement;

Maximize Public Assets for the Public Good – public assets and aging public facilities (e.g. city-owned land and school buildings) can be key tools to help mitigate gentrification. These assets need to be decoupled from market price pressures and used to facilitate development which is consistent with the neighborhoods vision;

Educate Residents About their Legal Rights and Other Options – obviously, lack of education about landlord/tenant laws can significantly increase the chances that tenants will suffer negative consequences of gentrification, such as displacement. Further, these circumstances serve to actually quicken the pace of gentrification as developers are drawn to take advantage of more vulnerable populations;

Improve the Public Education System – typically the influx of gentrifiers into working class city school districts does not appear to have the effect of increasing school quality. However, if new residents focus on enhancing local school quality, the benefits would be felt not only by new students but also long-standing residents in the area. Of course, improved education may enhance the life chances of original residents and increase their ability to stay in gentrifying neighborhoods;

Prepare Groups to Negotiate – effective negotiation among community groups, developers and public sector officials is essential to increase the likelihood of collaboration for successful revitalization efforts. For example, strong negotiation can assure local job creation, which might improve a community’s fiscal and physical environment. This may in turn lead to a greater ability to mitigate the negative impacts of gentrification;
Create Forums to Unify the Gentrifying Community – the influx of new residents to a community, causes neighborhood dynamics to change. Forums need to be created in order to address these changes and try and create spaces where old and new residents can negotiate the community’s future together. Community building should honor the community’s past and create new institutions for the future. (Kennedy & Leonard 2001, 29-39)
Recommendations and Conclusions

The following presents two potential scenarios for partnership between the MUHC, the Inter-Neighbourhood Coalition and the City of Montreal, to assure the protection and proliferation of affordable housing in the areas adjacent to the proposed MUHC mega-hospital. In depth descriptions of specific planning tools and community strategies can be found in the previous sections of this report.

At the end of each scenario, a diagram visualizes the strategies that could be implemented by each stakeholder, in addition to the strategies that should be shared between different partners.

Scenario A: Realistic

The realistic scenario is rooted in the existing actions and policy commitments of the players in this partnership. The scenario elaborates potential short and long-term actions that will enhance affordable housing opportunities in the area. This scenario provides preventative strategies that could be implemented by all stakeholders to mitigate potential displacement of existing residents. Additionally, it will foster long-term constructive partnership between all stakeholders. Strategies are broken down for each stakeholder.

MUHC

The MUHC has already committed to:

- “Sustainable development” a part of the overall vision of the hospital complex – this involves commitment on environmental, economic and social equity (MUHC, Redevelopment Project (n.d.))
- “Loyalty to its community” and to “encourage and act on input from the community at all levels” (MUHC, Guiding Principals (n.d.))
- “Serve as a driving force for the educational and research missions of the University” (MUHC, Guiding Principals (n.d.))
- “promote health of the population through advocacy and community education” (MUHC, Guiding Principals (n.d.))
- A partnership agreement which states that it will: “optimize the positive impacts of arrival of MUHC” and “ensure the harmonious integration of the MUHC”
through collaboration with the Inter-Neighbourhood Coalition (MUHC, Partnership Agreement – see appendix –attachment B)

Therefore, our recommendations for possible avenues of action on the part of the MUHC are as follows:

In the **short term**, the MUHC should:

- Commit to partnership with the community by -
  - making adjustments to the existing partnership agreement to include transparency, flexibility and accountability.
  - presenting work and ideas developed through the partnership to the public, and create a schedule and format for this presentation.

- Make available a database of all land holdings held by McGill, the MUHC and the province on the island of Montreal.

In the **long term**, the MUHC should:

- Commit to encouraging the use of the Turcot Yards as a growth pole for laboratory facilities and secondary health infrastructure, in an attempt to minimize the pressure for converting existing residential units towards this end.

- Work with the members of the Inter-Neighbourhood Coalition (potentially the CDEC) to create a training programme for jobs that will be available in the MUHC for local residents.

In the **short and long term**, the MUHC should:

- Provide Equity Loan- to be placed in a community housing trust to enable community non-profit developers to create more affordable housing.

**Provincial Government**

The Province of Québec has committed to:

- To the ongoing existence of affordable housing programs such as Accès Logis and Logement Abordable

Therefore, our recommendations for possible avenues of action on the part of Provincial Government of Québec are as follows:

- Commit a base minimum amount of money to the existing housing programs so that longer range planning and coordination are possible.
**City of Montreal**

The City of Montreal has committed to:

- The construction of 60,000 to 75,000 by 2014, 30% of which must be affordable which works out to 22,500 affordable units (Montréal Master Plan 2004, 28)

- Encouraging affordable housing production through the “Habiter Montreal – Logements abordables : stratégie d’inclusion” (Habiter Montreal 2005)

- Alternative development standards (ADS) to make the construction of affordable housing less costly outlined in the ‘ Habiter Montreal – Logements abordables : stratégie d’inclusion” (Habiter Montreal 2005)

- Land banking in areas where there a shortage of affordable housing (Habiter Montreal 2005)

- ‘Sustainable Development’ on a city-wide basis both within the Master Plan and through a specific sustainable development strategy adopted by the City in April 2005 (Premier Plan Stratégique de Développement Durable de la Collectivité Montréalaise 2005)

Therefore, our recommendations for possible avenues of action on the part of the City of Montreal are as follows:

In the **short term**, the City of Montreal should:

- Establish a specific time period for the re-evaluation of the existing Housing Policy and the implementation of legal requirements to include affordable housing units in all new developments. For example: if, in the next two years, 4,500 new units of affordable housing are not constructed, the City commits to asking the Provincial government to modify the Montreal City Charter to allow for mandatory inclusionary zoning.

- Commit to addressing planning issues pertaining to the Glen and Turcot Yards as intrinsically connected in their redevelopment potential.

- Commit to “fast-tracking” projects with a minimum of 30% affordable housing.

- Give priority to local residents for affordable housing created in the Saint-Henri and Saint-Raymond areas.
• Commit to never having a decrease in the number of affordable housing units available on the Island of Montreal (No-Net-Loss Policy).

In the **short term and long term**, the City of Montreal should:

• Send a representative to the MUHC and Inter-Community Coalition Joint Committee to act as a resource person for the negotiations as well as a liaison with the City administration.

• Continue to land bank for affordable housing.

**Boroughs**

The City of Montreal’s Affordable Housing Policy encourages the inclusion of affordable housing in all new developments.

Therefore, our recommendations for possible avenues of action on the part of the Sud-Ouest and NDG-CDN Boroughs are:

• Re-zone land to residential zones only if the proposed development has a 30% affordable housing component.

**Community Groups**

The community groups represented in the Inter-Neighbourhood Coalition are committed to preserving affordable housing and serving the needs of existing residents.

Therefore, our recommendations for possible strategies of action are as follows:

In the **short term**, the community groups should:

• Encourage more 3rd party research into the impacts of the MUHC and housing issues in general.
  - Towards this end, consider applying for the SSHRC – Community University Research Alliance (CURA) grant – for funding to establish a five year partnership between the McGill School of Urban Planning and local community groups (for details on the CURA grant– see Appendix – Attachment B)

• Strengthen ties with non-profit developers.
• Continue to put pressure on the municipal government to have legally-binding affordable housing inclusion in all new developments.

In the short term and long term, community groups should:

• Identify sites for development and redevelopment of affordable housing.

• Create a community land trust.

• Encourage the construction of affordable housing in the area.

• Work towards job creation and training with the MUHC.
Realistic – Our Recommendations

MUHC
- Transparency of land holdings
- Equity Loan

Community
- Short-term:
  - Collaborative research (CURA grant)
  - Continue political pressure
- Long-term:
  - Identify sites
  - Community land trust

Job training

Partnership
- Prioritize existing residents
- Re-evaluate housing policy
- Fast-tracking
- No-Net-Loss Policy

Turcot Yard Lab site

Province

City

Borough

Figure 2. Venn diagram of Realistic Scenario
Scenario B: Optimistic

The optimistic scenario builds on the realistic expectations of Scenario A through additional financial and legislative changes by various partners. In this scenario, a constructive collaboration between partners is taken for granted and specific actions are elaborated. Housing issues and community action are addressed in a more proactive manner. This scenario elaborates potential short and long-term actions that will ensure affordable housing opportunities in the area, and privilege the needs of existing residents.

MUHC

Building on the commitments outlined in Scenario A the following are our recommendations for strategic action on the part of the MUHC:

In the short term and long term, the MUHC should:

- Build housing for their employees in the area and commit 30% of this housing to being affordable for existing residents.
  - This should be done to meet the MUHC’s goal towards sustainable development.
  - The City’s desire for large crown corporations to include affordable housing in all large-scale urban redevelopment projects.

- Contribute land to a land bank for affordable housing in Saint-Henri and Saint-Raymond.

- Contribute to the cost of decontamination of brownfield sites in Saint-Henri to help reduce the cost of developing these sites for affordable housing.

- Create and implement (in conjunction with community groups) job training programs and commit to hiring a percentage of local people on site.

- Build a community center or local health and wellness center (in collaboration with CLSC and/or City) on site or off.
  - This will provide space for skills training and informing the community about housing options, in addition to improving the health of the local community.
City of Montreal

Building on the commitments outlined in the previous scenario, the following are our recommendations for strategic action on the part of the City to ensure the adequate supply of affordable housing:

In the short term, the City of Montreal should:

- Implement a moratorium on development in the areas adjacent to the MUHC site in order to allow non-profit developers and community organizations enough time to mobilize resources for affordable housing development.
  - This will allow the community and non-profit developers to have an equal footing with for-profit developers, who are able to mobilize resources very quickly, to build housing.

In the long term, the City of Montreal should:

- To modify City of Montreal charter to include legal requirement for:
  - Inclusionary zoning that is mandatory and mandates 30% affordable housing in all new developments;
  - Transfer of development rights in such cases as there is a difference in floor area ratio of an existing building and what is now permitted under the zoning code under the condition that by accepting the money for the development rights, the affordable housing provider commits to keeping the site in question as affordable housing in perpetuity;
  - Density bonuses for creating affordable housing;
  - Linkage fees which obligate developers of office buildings, or other commercial, retail or institutional uses, either to build affordable housing or to pay into a housing trust fund to develop affordable housing for lower-income people;
  - Speculation and land gains taxes intended to return to the community a significant portion of the excessive value of any short-term gains made by rapid turnover of real estate;
  - Conversion ordinances that go beyond requiring replacement of affordable rentals that are being converted to condominiums, instead they requiring that a percentage of the condo’s created from affordable rentals be affordable to tenants that currently occupy the homes.
Community Groups

Building on the commitments outlined in the previous scenario, the following are our recommendations for strategic action on the part of the Community groups to ensure the adequate supply of affordable housing:

In the **short and long term**, the community groups should:

- Strengthen the community coalition
  - This should be done by increasing the network of different community groups to form stronger, larger and more powerful partnerships

- Apply for the SSHRC Community University Research Alliance grant and extend it beyond the School of Urban Planning and housing issues to other University departments such as Health or social work and the MUHC to make valuable contributions to community development in health care. (for details on the CURA – see Appendix – Attachment B)

- Continue to lobby for inclusionary zoning

- Community groups will oversee and potentially administer:
  - Land trust
  - McGill donations
  - The Health/ Wellness center
  - Skills training program
  - Housing creation
**Optimistic – Our Recommendations**

**MUHC**
- Build housing for workers
- Contribute land
- To land bank
- Contribute to cost
- Of decontamination
- Commit % to local labor
- Community Center

**Community**
- CURA - extended
- Continue to lobby
- Oversee/administer:
  - Land trust
  - The Health/Wellness center
  - Skills training program

**City**
- Modify Montreal Charter
- Obligatory affordable housing
- Linkage fees
- Speculation and land-gains tax
- Condo Conversion Ordinances
- Moratorium on development
Redevelopment Possibilities: Underutilized Land and Buildings in Saint-Henri and Saint-Raymond

As part of the mandate for this project, the Residential Resources team has done an inventory of available land and buildings that could be used for affordable housing development in Saint-Henri and Saint-Raymond. The inventory has been created of vacant and underutilized lots as well as properties with potential for residential conversion. This inventory has been used to provide information to community groups about the estimated cost of acquiring and building affordable housing on such land or acquiring and converting existing buildings into housing.

Vacant Lots

An assessment of vacant lots was done by the City of Montréal in November 2003 (Ville de Montréal 2003). Using this information as a starting point, we updated the assessment and identified eight vacant lots in Saint-Henri and one lot in Saint-Raymond (See Appendix, Figure 4 - Map of Vacant Lots and Appendix - Table 9 for a breakdown of each lot). The vacant lots we identified make up a total area of 35,000 square meters, which could accommodate about 950 new residential units that are 100 square meters each in size. If we assume that the cost of purchasing the land and constructing a new unit is $1,200 per square meter, it would cost $113.7 million dollars to construct the 950 new units (see table below).

<table>
<thead>
<tr>
<th>Number of Lots</th>
<th>9</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Area (square meters)</td>
<td>35,000</td>
</tr>
<tr>
<td>Estimated Number of New Residential Units (100 sq meters each)</td>
<td>948</td>
</tr>
<tr>
<td>Estimated Cost of New Residential Construction and Purchase</td>
<td>$1,200/sq meter</td>
</tr>
<tr>
<td>Estimated Purchase and Construction Costs, New Units</td>
<td>$113,700,000</td>
</tr>
</tbody>
</table>

Buildings

Based on information from the City of Montreal database called “Caractérisation du potentiel de transformation des bâtiments non résidentiels en unités d’habitation,” we have identified non-residential buildings with the potential to be converted into housing (Ville de Montréal 2005). Important to note is that not all buildings are currently for sale nor are they vacant, but many of them are underutilized and would be possible to purchase for the purpose of conversion into housing (See Appendix, Figure 5 - Map of Vacant and Underutilized Buildings and Table 10 &11 - Detailed information on each building with potential for residential conversion identified in the inventory). In Saint-Henri, we identified 31 buildings that could create a minimum of 1,933 units. The buildings range in size from
accommodating 4 to 400 units. Of these, 68% are currently vacant or underutilized, which could create a total of 1,227 new units. Estimating a cost of $1,000 per square meter for purchase and construction of housing, it would cost $122.7 million dollars to convert the buildings with the most possibilities for conversion (see Table 8 below). Proximity to public transit is a key requirement for building affordable housing, so within a five-minute walk from metro Saint-Henri, we have identified 13 buildings and five empty lots that could be locations for a total of 1,665 new housing units (See Appendix, Figure 6 -Map of Buildings with Potential for Residential Conversion within 5-15 minutes of Existing Metros).

In Saint-Raymond, we have identified 33 buildings that range in size from 3 to 54 units and could accommodate at least 368 new units. Of these buildings, 21% are vacant or underutilized. This means that 148 units are the most feasible to construct in the near future. Estimating a cost of $1,000 per square meter for purchase and construction of housing, it would cost $14.8 million dollars to convert these buildings into housing (see Table 8 below). Within a five-minute walk from the Vendôme metro station, there are four buildings with the potential to be converted into housing and one empty lot that could provide space for the construction and conversion of 192 new units of housing (See Appendix - Figure 6 -Map of Buildings with Potential for Residential Conversion within 5-15 minutes of Existing Metros and Table 10).

Table 8: Estimated Cost of Residential Conversion

<table>
<thead>
<tr>
<th>Estimated Cost of Residential Conversion (Purchase + Construction)</th>
<th>$1,000/sq meter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average Unit size</td>
<td>100 sq meters</td>
</tr>
<tr>
<td>Total number of units, vacant or underutilized, <strong>Saint-Henri</strong></td>
<td>1227</td>
</tr>
<tr>
<td>Cost of Residential Conversion, <strong>Saint-Henri</strong></td>
<td>$122,700,000</td>
</tr>
<tr>
<td>Total number of units, vacant or underutilized, <strong>Saint-Raymond</strong></td>
<td>148</td>
</tr>
<tr>
<td>Cost of Residential Conversion, <strong>Saint-Raymond</strong></td>
<td>$14,800,000</td>
</tr>
</tbody>
</table>

This information regarding empty lots and vacant or underutilized buildings will hopefully be useful to community groups wishing to work with local non-profit developers to construct affordable or social housing. We recognize that this is just a preliminary stage and provides only rough estimates for redevelopment. More in-depth calculations and market research will need to be done in the future once the community has mobilized funding for building affordable or social housing. These figures could also be useful in working with the MUHC and the City of Montréal to use their political and financial strength to attain loans that would be useful in building needed housing.
Conclusions

The previous recommendations were made based on the collection and analysis of case studies of institutions collaborating with communities elsewhere in North America and Europe. In addition, a review of policy techniques used by other municipalities to assure affordable housing provision was presented. We have learned a lot about what has worked in other cities that could be applied in the case at hand to minimize the displacement of current residents. This background research has allowed us to propose some recommendations and make some conclusions about what the community can do to improve the residential affordability in the Saint-Henri and Saint-Raymond communities.

The MUHC administration has already signed a partnership agreement with the Inter-Neighborhood Coalition to begin working with the community. This agreement is a good beginning, but in order to ensure the viability and usefulness of this partnership for years to come, certain aspects are currently missing. A successful agreement should include clauses to create a long-term partnership that will last and be flexible to change with the evolution of time and experience of all involved parties. A strong agreement will make transparent all stakeholders’ powers and make everyone accountable for their actions. In addition, a successful agreement should contain a strategic plan that outlines concrete actions to be completed by each party. These are just some suggestions that, if implemented, could make the partnership between the MUHC and the Inter-Neighborhood Coalition stronger and work more effectively to achieve the goals of all invested parties.

In terms of the City of Montréal and its Boroughs, certain actions could be taken to assist in the partnership between local community groups and the MUHC to improve collaboration and to increase access to affordable housing for residents. Representatives from the City and Borough administrations should be essential stakeholders in the MUHC Inter-Neighborhood Coalition. This will increase accountability by all members and encourage the City to use its policy capabilities to help minimize the negative impact of the MUHC on local housing affordability. Most importantly, the City of Montréal is a key player in affordable housing provision. Although it has made many good strides towards creating more affordable housing, the City needs to take a more forceful stance if its goal of 4,500 new units in the next two years will be met. A mandatory policy that is legally binding for all developers on the island to include 30% affordable housing units in any new development is the only effective way housing affordability will be achieved in the long term.

Finally, in order to ensure residents in the Sud-Ouest and NDG are not pushed out of their communities because of new developments, the community groups Solidarité Saint-Henri...
and the Housing Committee of the NDG Community Council, who initiated this project, should continue the research they have begun. Although funding sources for research are rare, this project was the beginning of a community-university partnership and has the characteristics to secure funding from the federal government’s Community University Research Alliance grant. Funding will allow a more concerted effort by the community to develop a strong strategy for affordable housing provision and will enhance the connection between local Montréal communities and McGill University researchers and students. This official connection, if supported financially, will have benefits for all parties involved and will definitely have positive outcomes in terms of community improvement.


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APPENDIX

Attachment A: Conflict Resolution and Negotiation – Summary of Getting to Yes: Negotiating Agreement Without Giving In
By Fisher, Ury, & Patton

I. The problem of reaching an agreement

Don’t bargain over positions instead focus on interests

• Positions are like offers and counter-offers, sometimes called "bids"

• Arguing about positions induces parties to lock themselves into positions that may result in less than optimal agreements – as more attention paid to positions means less attention is paid to the underlying concerns of the parties

• Arguing about positions can take longer than focusing on interests because both parties may try to make several offers and counter-offers before they reach an agreement that satisfies their interests

• Arguing about positions may hurt an ongoing relationship between the parties

• Positional bargaining is even more difficult when there are more than two parties

II. Just being "nice" doesn't help you an optimal agreement

• There is "hard" and "soft" positional bargaining (hard = don't give in; soft = make concessions)

• But neither may reach an optimal agreement because using ‘soft’ positional bargaining you may make too many concessions, while using ‘hard’ positional bargaining may damage the relationship

III. Solution: negotiate on the "merits" of the problem

A) Use principled negotiations

• View participants in negotiations as problem solvers and not as friends or adversaries

• View the goal as achieving a wise outcome efficiently and amicably,
not just reaching an agreement or winning (10)

B) "Separate the people from the problem."
"Be soft on the people and hard on the problem."
  • Proceed whether or not you trust your opponent. (17)

C) "Focus on interests not positions."
  • Explore each other's interests (what they really want or need) - this is more than
    making offers, counter-offers, or threats – focusing on interests can further the
    negotiation because behind opposed positions lie shared and compatible interests, as
    well as conflicting ones.
  • Avoid fixating on a bottom line (40)

D) "Invent options for mutual gain"
  • Use brainstorming to invent multiple options
  • Key Ground rule: don’t judge or criticize the options during the brainstorming
    decide later which options are best

E) Use objective criteria
  • Focus attention on standards that are independent of the feelings or
    will of the negotiators
  • Use logic and reason- yield to an argument or presentation that is based on reason
    and principle - not to one based on pressure (83)

IV. Potential problems

A) What if the opponent is more powerful?
Protect yourself - don't agree to something you don't want
  • Don't focus too much on your bottom line or you might give up
    everything right down to your last dollar; rather focus on your
    target point

Know your BATNA (Best Alternative to a Negotiated Agreement) – the point of
negotiation is to obtain something better than the results you could obtain without
negotiating – your BATNA is the standard against which any proposed agreement should be
measured
  • You might feel insecure and more likely to give in if you don't know
    your BATNA
Establish a "tripwire" or point that is something better than your BATNA – the point is to give you early warning that the agreement is beginning to run the risk of being too unattractive- this point will slow you down and may keep you from giving up too much (100)

"Make the most of your assets"
- "The better your BATNA the greater your power" – most people think that negotiating power is determined by access to resources like wealth, political connections - BUT – in fact, the relative negotiating power of two parties depends primarily upon how attractive to each is the option of not reaching an agreement
- Develop BATNAs (Best Alternative to a Negotiated Agreement)
- Make a list of your options if you don't reach an agreement - use the following to help you do so - knowledge, time, money, people, connections, and your own ingenuity
- Improve some of them and convert them into practical alternatives
- Tentatively select the alternative that seems the best

Think about the other party's BATNA – the more you think of their alternatives the better prepared you are for negotiation (105)

B) What if the opponent refuses to use principled negotiations?
- Use "Negotiation Jujitsu" - don't dig yourself in and push back to hard and firm positions; Jujitsu uses the other parties force against them - rather than responding to the force of their position let it come to you and them work on the underlying interest that is creating the force (108)

- Don't attack a position - look for their underlying interests

- Rather than defending your ideas, ask for criticism and advice from the other party

- When they attack you personally - let them blow off steam - tell them you understand what they are saying - and then recast or reword their attack on you so that is changed and reformulated to an attack on the problem

- "Ask questions and pause"
Specific things you might say to get them to focus on the problem and not the people or a position:

a) "Please correct me if I'm wrong"
b) "We appreciate what you've done for us."
c) "Our concern is fairness."
d) "We'd like to settle this based on some objective standards - not on who can do what to whom."
e) "Trust is a separate issue" or "it's not a question of trust."
f) "Could I ask a few questions to see if my facts are right?"
g) "What's the principle behind your action?"
h) "Let me see if I understand what you are saying."
i) "Let me get back to you."
j) "Let me show you where I'm having trouble following your reasoning."
k) One fair solution might be ...
l) "If we agree ...
\[n\) "If we disagree ...
\[n\) "We'd be happy to see if we can ... when it's most convenient for you."
o) "It's been a pleasure dealing with you." (118-128)

C) What if the opponent uses dirty tricks?
The following are some types of dirty tricks and suggested responses to them:

- Deliberate deception – such as phony facts or intentional misinformation - General rule of Thumb - unless you have good reason to trust someone else - don't; insist on independent verification as a matter of practice (e.g., "We always verify the facts") and not as an attack on an individual ("I'll have to verify your claim.") (132)

- Ambiguous authority - they first told you or implied that they had authority to reach an agreement and then later said they'd have to check with their superiors
  i. Don't assume the other side has authority
  ii. Insist on reciprocity - i.e., if the opponent has to check first, then you should also have the opportunity to make changes - i.e., the agreement becomes tentative subject to approval by both side's superiors or constituencies (133)
• Dubious intentions about compliance with the agreement - they've agreed but will they really follow-through?
  - insist on methods or procedures to insure future compliance (134)

• Psychological warfare
  a. stressful situations:
     i. Examples: uncomfortable physical surroundings, the other party's turf, etc.
     ii. Response:
        - insist on changing location, time etc. (135)

• Personal attacks to make you feel uncomfortable
  i. Examples:
    - "looks like you were up all night - things not going well at the office?"
    - making you wait for them
    - interrupting the negotiations so that they can deal with other people
    - not listening and making you repeat yourself
  ii. Response:
    - recognize it as a tactic - so that it's impact on you is minimized
    - if appropriate mention it to your opponent and ask that it not be repeated (136)

• Good guy/bad guy (a.k.a., good Cop/bad Cop)
  i. Example: The "good guy" seeks your help and concessions the "bad guy" puts pressure on you and attacks
  ii. Response:
    - recognize the tactic
    - when the good guy makes his pitch to you stick to your principled position (137)

• Threats
  i. Examples
    - "you will agree to this or else we will ...."
  ii. Responses:
    - don't respond with counter-threats because they might escalate the conflict
    - ignore them
    - treat the threat as unauthorized by the other party's constituency
- treat the threat as something spoken haste and not serious or irrelevant
- make it risky to communicate threats - by accurately recording them, taking notes, tape recording, reporting them to your constituency
- respond by saying that you only negotiate on the merits of the issues - not by responding to threats (137)

• Positional pressure
  i. Refusal to negotiate - or set up preconditions to begin the negotiation
  ii. Response:
    - recognize that it may be a tactic
    - talk about the opponent's refusal to negotiate to discover what their underlying interests are that may be keeping them from negotiating - or focus on principles for negotiating
      - Suggest some options: third party, sending letters back and forth, etc.(138)

• High-ball/Low-ball extreme demands
  i. Response:
    - call the tactic to the opponent's attention
    - ask for a reasoned justification of their position
    - ask for a more serious offer before you counter-offer

• Escalating demands - rather than making concessions as negotiations progress - they ask for more or open up issues that you thought had been settled
  i. Responses:
    - call this tactic to the attention of the opponent
    - suggest a break so that you can consider whether you will continue to negotiate with them (139)

• Lock-in tactics, or playing chicken - like making an irrevocable commitment that a party can't back away from without harming themselves
  i. Response:
    - interrupt it before it becomes locked-in
    - de-emphasize the other party's commitment and focus on the principle rather than pressure (140)

• Calculated delay: - stalling or doing nothing
i. Response:
   - discuss the tactic with the opposing side
   - bargain over delays
   - consider a "fading opportunity" one that will disappear or diminish in value as time passes (141)

• "Take-it-or-leave-it"
  - recognize it and discuss it, or ignore it
  - look for a face-saving way for the opponent to get off their position (150)

Attachment B: Partnership Agreement – McGill University Health Centre and the Inter-Neighbourhood Coalition

PARTNERSHIP AGREEMENT

PREAMBLE
This document outlines the terms of the partnership agreement between the McGill University Health Centre (MUHC) and the Inter-Neighbourhood Coalition of local community health, economic, and social agencies from the communities of NDG, Westmount and the Sud-Ouest de Montréal, which are adjacent to the future home of the MUHC’s Glen Campus.

AIM OF THE AGREEMENT
To establish a means of communication and participation between the partners (named below) in order to ensure the harmonious integration of the MUHC into the surrounding community.

PARTNERS
THE MCGILL UNIVERSITY HEALTH CENTRE
As represented by the persons designated by the MUHC
&
THE INTER-NEIGHBOURHOOD COALITION
As represented by the persons designated by the CLSC Notre-Dame-de-Grâce/ Montréal-Ouest, CLSC Métro, CLSC Saint-Henri, CDEC Côte-des-Neiges/Notre-Dame-de-Grâce, Contactivité Centre, RESO, Solidarité Saint-Henri, Conseil Communautaire de Notre-Dame-de-Grâce and the Westmount Municipal Association

AGREEMENT
1. The partners agree to form a Joint Committee.
2. The Joint Committee, following an active partnership model, shall establish an open and accessible dialogue opening the door to constructive and practical collaboration.
3. The areas/subjects of principal preoccupation will most likely, although not exclusively, be:
   - Site development (environment, circulation...)
   - Direct and indirect employment, potential employment and training
   - Economic development (businesses and services)
   - Housing
   - Challenges in health care service delivery - community concerns
4. The Joint Committee shall be composed of two to four (2-4) representatives from the MUHC and three to four (3-4) representatives from the Inter-Neighbourhood Coalition. Other persons may be invited to meetings according to expertise required relative to identified needs.
5. The Joint Committee shall meet at least four (4) times per year.
6. The Joint Committee shall determine its rules at the initial meeting.
7. The signing partners to this agreement agree to combine their efforts in order to optimize the positive impacts of the arrival of the MUHC and its integration into the surrounding communities in the context of its mission and social-health mandate defined by the MSSS.
8. Following an agreement by the partners, other agencies may join the Inter-Neighbourhood Coalition and MUHC partnership.
Attachment C: SSHRC – Community University Research Alliance (CURA)

The Social Science & Humanities Research Council of Canada offers significant support to help facilitate partnerships between local universities and community groups. The Community University Research Alliance is a fairly new program in existence since 1999. The specific objectives of the program are as follows:

Objectives:

The purpose of the program is to support the creation of community-university alliances which, through a process of ongoing collaboration and mutual learning, will foster innovative research, training and the creation of new knowledge in areas of importance for the social, cultural or economic development of Canadian communities.

Specific objectives are to:

- Promote sharing of knowledge, resources and expertise between universities and organizations in the community;

- Enrich research, teaching methods and curricula in universities;

- Reinforce community decision-making and problem-solving capacity; and

- Enhance students’ education and employability by means of diverse opportunities to build their knowledge, expertise and work skills through hands-on research and related experience.

Program Description:

A community-university research alliance is based on an equal partnership between organizations from the community and the university, and provides co-ordination and core support for planning and carrying out diversified research activities that reflect the CURA program objectives, are centred on themes/areas of mutual importance to the partners, and are closely related to their existing strengths.

Each CURA’s activities will include:

- A research component (short-term and long-term projects, action research, etc.);
• An education and training component (in the context of research projects, apprenticeships, activities credited as part of coursework, etc.); and

• A knowledge-mobilization component (workshops, seminars, colloquia, policy manuals and other publications, public lectures, etc.) that meets the needs of both academic and community partners.

Value and Duration:

Applicants successful at the Letter of Intent stage are eligible for a development grant of up to $20,000. At the Letter of Intent stage, eligible expenses are limited to travel, workshops, meetings, secretarial support and communication and dissemination activities.

An individual CURA can receive funding of up to $200,000 annually for up to five years. CURA grants are subject to:

• SSHRC's fiscal ability to provide the support;
• Satisfactory compliance with the program's reporting requirements; and
• A positive mid-term (third-year) evaluation.

The grant may be used to cover non-physical infrastructure costs for the support and coordination of the research teams and for carrying out some of the research activities. Applicants should familiarize themselves with the regulations on eligible and ineligible expenses. CURAs are expected to seek funding from sources other than SSHRC to help support their research activities.

Eligibility

Applications

Applications must be submitted jointly by one or more universities and one or more organizations from the community. "Community" may refer to either a geographic focus or to an issue/interest focus.

This requirement reflects the fact that CURAs are partnerships between universities and organizations from the community established to jointly develop and implement research activities. While there may be cases where a single community partner is appropriate, it is expected that most CURAs will involve two or more non-university partners.
Universities

All Canadian universities are eligible to apply to the program. Applications may also be submitted by a consortium of postsecondary institutions led by a particular Canadian university.

CURAs must be closely associated with academic units (department, centre, faculty, institute) within the participating university or universities. Specifically, a CURA must:

- Focus on an area of strength of the participating academic units as demonstrated, in particular, by a critical mass of professors and students working in that area; and
- Have identified, at the time of the application, a sufficient number of professors who will be actively involved in the program.

Organizations from the community

Organizations from the community may include public, community or private sector organizations (action groups, volunteer groups, local or provincial government departments or agencies, businesses, etc.) that are active in social, economic or cultural fields relevant to the CURA's research and training. Federal government departments, provincial, territorial and municipal governments, and for-profit organizations are not eligible to receive SSHRC grant funding and therefore cannot submit an application to lead a CURA. While federal government departments are not eligible to receive direct SSHRC funding, they may participate as partners. Researchers from these organizations may participate in research projects as collaborators.

Otherwise, organizations from the community may take the lead in submitting the application and may manage the funds, provided that they:

- Are located in Canada;
- Are non-profit organizations, incorporated in Canada, with a social, cultural or economic mandate;
- Have a research mandate and subscribe to protocols of research that include freedom in the conduct of research and the obligation to publish findings;
- Have a record of research output which has been reviewed and disseminated in the appropriate channels;
- Conform to the protocols set out in the Tri-Council Policy Statement: Ethical Conduct for Research Involving Humans (TCPS); and
- Produce annual audited financial statements and are able to take on fiduciary responsibility for grant funds.
Letter of Intent (LOI) Web Application
Deadline: May 5, 2006

A multidisciplinary committee of both academic and non-academic leaders, will evaluate eligible letters of intent according to the following criteria:

• Demonstrated importance of subject area to the social, cultural or economic development of Canadian communities (relevance);

• Potential for significant outcomes, i.e., impacts on student training, capacity-building, curriculum development, new modes of service delivery and community decision-making;

• Soundness of the research approach (methodology);

• Quality of the alliances among the participating institutions and organizations, including the nature of collaboration and commitment on the part of all partners; and

• Appropriateness of plans for the dissemination and mobilization of knowledge.

The selection committee will be free to suggest to successful letter of intent applicants ways to strengthen their formal application. It could, for example, suggest the grouping of complementary applications, propose other possible partnerships or recommend additional sources for funding.

Nonprofit organizations, without research capacity, are encouraged to create alliances with researchers from established research institutions, in order to explore the possibility of collaboration.

Formal Application
Deadline: (by invitation only) September 8, 2005

Formal applications will have to provide:

• More extensive information on the research, training and knowledge mobilization activities, on the full budget requirements, on the

• Director(s) of the CURA and on the research teams in place (professors, students and community);

• A framework for the on-going evaluation of the CURA (including performance indicators); and

• Further information explaining the conditions under which each partner is participating and how the funds will be shared and administered.
For formal applications, the evaluation criteria are as follows:

- Importance of the research question(s);
- Rationale for and quality of proposed approaches to achieve stated objectives of the CURA;
- Track records of academic and community-based partners, both individuals and organizations, in their respective fields of engagement;
- Demonstrated quality and strength of partnership (level of commitment and engagement throughout research cycle, clarity and balance of governance structure);
- Suitability, scope and timing of proposed knowledge dissemination and mobilization activities;
- Likelihood of producing significant results and impacts by the end of the five-year funding period;
- Appropriateness of budget and capacity to leverage resources (financial and/or in-kind) from additional sources; and
- Quality of evaluation framework and process: clarity and feasibility of specific measures (i.e. performance indicators) to assess meaningfully the performance of the CURA.

(For more detailed information please consult the SSHRC CURA website at:
http://www.sshrc.ca/web/apply/program_descriptions/cura_e.asp

Example CURA Partnership
Neighborhood Change and Building Inclusive Communities from Within – A Case Study of Toronto’s West Central Neighborhoods: A partnership between The St. Christopher House and the Center for Urban and Community Studies (U of T)
Full description of partnership activities available online at
http://www.urbancentre.utoronto.ca/cura/
Figure 4: Map of Vacant Lots in Saint-Raymond & Saint-Henri

Map of Vacant Lots
in Saint-Raymond & Saint-Henri

Legend:
- Building with potential to be converted into housing
- 617 Street number
- Empty lot with potential for new housing development
- Mixed-use zone
- Residential zone

A Empty lot

Created by: Residential Resources, November 8, 2005
McGill University School of Urban Planning
Table 9: Vacant Lots – Specifications of Each Lot

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<th>Lot</th>
<th>Area (sq. meter)</th>
<th>Floor Area of Potential building</th>
<th>Number of floors</th>
<th>Total Area (sq. meters)</th>
<th>Number of potential units (100 sq meters each) *(Not considering common space subtraction)</th>
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Figure 5: Map of Vacant and Underutilized Buildings in Saint-Raymond and Saint-Henri
### Table 10: Buildings with Potential to be Converted into Housing: Saint-Henri (Sud-Ouest)

#### SUMMARY:
- **31 buildings** that range in size from 4 to 400 units
- Minimum number of units of vacant or underutilized buildings: **21**
- Number of units in vacant or underutilized buildings: **1,220**
- Total number of vacant or underutilized units: **1,933**
- Minimum number of units: **193**
- Number of vacant or underutilized buildings: **21**

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<th>Quality of Surrounding Neighbourhood</th>
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<th>Area of Building (sq m)</th>
<th>Number of Floors</th>
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**Table 11: Buildings with Potential to be Converted into Housing: Saint-Raymond (CDN-NDG)**

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**SUMMARY**

33 buildings that range in size from 3 to 54 units

Minimum number of units: 368

Number of vacant or underutilized buildings: 148

Number of units in vacant or underutilized buildings: $36,800,000

Number of vacant or underutilized units: $14,800,000

Total number of units: 148

Total number of units, vacant or underutilized: 148

$100,000
Figure 6: Map of Buildings with Potential for Residential Conversion within 5-15 minutes of Existing Metros
Attachment D: Additional Funding Sources

Residential Rehabilitation Assistance Program (RRAP) for Conversion

The RRAP — Conversion provides assistance to convert non-residential properties into affordable self-contained rental housing units or bed-units. This program is available in all areas.

Who is eligible?

Eligible clients are those owning and converting non-residential properties to create affordable rental accommodation for low-income households. These clients include:

- Private entrepreneurs
- Non-profit corporations
- First Nations.

Eligible properties must be:

- Environmentally safe
- Feasibly converted to residential accommodation
- Viable based on agreed post-conversion rents.

MAXIMUM LOAN = $24,000 PER UNIT


Seed funding

Seed Funding offers financial assistance to housing proponents who are in the very early stages of developing an eligible housing project. Seed Funding may be made available to any proponent of a housing project that will be innovative, or community-based or affordable. The proponent may be:

- A not-for-profit organization.
- A housing cooperative.
- A First Nation.
- A private entrepreneur.
- A group of individuals who may or may not intend to become incorporated.

The maximum amount of Seed Funding is $20,000 per housing project proposal to carry out eligible activities.
• **Up to $10,000** for a given housing project proposal is in the form of a grant, with no repayment required.

• **An additional amount — up to $10,000 —** may be made available in the form of an interest-free loan, which is repayable if the housing project proceeds.


**Proposal Development Funding (PDF)**

Proposal Development Funding (PDF) loans help with the up-front expenses incurred during the process of developing an affordable housing project proposal. A PDF loan enables housing proponents to carry out the activities required to bring their proposal to the point where they can apply for mortgage financing.

**What is Proposal Development Funding (PDF)?**

Proposal Development Funding (PDF) provides repayable interest-free loans to facilitate the development of affordable housing.

Loans of up to $100,000 are available for affordable housing project proposals by non-profit or private sector proponents who can demonstrate that their intended housing project can meet **CMHC’s affordability criteria**

PDF loans will be repayable if the proposed project succeeds. A portion of the PDF loan may be forgiven, if the proponent is successful in adding to the stock of affordable housing, as defined by CMHC.

**What is the maximum PDF loan available?**

Up to $100,000 is available to develop an affordable housing project proposal. CMHC will determine the actual amount of each loan, depending on the size and complexity of the proposed housing project and how much development work needs to be done.

**Who is eligible for funding?**

PDF loans will be made available to any proponent who can demonstrate that their proposed housing project will be affordable, including:

• A not-for-profit organization

• A housing cooperative

• A First Nation
• A private entrepreneur

• Any other housing proponents who can demonstrate their ability to produce a viable affordable housing project which meets CMHC's criteria.