



# Final Report

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**Project Name: Rural Seniors Eco-Village Initiative Western MD of Rocky View**

**Project Number: 071**

**Prepared By: Lori Kovacs, Executive Director, Communities Development Society and Gwyn Butler, Project Coordinator, Communities Development Society**

**Edited and Submitted By: Jodie Eckert, Community Economic Development Coordinator, Community Futures Centre West**

**Date: March 17, 2008**

# TABLE OF CONTENTS

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<b>1</b>	<b>PROJECT DATES.....</b>	<b>3</b>
<b>2</b>	<b>BACKGROUND AND CONTEXT.....</b>	<b>3</b>
2.1	PROBLEM/OPPORTUNITY STATEMENT.....	3
2.2	NEED FOR PROJECT.....	3
<b>3</b>	<b>FINANCIAL INFORMATION.....</b>	<b>4</b>
3.1	ACTUAL REVENUE AND EXPENSES.....	4
3.2	SOURCES OF REVENUE FROM PROJECT FUNDERS.....	4
3.3	IN-KIND CONTRIBUTIONS BY PROJECT PARTNERS.....	5
3.4	EXPLANATION OF DISCREPANCIES – PLANNED AND ACTUAL COSTS.....	5
<b>4</b>	<b>PROJECT ACTIVITIES.....</b>	<b>5</b>
4.1	PROJECT TIMELINES.....	5
4.2	UNEXPECTED SUCCESSSES FOR THE PROJECT.....	7
4.3	ACTIVITIES IN CONTRACT NOT COMPLETED - EXPLANATION.....	7
<b>5</b>	<b>BENEFITS RESULTING FROM PROJECT.....</b>	<b>8</b>
<b>6</b>	<b>MEDIA COVERAGE.....</b>	<b>10</b>
<b>7</b>	<b>REFLECTIONS AND LESSONS LEARNED.....</b>	<b>10</b>
7.1	REFLECTIONS FROM GWYN BUTLER – CDS PROJECT COORDINATOR.....	10
7.2	LESSONS LEARNED BY CDS.....	11
7.3	LESSONS LEARNED BY CFCWEST.....	13
<b>8</b>	<b>APPROVALS.....</b>	<b>14</b>
<b>9</b>	<b>APPENDICES.....</b>	<b>15</b>
9.1	ATTACHMENTS.....	15
9.2	INVOICE.....	15

# 1 PROJECT DATES

August 1, 2006 – March 17, 2008

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## 2 BACKGROUND AND CONTEXT

The Western Rocky View Communities Development Society (CDS) has been working towards the development of a Rural Seniors Eco-Village for the past 3 years in the greater rural Bearspaw area northwest of Calgary. Many of the region's aging members are leaving the community for senior's centres in Calgary because of the lack of facilities and supported housing options. The proposed Rural Seniors Eco-Village would be senior led and driven, reflect rural values and allow seniors to remain in their communities as they age.

### 2.1 Problem/Opportunity Statement

CDS and Community Futures Centre West (CFCWest) conducted 2 years of consultation with rural seniors. This consultation revealed that rural seniors want to:

- be valued and appreciated for the skills and knowledge
- remain independent within their own communities – to “age in place”
- be stewards of the land
- maintain and celebrate the history of the area they live in and
- be able to respond to issues/concerns affecting them

The purpose of this project is to develop a business plan for the Seniors Eco-Village and a best practices resource book on the process engaged in to date.

### 2.2 Need for Project

As rural populations age, they face unique challenges associated with remote physical location and lack of easy access to services. Urbanization further impacts rural values and lifestyles with loss of agricultural land and breakdown in the close knit community social network. For some seniors the support systems they had come to rely upon through their social network were lost due to attrition as seniors left the community. This caused dislocation, isolation and emotional stress among seniors. Increasingly, rural seniors in the western area of the Municipal District or Rocky View (MDRV) are being pressured to sell and leave their rural communities for larger centers due to limited ability to downsize and lack of housing options that would keep them in their communities longer. At best, local groups provide a fragmented approach to tackling the problems. Within the next 10 years, the bulk of the baby boomers become senior and will be an influential demographic force in looking at new ways of approaching the aging process.

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### 3 FINANCIAL INFORMATION

#### 3.1 Actual Revenue and Expenses

REVENUE	YTD
RCED	45,000.00
<b>TOTAL REVENUE</b>	<b>45,000.00</b>

#### EXPENSE

##### GENERAL OPERATING

Professional Services	1,000.00
Consulting Fees	46,590.43
Advertising	478.96
Administration	168.39
Postage/ Courier	53.10
GST	1,709.12
<b>TOTAL EXPENSES</b>	<b>50,000.00</b>
<b>NET INCOME</b>	<b>-5,000.00</b>

#### 3.2 Sources of Revenue from Project Funders

CFCWest	\$ 1,000
Bearspaw Lions Club	\$ 5,000
The Calgary Foundation	\$25,000
CDS (from community donors)	\$10,000
<b>Total</b>	<b>\$41,000</b>

### 3.3 In-Kind Contributions by Project Partners

All in-kind contributions are confirmed and delivered

CFCWest	\$2,500 (originally \$8,050)
Bearspaw Historical Society	\$1,400
Bearspaw Lifestyle Centre	\$ 700
Bragg Creek Community Association	\$ 250
Beaupre Community Association	\$ 50
Springbank Heritage Club	\$ 175
Bearspaw Lions Club	\$ 500
Bearspaw/Glendale Women's Institute	\$ 300
CDS	\$ 1,500
<b>Total</b>	<b>\$7,175</b>

### 3.4 Explanation of Discrepancies – Planned and Actual Costs

In-kind contributions from CFCWest were less than anticipated:

	<b>Budget</b>	<b>Actual</b>
Board Room/Office Space	\$3600	\$100
Business/Community Consultation	\$3600	\$2200
Mail outs/Copying	\$850	\$200
<b>Total</b>	<b>\$8050</b>	<b>\$2500</b>

Amounts budgeted were a bit high. The total consultation in-kind may have been used (and exceeded) if CFCWest supervised the contractors, but it was mutually decided at the beginning of the project that CDS would have this responsibility.

## 4 PROJECT ACTIVITIES

### 4.1 Project Timelines

<b>Activities Performed</b>	<b>Results Achieved</b>
Business Plan developed	<ul style="list-style-type: none"> <li>• Business plan was developed simultaneously alongside housing project concept development. This led to a dual role of a contract person in a highly complex project</li> <li>• Offer of land donation pushed this project into high gear and shaped the direction of the business plan</li> <li>• Land donation also steered planning into a more implementation role of dealing with the land donor family, memorandum of agreement, and legal advice sought.</li> </ul>
Hire an architect	<ul style="list-style-type: none"> <li>• Not completed - it was premature to hire an architect at this point in the project. This should be covered at a later date in project development when the concept is fully developed in relation to surrounding lands.</li> </ul>

<p>Potential spin-off businesses identified</p>	<ul style="list-style-type: none"> <li>• Locally grown produce greenhouses</li> <li>• Country Inn Bed and Breakfast</li> <li>• Transportation services</li> <li>• Medical services</li> <li>• Building and ground maintenance services</li> <li>• Food services</li> <li>• Housekeeping services</li> <li>• Conservation easement management and promotion</li> <li>• Potential MDRV Fire/EMS or other site</li> <li>• Agriculture initiatives identified as priority to be explored-ranching practices, partner with Olds College on agricultural incubator...)</li> <li>• Education/learning on site as well as a model for housing for rural seniors – visitation and inquiries from interested others</li> <li>• U of C MBA students – four students are exploring social enterprise/ land lease options for donated land</li> </ul>
<p>Best practices manual</p>	<ul style="list-style-type: none"> <li>• Research of seniors demographics, resources, services and other housing models, senior’s engagement processes, history of this project</li> <li>• Interviews of participants, organizers</li> <li>• Innovative housing referenced in the business plan</li> <li>• has helped CDS evaluate what it does well and what we can do differently in the future</li> <li>• provides a resource of the community development process used that other organizations and individuals can learn from</li> </ul>
<p>2 Focus Groups</p>	<ul style="list-style-type: none"> <li>• Not as many focus groups were held as we anticipated simply because the regular weekly meetings with seniors took priority and the process was moving at a pace that did not warrant unnecessary focus groups. It was decided by the group that focus groups would be utilized as a decision making/ information disseminating tool.</li> <li>• One focus group of 16 participants was held on Oct. 18/07 to make some decisions around ownership structures: <ol style="list-style-type: none"> <li>1. The type of non profit corporation to be registered as future owner and manager of project lands</li> <li>2. The equity content and payment process of home ownership that will be offered to residents</li> <li>3. The type of non profit corporation to be registered as future owner and operator of the proposed Health &amp; Wellness Center. The Health &amp; Wellness Center will be the common area amenities such as food services, recreational services, and medical services, etc.</li> </ol> </li> <li>• Rural Seniors Advisory Committee meeting (Dec. 3/07) This group was periphery to the rural seniors housing action group but are looking at regional approaches to seniors issues of which housing is one.</li> </ul>

3 Open houses	<ul style="list-style-type: none"> <li>• Four community forums held (Sept. Oct, 2007) these forums were broadly focused on community issues, land development and resident participation in land use planning. Seniors issues and seniors housing came up as one of many issues raised with a wider audience of community residents (157 participants in all)</li> <li>• Land donation announcement event (March 12/08) this event was to celebrate the land donation by a local aging rancher to the housing initiative. Over 200 invitations were set out to a wide sector of residents, politicians, funding and other partners. An estimated 120 people attended.</li> <li>• Completed a presentation in power point format for the Calgary and area Community Development Conference (held Jan. 24/25/08) in Calgary. A copy of this presentation can be provided. Two seniors assisted in the presentations</li> </ul>
Complete Seniors Survey	<ul style="list-style-type: none"> <li>• A survey was completed in Feb/Mar. 2006 by the senior's task force. They developed questions and personally interviewed and delivered surveys along with a broad mail out. 110 surveys were returned with 71 in support of the housing project. The group decided on no further surveys during the course of this phase.</li> </ul>
Develop a presentation for open houses	<ul style="list-style-type: none"> <li>• A power point presentation was developed and presented at the Calgary and Area Community Development conference on January 24, 25/2008. See CD provided.</li> </ul>
Develop 2 new funding partnerships	<ul style="list-style-type: none"> <li>• Gaining Ground Institute for Urban planning conference in May 08 and fall rural conference.</li> <li>• An anonymous donor – funding for land lease social enterprise model</li> </ul>

#### 4.2 Unexpected Successes for the Project

- The donation of 20 acres of ranchland to the project in late October gave focus to the project now that we could plan around a particular piece of land.
- Due to MDRV planning requirements, the 20 acres of land has now turned into setting aside the whole ¼ section for planning.
- The land donation has also side tracked the project by catapulting it into an implementation phase they were not intending to do (e.g. Meetings with MDRV planning staff around suitability of the land, water analysis).
- An unexpected outcome was that several local developers and councilors have approached CDS to work together with residents on a community vision!

#### 4.3 Activities in Contract Not Completed - Explanation

- Full and reflective evaluation done by participants in the senior's housing project on documentation and processes was not completed to the Society's satisfaction. Four interviews have been done and incorporated into the best practices resource book; however, it would be good to get a wider view from previous or marginal participants. We were unable to complete this portion of the evaluation for this report however it is still something that will be undertaken following the land donation announcement.

## 5 BENEFITS RESULTING FROM PROJECT

Performance Indicator	Baseline	Measurable Benefits	Target	Achieved
# of project partners	7	<ul style="list-style-type: none"> <li>The Calgary Foundation</li> <li>New Horizons for Seniors</li> <li>Alberta Lottery Fund- Community Infrastructure Program</li> <li>Alberta Community Development</li> <li>The Family Office</li> <li>Calgary Mortgage and Housing Commission</li> <li>Bearspaw Historical Society</li> <li>Bearspaw Lions Club</li> <li>University of Calgary</li> <li>Mount Royal College</li> <li>Chinook Institute of Stewardship</li> <li>50 professional advisors (provided advice or referrals)</li> </ul>	10	11
communication with REDA (# of meetings, email)	1	<ul style="list-style-type: none"> <li>Briefly spoken about once at the Calgary Regional Partnership Economic Development Forum. Not a lot of time is allotted for this type of sharing</li> <li>One meeting with Judy McMillan-Evans – Community Futures Community Economic Development Specialist</li> </ul>	2	2
# of best practices identified	0	<ul style="list-style-type: none"> <li>8 best practices were identified</li> <li>More will be developed if we had more time to work on this highly evaluative document</li> <li>Being in a process and identifying best practices at the same time does not allow for adequate process development and reflection time to take place</li> </ul>	not specified	8
communication with other CF's	0	<ul style="list-style-type: none"> <li>see section 7.3 – Reflections and Lessons Learned by CFCWest</li> </ul>	4	0
communication with community (meetings, newsletters, media stories)	100	<ul style="list-style-type: none"> <li>Over 300 invitations (mail and email) for major media event March 12.08 – land donation announcement</li> <li>Weekly emails to committee members with minutes of meetings and other information as needed</li> <li>Development of web page to place large document</li> <li>Development of interactive website for planning group – Basecamp to place planning documents and</li> </ul>	240	375

		<ul style="list-style-type: none"> <li>communicate with larger group</li> <li>Media stories will follow land donation announcement event (March 18/19, 2008 for local papers)</li> <li>Presentation at 2 day conference before 25 participants in breakout session (community development practitioners)</li> </ul>		
# of seniors participating in planning work	10	<ul style="list-style-type: none"> <li>There were 6-8 regular attendees /participants at meetings. Fluctuation in group due to health, illness, seniors being called back into the work force, level of commitment required, etc.</li> <li>Minutes were circulated to a larger group of members who did not necessarily attend meetings but participated through periodic feedback/input.</li> <li>Some seniors came in and out of the process and are included in these numbers</li> </ul>	20	6 - 8
# of focus groups	2	<ul style="list-style-type: none"> <li>Focus group of extended housing group met to discuss organizational structure and get their feedback</li> <li>Rural Seniors Advisory Group has met 3 times with 8 people attending to discuss issues at a broader regional level (western MD of Rocky View)</li> <li>The time for focus groups/ community visioning is better following the land announcement where we can get participants into sub committee working groups</li> </ul>	2	4
# of open houses	3	<ul style="list-style-type: none"> <li>Four community forums of wider representation of residents held with 157 participants</li> <li>Land donation announcement event</li> </ul>	6	5
# of survey responses	110	<ul style="list-style-type: none"> <li>Survey in this format was done earlier in the project by the housing group themselves</li> <li>The project process does not call for a survey (as a tool) to be done at this point</li> </ul>	185	110
# of funding partners	4	<ul style="list-style-type: none"> <li>Four funding partners</li> <li>Plus one land donation partner</li> <li>7 local association partners (financial and in kind contributions)</li> </ul>	6	8
participation in rural seniors conference	0	<ul style="list-style-type: none"> <li>Grassroots and Groundwork Seniors Workshop/conference held March 31, 2007</li> <li>3 resource guest speakers</li> </ul>	75	115

		<p>presented/facilitated</p> <ul style="list-style-type: none"> <li>• CDS participation in helping with the “Gaining Ground” Conference planned for Fall 2008 in Calgary</li> </ul>		
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## 6 MEDIA COVERAGE

Date	Description of Media Coverage
June 10,11, 12,13, 17, 18, 20	Job advertisements for researcher and housing project development manager positions in the Cochrane Eagle and Cochrane Times
March 12, 2008	Land donation invitation
March 19, 2008	Should be covered in the March 19 edition of the local papers

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## 7 REFLECTIONS AND LESSONS LEARNED

### 7.1 Reflections from Gwyn Butler – CDS Project Coordinator

#### SOME CANDID COMMENTS:

This land donation announcement is likely to re-energize a tired lot of folk.... seniors and CDS alike. The opportunity to add to the enormous amount of “capacity building” already undertaken in this project is incredible. This has been an exhausting process not only working with a very complex and constantly evolving project, but in meeting the Rural Community Economic Development (RCED) requirements for reporting and deliverables while still in the thick of it....like trying to pin down a moving target. Then as we held it down and tried to describe it, it morphed into something else. This was NOT a clear cut project or process and the patience of Jodie Eckert (in particular) from CFCWest in working with us on this was invaluable. So, an additional benefit to the project was having a funding and supportive agency that needs to understand community development and be willing to work in this very “grey area” of community capacity building. CDS realizes that in order for us to be successful in the community we need to surround ourselves with partnerships that understand and encourage grass roots community development work.

Another benefit being realized (as this report is written) is that the Bearspaw Lions Club – the originator and instigator of this particular project is also getting re-energized and has set up meetings to look at the role they might play in operations/management of the housing project. This is a huge step for them and one CDS welcomes heartily.

Would we do it all again? My mind says NO but my heart says YES. This was/is a hard project and one we did not want to tackle from the beginning. But, as we stepped up to engage community residents and showed a willingness to work on an issue no one else was prepared to tackle, the community saw the need/gap. If the project was to fold tomorrow, I still believe it is a success.... because it has built community capacity!

## 7.2 Lessons learned by CDS

### **Lesson No. 1: Find the balance shaping a project and letting it shape you**

A young organization needs to determine its direction before taking on a complex project of this nature. CDS knew that they were stepping out of their comfort zone when seniors' housing was the top issue the community identified. We knew going into this ambitious project that it would be hard, but we also knew that there was no one else willing to step forward to facilitate and work with this issue. The advantage of our "inexperience" as an organization was that we were not entrenched in a set way of doing things, were willing to learn from the process and take the risk of exploring the opportunity. This project also helped CDS determine our best fit in the community and narrow our mandate. It reinforced the need for a community instigator/initiator.

### **Lesson No. 2: Community development is more about the "process" than the "product"**

CDS decided early on that community involvement and direction were critical to our success. We worked hard to build and maintain relationships with residents and key community leaders/connectors so that the service we offered communities was meaningful and authentic. We are committed to the pace and time it takes the community to build capacity within resident-driven projects however there is a fatigue that sets in over an extended period. This project has gone up and down with momentum but overwhelmingly it has led us and the participants moving forward.

### **Lesson No. 3: Be rooted in your philosophy and evaluate constantly**

Our passion and conviction to community leadership has always been and continues to be our compass. The temptation is to want to take control back from the community because it is more comfortable than the feeling of not knowing where the process will lead you. We constantly evaluated the role we played and the direction of the project because we were NOT in control- the community was. We also recognized that it is in the "trying" that capacity is built and relationships developed.

### **Lesson No. 4: Take time to identify community need**

CDS took over 2 years to identify community need primarily through research and relationship building. Once the question of community growth was identified as a concern, the participants came out because they were all feeling the impacts of this issue in their daily lives. Also, there had been no previous organization interested in consulting with seniors on the scale we were in the community and there was an overwhelmingly good response as a result.

### **Lesson No. 5: Gathering the right people at the table is important**

Knowing your community and who the key community connectors and leaders are is vital to getting a good cross section of opinion. Often it is the loudest voice that is heard and we felt we had a representative perspective from seniors new and old to the community, acreage and old timer ranchers/farmers.

### **Lesson No. 6: It is important to follow-through on issues identified by the community**

It is not enough to identify community issues/concerns if you are not also prepared to do something about it. Taking results of consultation and having the community help with developing an action plan is important to establishing commitment to follow-through.

### **Lesson No. 7: Build on existing momentum**

Piggy back on momentum and knowledge gained from other consultations or initiatives. This also hinges on that all important relationship building and finding the right people through dialogue as well as partnership building in finding those initiatives that link in with your own direction and philosophy.

### **Lesson No. 8: Develop a Communication Plan**

Develop a communication plan and implement it as part of every project and initiative.

### **Lesson No. 9: Maintain relationships with community members**

Some residents may be skeptical and resist becoming engaged in the process. Maintain your relationship with these individuals as many like to come in and out of the process as they desire. Had it not been for the relationships we built and maintained, CDS would not have been the recipient of a ¼ section of land! The credibility and trust within the community of the work CDS does has paid off.

### **Lesson No. 10: Good recording keeping is important**

Keep good records and up-to-date databases of contacts information.

### **Lesson No. 11: Use a variety of methods to reach the target audience**

Use a variety of methods to reach your target audience knowing they have limited attention and time to tackle complicated issues. Word of mouth was found to be the most effective method working with seniors.

### **Lesson No. 12: The importance of follow-up**

Participant/residents need to see follow up to community engagement both in terms of activities and communication.

### **Lesson No. 13: Keep building relationships**

Keep asking and building relationships until you get to know what the individual is interested in. Over time, we have been able to gain more and new volunteers into a variety of positions.

### **Lesson Learned No. 14: Have Professional Guidance from the Start**

An early decision was made by the Task Force that experts would be called upon when needed so that the group could shape their housing concept on their own, and not get railroaded into a concept that was not community focused. In hindsight, a developer could have been brought in at the beginning so that members could learn about the magnitude of a housing project and whether it was something that CDS should get involved in given its limited resources.

### **Lesson Learned No. 15: Assess whether the project fits with the strategic plan**

Make sure that your organization has a strategic plan and determine whether a project fits in with it. This should be done before a project is started, and also when an ongoing project evolves in a new direction. If it doesn't fit in with the strategic plan, then chances are there will not be the resources within the organization to deal with it. This can lead to stress at all levels of the project and organization and burnout.

### **Lesson Learned No. 16: Determine why people no longer want to be part of the project**

Find out why people stop participating and use those reasons need to adjust the process if possible. Unless you follow up with them you will not know if there is something fundamental in the process that needs to be addressed.

### **Lesson Learned No. 17: Evaluating the progress of the project**

Build into the process a time for reflection on what has happened and some official evaluation. Evaluation could look at things like why seniors were leaving the group, how to keep the RSHP seniors led. It is also a chance to let the group know how things are going from CDS's perspective.

### **Lesson Learned No. 18: Setting up a not-for-profit seniors housing society**

The housing project was supposed to have been turned over to a not-for-profit housing society. Yet few Task Force members wanted to become board members. The Task Force then wanted to set up a co-op but other needed to be explored.

### **Lesson Learned No. 19: Be more professional and less social**

An observation of one senior is that the Task Force should have been more professional and less social. The social aspect was important, especially when the group was starting up and people were getting to know each other. But we needed to shift gears into getting work done faster, and if that wasn't possible, to begin bringing in professionals for their advice.

## **7.3 Lessons Learned by CFCWest**

### **Project Start Up**

Ask more questions:

- Organization strengths and weaknesses – where best CFCWest can assist
- What exactly the organization sees as the end product of the project and how it will be used – clarifying what we are doing and why
- What is the plan for all funder/sponsor recognition
- Staff time allotment to project for all partners to create some realistic expectations

### **Processes**

- Ensure that the upfront processes are more complete. The Request for Proposal (RFP) for the researcher and business plan consultant were weak. CFCWest could have done more for CDS in this regard
- Contractors should have had more “check in” dates for progress reporting. CFCWest could have been responsible for this part of the monitoring (may have been more obvious if the above questions were asked)
- Pay the contractors based on deliverables rather than a monthly sum. The deliverables could have been defined initially in the RFP
- Map out a CDS/CFCWest internal work plan with dates outlined to help keep project on track
- Have all deliverables complete at least a month before project is due to the funder

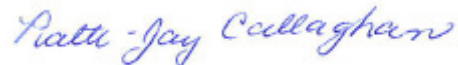
## Communication

- As a Community Economic Development (CED) coordinator at CFCWest, other than the occasional meeting at a training opportunity or conference, there is no defined way of sharing a project that is currently under way with other Community Futures (CF) organizations. Possibly with the new Rural Diversification Initiative (RDI) project, a quarterly CED "Bulletin" could be started. All CF's with a project can contribute their "in-progress" information for better sharing. Something very brief – and then a phone number/email to contact for more information.

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## 8 APPROVALS

Approved by



**Patti-Jay Callaghan**  
Executive Director  
Community Futures Centre West

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## **9 APPENDICES**

### **9.1 Attachments**

PDF – Land Donation Announcement

CD – Power Point Presentation for the Calgary and Area Community Development Conference

### **9.2 Invoice**

Invoice #11109

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