Introduction

Six community presentations were completed in Spring 2023 and highlighted the extraordinary desire of Wheatland residents to understand the varied upstream and downstream challenges in seniors housing and seniors healthcare in their own lives and in the community. In addition to overwhelming support for the new lodge/seniors housing project, we heard from residents that:

- **Municipal collaboration** should be pursued with not-for-profits (Wheatland Housing Management Body and Wheatland & Area Hospice Society), provincial (Affordable Housing Partnership Program), and federal (Canada Mortgage and Housing Corporation) housing partners that support residents' key values of family, community, and rural sustainability.

- Decision makers should focus their future actions on **coordinated planning and funding models** as put forward by consultants to minimize taxpayer impact and leverage available provincial and federal programs.

- The broader **social and economic benefits** of community seniors housing exceed the investment and sustainability costs on the service delivery side (The Need is greater than the Cost).

- Wheatland residents strongly recommend an "**all hands on deck**" and "put your shoulder to the wheel" attitude.

Thank you to all who attended the presentations, asked questions, signed petitions, and wrote letters to council members, as well as those who contributed content and revisions to presentation material during two arduous yet inspiring weeks. WHMB and WAHS recognize your diverse interests and your shared goal of advocating for seniors housing and hospice care, and your strength, honesty, and optimism has touched our hearts. Future community presentations will occur as the project continues to be refined.

Dr. Joni McNeely, Chair, WAHS

Denise Peterson, Chair, WHMB

Overview

The Need **Our housing challenge**:

- Average age currently is 85 years
- 1 in 4 seniors in Wheatland County require housing support [2,5,10]
- Total of 400 spaces required within 25 years (current lodge has 89 spaces) [10]
- Reasons to move to a lodge: lack of caregiver availability, loss of mobility within home, increasing social isolation, housekeeping and house maintenance difficulties, loss of driver's licence/distance to services

> This is what leaders do- set the parameters for the safe, reliable, high quality, and accountable models based on best evidenced data, technical insight, and engagement with the public. [8]

The Build **Our housing solution**:

- Multi-phased build on 7 acres east of Kinsmen Park
- Initial phase is 120 new spaces (and keep 89 existing spaces)
- 320 (vs 195) sq.ft with up to date standards, social and environmental improvements, state-of-the-art HVAC and infection control, and integration with park and downtown
- Room rents community affordable or community service (a community appropriate model of low-income rent)
- Future expansion space prepared and available

> Building on successful examples and applying their lessons should be a part of reform, rather than ruling in/ruling out any one particular model.[8]

The Cost **Our housing pledge**:

- Project budget estimated at $53M.
- Further cost refinement as project management progresses to Class C Budget and Tender Ready proposal.
- Funds pursued by WHMB:
  - o $6.04M by municipalities based on equalized assessment (land and improvements value) set by Gov AB. Our "Down Payment".
  - o $7.14M by Gov AB as a grant- proposal submission deadline June 30,2023
  - o $39.5M by CMHC as a mortgage/loan at 2.8% interest and potential of $2.6M forgivable if mortgage payments are made annually for 10 years.
- $700k Annual WHMB requisition to municipalities is our "Mortgage" to pay back CMHC loan in 50 years.
- Innovative revenue model will supply up to $100k surplus caused by efficiencies of new building and equipment. This could be used for faster mortgage paydown or lower requisitions AND no new WHMB operating requisitions for additional 120 beds.

> Collaboration and common cause among governments and community groups are required to mobilize quickly… we can no longer ignore the inextricable link that health and wellbeing have on our economic resiliency and visa versa. [9]

Numbers

Project assembly of capital is demonstrated below:

Capital Funding Source	$ Equity
CMHC Loan	$ 36,917,429
CMHC (loan 'forgivable')	$ 2,636,959
CMHC Loan - subtotal	**$ 39,554,388**
Province Partnership Program	**$ 7,140,000**
Municipal Land Contribution	**$ 1,400,000**
Municipal up-front equity	**$ 4,644,796**
Total Resources	**$ 52,739,184**

WHMB is entering Phase 1 of a large, multi-part building and design process.
As with any major project, there is much to consider and many moving parts. With each phase (there are 4) we will have clearer financials and hope for respect and patience during the process.

Number of communities presented to: 6
Number of people attended: 353
Petitions signed: 508+

The one-time capital requisition is demonstrated below based on equalized assessment (the down payment):

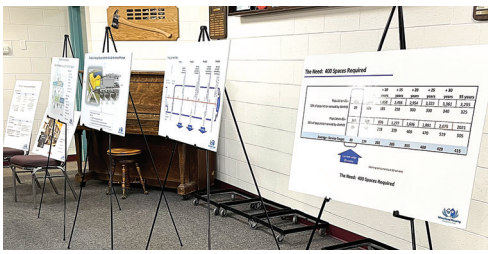
	Equalized Assessment (current)	Land Equity Contribution	$ Equity	Total Contribution
Wheatland	65.94%		$3,985,914	$ 3,985,914
Strathmore	32.53%	$1,400,000	$566,625	$ 1,966,625
Rockyford	0.50%		$30,224	$ 30,224
Standard	0.75%		$45,463	$ 45,463
Hussar	0.27%		$16,571	$ 16,571
One Time Requisition Total		**$1,400,000**	**$4,644,796**	**$ 6,044,796**

The annual requisition demonstrated below is based on 50 year amortization (paying off the mortgage:

	Equalized Assessment (current)	Annual Requisition 50 yr amrotization	CMHC Loan Value and Municipal Allocation
Wheatland	65.94%	$ 461,577	$ 26,082,000
Strathmore	32.53%	$ 227,739	$ 12,868,695
Rockyford	0.50%	$ 3,500	$ 197,770
Standard	0.75%	$ 5,265	$ 297,487
Hussar	0.27%	$ 1,919	$ 108,436
Annual Requisition Total		**$ 700,000**	**$ 39,554,388**

Estimates are for up to $100,000 surplus revenues generated by lodge rent, services, and loan forgiveness. The extra money could be used to pay the debt/mortgage faster or with lower requisitions.

Timeline



Phase 1

Project Manager hired
Conditional municipal commitment
Class C budget prepared
Endpoint: AHPP submission (June 2023)
Revised project schematics

Phase 2

Municipal reporting and commitment confirmation
Class B budget prepared
Endpoint: AHPP approval
CMHC submission
Advanced project schematics

Phase 3

Municipal reporting and commitment confirmation
CMHC approval (Term Sheet)
Endpoint: Tender ready project

Phase 4

Municipal reporting and commitment confirmation
CMHC approval
Endpoint: Construction contract

Derek Weiss
Independent Consultant

Berry Architecture
and Associates

M3 Development
Management

Support

> The HOA believes in the future need of such facilities due to the limited spaces currently available and the growing population of the baby boomer demographic. This is a perfect opportunity for Wheatland County and Strathmore to be leaders in this area…
>
> *TM and MH, Lakes of Muirfield Home Owners Assoc*

> We do this because it brings our community together and gives us hope that we are doing something to better our future…
>
> *MG, 4th generation resident of Wheatland County*

> As a resident of the county, I feel it's important to build community that supports all facets of life. Seniors have had a life time of paying taxes and growing our communities. We need to RESPECT that.
>
> *DC, County resident*

> …when a senior starts to deteriorate in the community they are identified by numerous sources but if there is no place for them to go often the only option is an acute care bed. This has far reaching consequences… resources are strained.
>
> *AMG, from 40 years nursing career*

> As a resident of the county of Wheatland for over 55 years and a taxpayer I am very concerned with the limited number of available lodge rooms in this area moving forward. This joint facility makes a lot of sense to my wife and I…
>
> *BG, Standard AB*

> I have the greatest respect or the individuals who are trying to bring this essential piece of health care to our community.
>
> *LH, County resident*

Conclusions

There was overwhelming support for the New Lodge Build project at the community presentations and in many locations 100% of residents expressed their approval. However, there were common themes noted in the discussions and follow-up correspondence with WHMB and WAHS:

A. Confusion still exists about differentiating Housing vs. Healthcare roles and public, private, and not-for-profit resources for each in our community facilities and homes.

Advancing the vision: *Continued education to our community about responsibilities of various provincial ministries and community providers, including municipal governments to supply Housing needs.*

B. Difficulty understanding County Council's hesitancy and/or lack of acceptance of project build costs and future refinements, proposed operating models, or their own financing models to support this project.

Advancing the vision: *Provide ongoing opportunities for communication between WHMB project consultants and County administration to address councillors' concerns.*

C. Frustration in perceived conflicting roles and objectives of councillors to advocate for direction set by community boards to which they are appointed, as the appointments carry definite responsibilities laid out by the Ministry.

Advancing the vision: *Encourage and expect within our community and work environments respect, responsibility, and professional excellence while safeguarding each organizations mission, goals, and values. Encourage municipal councils and WHMB to collaborate and provide appropriate on-boarding and in-services highlighting roles and responsibilities.*

D. Intense personal responses were noted in all community presentations about close family members receiving housing support at the current lodge and the emotional, social, and physical benefits provided to themselves, family, and the community in general. Speakers expressed fear that delays in building a new lodge would require many community members to seek lodging elsewhere or be at risk if choosing to stay in their own home.

Advancing the vision: *Recognizing that each of us has a role to play in our own unique way to contribute to the growth and sustainability of our community as a whole, WHMB can further support and advocate for seniors and their value within Wheatland County.*

Sources

1. Dr. Martin Labrie; University of Calgary Compassionate Community Engagement Wheatland Study, 2018
2. Gordon and Associates; Seniors Housing and Hospice Needs Assessment and Buisness Case, 2019
3. Berry and Associates; WHMB and Hospice Community Engagement and Schematic Design sessions, 2021
4. Government of Alberta (Health); Advancing Palliative and End of Life Care in Alberta, 2021
5. Government of Alberta (Seniors and Housing, Health); Strathmore LGA Seniors and Community Profile, 2021
6. MeyersNorrisPenny; Improving Quality of Life for Residents in Facility-Based Continuing Care, 2021
7. Covenant Health Palliative Institute; Building Compassionate Communities: Raising Awareness of Palliative Care and Advance Care Planning in Alberta, 2022
8. Government of Alberta (Seniors and Housing); Stronger Foundations: Alberta Affordable Housing Partnership Program, 2022
9. Public Policy Forum; Taking Back Health Care How to Accelerate People-Centered Reform Now, 2023
10. Derek Weiss, independent consultant; WHMB Need, Funding, and Financing Presentation, 2023