

# \*THE EVERGREENS FOUNDATION

## BUSINESS PLAN 2018-2022

### *Executive Summary*

The Evergreens Foundation was first created as a Corporate Body April 11, 1960 by order of the Lieutenant Governor and was recognized as a Management Body under the Alberta Housing Act on January 1, 1995. Over these past 55 years the Foundation has continued to grow and evolve in response to our society's changing needs and demands.

In accordance with our mission statement, *“The Evergreens Foundation will provide, in a respectful and supportive manner, a continuum of housing options that promote quality of life and independence,”* we provide housing to a broad spectrum of the population. Services are offered through the Lodge Program which encompasses Supportive Living Level 2 (SL2) up to SL4. Independent seniors of modest income also have access to self-contained apartments. Low-income families, singles and AISH clients are supported through provincially or municipally owned housing units, or by the provincial rent supplement programs that The Evergreens Foundation administers.

The Evergreens Foundation Board of Directors currently has chosen not to actively pursue the avenue of Affordable Housing. Our exception is Whispering Pines Lodge in Grande Cache which was constructed with the assistance of an Affordable Housing grant. This lodge is a meld of Affordable Housing and the more typical Lodge Program. Private developers have built Affordable Housing units in Hinton, Edson and Jasper, presently relieving The Evergreens Foundation of the responsibility to build and maintain such units themselves.

In keeping with our Vision, *“A community-based Foundation providing great places to live,”* The Evergreens Foundation has broadened its scope by partnering with Alberta Health Services at three of our five lodges. This partnership allows our Foundation to continue to offer high quality housing, while permitting AHS to supply the necessary health supports to our residents. Currently, The Evergreens Foundation manages 16 Designated Assisted Living (SL4) units at Alpine Summit Seniors Lodge in Jasper. Further, Alberta Health Services contracts 15 Designated Access Spaces (SL3-4) in Whispering Pines Lodge, Grande Cache, and 10 SL3 Designated Access Spaces at Parkland Lodge, Edson.

The Board of Directors has approved the expansion of Pine Valley Lodge in order to meet the growing demand of seniors' in the community and the surrounding Yellowhead County area. In 2014, Affordable Supportive Living Initiative (ASLI) grant applications were submitted to the province for these two sites. Although neither were successful for ASLI funding, Parkland Lodge did obtain approval for a Lodge Renewal Fund grant in the amount of approximately \$12.2M. We

were then awarded an additional 5.4 M in December 2016. We are happy to say the project has been awarded to Scott Builders and we just had the sod turning for this project September 11, 2017. We are anticipating a 24 month construction period at which time we will open our 105 unit facility. There are currently no approved projects in Hinton. The Pine Valley Lodge expansion plans were resubmitted to Alberta Seniors and Housing in 2016 and early 2017 for further consideration.

## ***Organization Overview***

### **Housing Portfolio**

The Evergreens Foundation manages housing throughout Yellowhead County, the Town and Improvement District of Jasper, a section of the M.D. Greenview #16 and the towns of Hinton, Grande Cache and Edson. In recent years, we have expanded into Parkland County, from Highway 759 to the eastern border of Yellowhead County. Residents in that area of Parkland County primarily access our Sunshine Place Lodge in Evansburg.

The Town of Jasper lays claim to our newest lodge, Alpine Summit (37 units), which opened in 2008, and Pine Grove Manor, a 33-unit seniors' self-contained apartment. Moving 90 km east, Hinton's housing is composed of Pine Valley Lodge (30 units), Lion's Sunset Manor (32 units, seniors' self-contained), a special needs house and 12 low-income family dwellings. Grande Cache offers the beautiful Whispering Pines Lodge, a 30 unit facility which is conveniently attached to the Healthcare Centre. The Town of Edson, where construction is taking place, has the oldest and largest of our lodges, Parkland, with 55 units. This will increase to 105 after construction. This property is beautifully enhanced by gardens and gazebos developed by the Parkland Lodge Auxiliary with the support of many charitable donations and volunteer workers. We are temporarily housed in the Old Edson Healthcare Centre. It was a difficult process but we were able to secure a residential style lease on an acute care facility. This was the first of its kind in the Province of Alberta. Edson also accommodates low-income seniors in Heritage Court and Heatherwood Manor. An additional 7 townhouse units are located here for the benefit of families in need of assistance. Finally, Evansburg houses over 30 seniors in Sunshine Place Lodge, which is attached to Pembina Village, a long-term care/dementia cottages facility. The entire building, including our lodge, is staffed by The Good Samaritan Society.

In addition to the foregoing, The Evergreens Foundation administrates Rent Supplement Programs throughout its entire jurisdiction on behalf of the Government of Alberta.

**Please see Appendix B for a full listing of The Evergreens Foundation's housing portfolio.**

## **Services or Products**

Rating criteria for all prospective residents are established in accordance with the Alberta Housing Act. Seniors within our *Lodge* program may avail themselves of many supportive services, such as meals, housekeeping and activities. Our lodges have 24 hour staffing to provide necessary supports and security to our residents. Home Care provides services, including the Medication Assistance Program (MAP), to their clients living within the lodges. Access to transportation, regular exercise schedules and personal care services are also available at our Lodges. Families, singles and seniors who live in our Manors, townhouses or houses are provided with safe and affordable *housing*. Any other necessary supports must be obtained through other government agencies, such as Social Assistance. Ever mindful of the needs of our senior citizens, The Evergreens Foundation continues to offer more and more healthcare services in partnership with Alberta Health Services. In an effort to make the public aware of the services we provide to families and individuals, The Evergreens Foundation maintains a website: [www.evergreensfoundation.com](http://www.evergreensfoundation.com) . We can also be accessed through Facebook and Twitter.

## **Clients**

Presently, The Evergreens Foundation serves approximately 180 seniors through the lodge program, with over 96 currently on the waitlist (77% of waitlist is in Hinton and Edson.)

Waitlist averages in **Edson** have grown consecutively from 15 in 2011, 23 in 2012, 30 in 2013, 42 in 2014, **40** in 2015 and 2016 to 43 in 2017. The current lodge has 55 rooms. The current housing situation at the interim housing site will make it possible to fill a few extra rooms while awaiting construction completion. These rooms are expected to be available in late 2017.

**Hinton** has remained more consistent, from 23 in 2011, 29 in 2014, 36 in 2015, 26 in 2016 to 31 in 2017. The current lodge has 30 bachelor style suites.

There are an average of 120 seniors living in the self-contained apartments, with a modest, lightly fluctuating waitlist. Twenty-one different families are dwelling in our housing units and nearly 160 are assisted through the Rent Supplement programs (waitlist averages 30-50.) We will see

some changes to scoring and asset levels in our Social housing program in early 2018 with the implementation of the new Provincial Housing Strategy. We feel this will impact our waitlists and scoring dramatically.

**Please see the section, “Environmental Scan” for further details.**

### **Community Based Organizations**

The Evergreens Foundation works closely with various groups within the communities it serves. Volunteer-based “auxiliaries” or resident-based groups are active at each lodge location. These groups work with the local Activity Co-ordinator in hosting fund-raising activities and organizing special events for the seniors and visitors from the community. Other groups include bus societies, other senior groups and the Hinton Resident Care Foundation. The managers of our Social Housing portfolio work closely with Alberta Human Services, Family and Community Support Services (FCSS) and the Yellowhead Emergency Shelter for women. It takes many great organizations and hard-working people to provide all the necessary supports to the community!

### **Competition**

The Evergreens Foundation is happy to see the addition of Affordable Housing units in various communities throughout our region. These units are of particular benefit to the individuals and couples who work in the service industry at minimum wage.

The Good Samaritan Society (GSS) and the Pembina Housing Authority are the only other housing authorities that work within our boundaries; both groups operate in Evansburg (for a total of 3 housing organizations). The GSS also operates a Level 4 facility in Hinton. They have recently given notice of their desire to sell this facility giving first right of refusal to Alberta Health Services. We as a foundation are feeling the pressure of this at our Pine Valley Lodge as they are taking in a minimal amount of clients at that site. The massive care gaps in Hinton are in Supportive Living 3 and Long Term Care.

Further, rather than competition, there are very limited housing supports in our entire area for non-seniors with mental or physical disabilities. Pressure is often put on The Evergreens Foundation to accommodate such individuals within our lodge program. Offering such supports is not generally embraced by the Foundation for a variety of reasons: (1) we may not have appropriately trained staff, (2) we generally don't have the availability, (3) the culture and activities within the lodges

are geared to seniors and (4) by accommodating non-seniors we may deny qualifying senior citizens of housing. We are interested to see how the addition of a tenant support staff worker as outlined in the Provincial Housing Strategy may change that position going forward.

## **Associations**

The Evergreens Foundation holds membership in the Alberta Seniors Communities Housing Association (ASCHA), Alberta Public Housing Administrators' Association (APHAA), Alberta Managers Society (AMS), and the Lodge Activity Coordinators Association of Alberta (LACAA.) These associations engender province-wide support, training and advocacy among the many housing authority members.

**ASCHA** strives to be, "The voice and champion for seniors housing." ASCHA primarily accomplishes this through advocacy at the government levels. This group is fully supported by our Board of Directors. ASCHA also sponsors accredited classes at Red Deer College which have been utilized by some of our senior management.

**APHAA** is proving to be an integral avenue for training new Chief Administrative Officers. In 2009, APHAA released its Education Modules through which all CAO's are able to receive certification. Recently, APHAA sponsored Leadership Training at the Banff Conference Centre. APHAA also manages a member's only email network which is well utilized by the directors of the many housing organizations throughout the province.

The **AMS and LACAA** offer supports to both the Lodge Managers and the Activity Coordinators throughout the province. These groups offer biannual conventions and networking opportunities for members.

## **Accountability**

The Evergreens Foundation is accountable to its many stakeholders. Although the Ministry to which the Foundation reports may change from time to time (currently, the Seniors Ministry), our actions are always governed by Ministerial Order and *The Alberta Housing Act and Regulations*. Pursuant to these documents, the Foundation is led by a Board of Directors, each appointed by one of the member municipalities or towns (see [Appendix A.](#))

Board meeting minutes are dispensed to the member municipalities and made available to the public. All properties receive regular inspections from the Public Health Inspector, local Fire Departments, the Supportive Living Accommodations Licensing department and Alberta Health. Our goal is always to exceed the expectations.

## ACCOUNTABILITY STATEMENT

*“The business plan was prepared under the Board’s direction in accordance with legislation and associated ministerial guidelines, and in consideration of all policy decisions and material, economic, or fiscal implications of which the Board is aware”. Approved by the Board, October 23, 2017.*

## INSTITUTIONAL CONTEXT

People often do not know about The Evergreens Foundation– until they need us. At that moment, we become an integral component in their lives – young mother’s fleeing an abusive relationship, singles and families unable to make ends meet, son’s and daughter’s desperate to find a safe and affordable home for mom or dad. We help as many as possible with the funding and accommodations that are available. We manage our Rent Supplement budget efficiently to allocate funding to as many needy individuals and families as we are capable of.

Times are changing with our senior population; the statistics are there – a senior BOOM has arrived. We are preparing to handle, not only the seniors of today, but the seniors in the decades to come. It is well-recognized that seniors are staying at home longer - wonderful if they are enjoying quality life in a safe setting – but the reality is that many seniors are living at risk in the rural communities. At the juncture when they realize they need assistance, they are often far past the once-typical lodge level of care. Healthcare support is a critical component in the lodge program today. Our Foundation has worked hard to develop a strong, open relationship with Alberta Health Services, recognizing them as an essential component in providing quality care to our seniors.

There are certainly those within our area that champion senior’s rights. The Resident Care Society in Hinton works diligently at their fund-raising campaigns to provide enhanced care to our citizens. They are waiting for the word, “Go!” from The Evergreens Foundation to promote our expansion project and fund-raise to help furnish it. The local auxiliary will work hand-in-hand with them.

We have been seeing in recent years the push for housing on the east end of Yellowhead County. This area has a large demographic of aging population and very little to no housing options in the Hamlets and County area. Yellowhead County councillors and community advocates have been hosting meetings and reaching out to their citizens on what strategies may work and what role The Evergreens Foundation may play in assisting with this demand.

## PLAN DEVELOPMENT

### Plan Development

The Board of Directors is engaged in setting the direction of our Foundation. They have ensured that the plans for The Evergreens Foundation is aligned with the 2017-2020 Government of **Alberta Strategic Plan**; the primary focus for our Foundation being Strategic Priority “Seniors have access to programs, services and supports that help them live safely and independently in their chosen communities” Further, the **Alberta Seniors and Housing Business Plan 2017-2020** highlights the need for “all Albertans to have access to appropriate housing and related supports”. In the rural setting our board is keenly aware of the importance of linking both housing and services in all aspects of our housing portfolio. The Business Plan also acknowledges that the senior population is growing by approximately 60 people each day. Seniors are more diverse, are living at home longer and have higher demands than the previous generation. We must strive to meet the needs and wants of today’s seniors in order to provide them with the high quality of life that they have earned.

According to the *2012-13 Annual Report of the Seniors Advisory Council for Alberta*, “By 2030, the baby boomer generation will finish turning 65 and by then, it is estimated that more than one in six Albertans will be a senior,” or, as stated in the *Aging Population Policy Framework*, “there will be more than 923,000 seniors.” The Seniors Advisory Council report also noted that “the cost of accommodation has increased in many communities and affordable accommodation options have narrowed. The private, not for profit and public sectors all have important roles to play in the community to ensure seniors have access to safe, affordable and appropriate accommodation.” The Environmental Scan will show how our communities measure up to the provincial trend.

**The Evergreens Foundation’s Board of Directors** are members of the supporting municipal and town councils; in fact, we have been privileged to have many Mayors sit on the board throughout the years. These devoted men and women are eager to meet the needs of their communities - not only today’s needs, but those of the future. Most of the communities have entered into partnerships with other groups or the private sector to supply Affordable Housing in their area which allows The Evergreens Foundation to concentrate on expanding seniors housing and supports.

The Evergreens Foundation does not conduct its own Housing Studies primarily because we support seven towns/municipalities and do not have the manpower to effectively carry out such a vast task. Instead, as shown in the appendices attached to this document, **Housing Studies** have been conducted by the supporting communities when and as necessary. In turn, these studies have been shared with The Evergreens Foundation as a basis for requesting further housing support. The Board of Directors work together effectively in determining the community or sites in greatest need and how each could best be assisted.

Annually, the Board meets to update its **Strategic Plan** and to provide direction on any needed revisions to the Business Plan. Input from all Board representatives are considered. Further, the

**frontline management** team meets quarterly, including one annual meeting with the Board and Administration team, to discuss any issues, voids and successes. **Resident surveys** and related action plans are developed and reviewed by the Operations Manager, then presented to the Board prior to implementation by the managers.

Regular consultations have continued between the **AHS Capacity Planning** department and the CAO regarding any healthcare-related deficiencies in our area. Conversations are encouraged between AHS and The Evergreens Foundation team members, at all levels. Our mutual goal is to house our residents with the most appropriate levels of care and supports. We have struggled with the inability to sign more Designated Access Space contracts with AHS in Hinton due to the “C” building code, but have been recently successful in extending home care hours at that site. Again, the Board is in full support of our contracts with AHS.

The Evergreens Foundation’s CAO has made **council presentations** when requested, and in recent months been in contact with the Seniors Ministry and Alberta Health Services for the Hinton expansion project.

**ALL preceding methods of communication and reports provide valuable input into the strategies and overall business plan of the Foundation.**

## **ENVIRONMENTAL SCAN**

The Board has recognized these strengths, weaknesses, opportunities and threats/challenges to The Evergreens Foundation:

### **Strengths:**

- The Board of Directors
  - Cohesive, engaged and adaptable group
  - Supportive of the EGF mission and EGF communities as a whole
  - Empower their Administrative management team to successfully lead the Foundation towards its goals.
- Solid Lodge Program
  - Financially supported through requisition
  - Well-maintained, properly staffed lodges
  - Good distribution of facilities
  - Meets all supportive needs of residents, including healthcare
- Strong management team, led by the CAO and inclusive of Operations Manager, Human Resources Manager and Finance Manager
- Volunteers/auxiliary groups working at each lodge

### **Weaknesses:**

- Large geographic area
- Excessive costs related to travel, incl. shipping, contractor costs
- Small lodges and apartments make for inefficient operational costs
- Remote communities have higher cost of living
- Waitlist numbers increasing in 4 out of 5 lodge sites
- High cost of living in area and generally above average wages impact budget

- Diminutive skilled labour-pool to access in smaller communities

### **Opportunities:**

- Can assist rural residents to age in place
- Have our own land on which to expand our lodges
- Could expand contracts with AHS Designated Access Spaces
- Current mindset of Board, Councils and Government to expand senior services
- Awarded funding for Parkland Lodge expansion

### **Challenges (Threats)**

- Ability to keep up with the right housing at the right time at the right place
- Seniors' incomes don't increase at the same rate as our operational costs, thus requisitions must increase or alternate sources of revenue must be developed
- Stagnant funding in Social Housing programs means less money for operational and preventative maintenance
- Change in governments and staffing create lack of continuity
- Seniors have higher expectations for housing services

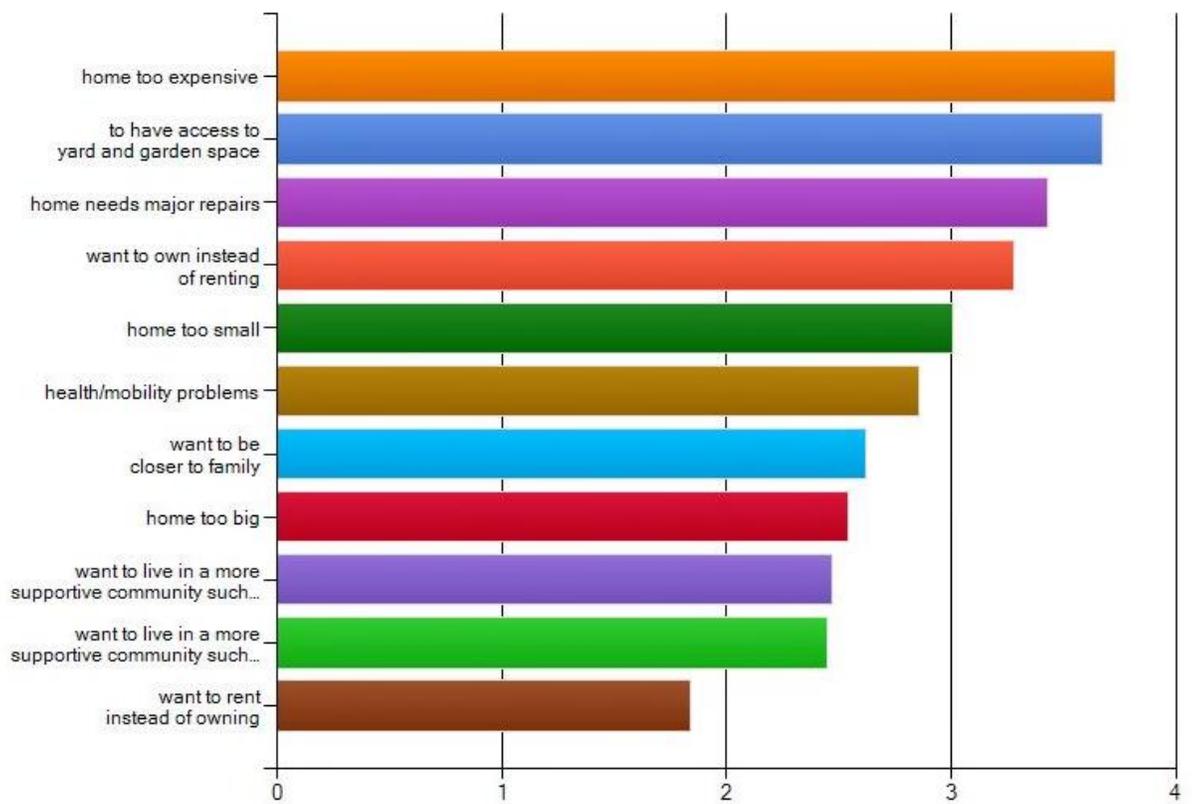
### **Appetite to meet the Challenges**

The **Town of Hinton** has been aggressively confronting its housing crisis at all levels. Throughout Hinton's many housing forums and integrated Need and Demand Housing Studies, seniors' housing needs have also come to the fore. At every opportunity, the Mayor rallies the appropriate Ministry for increased housing and senior supports.

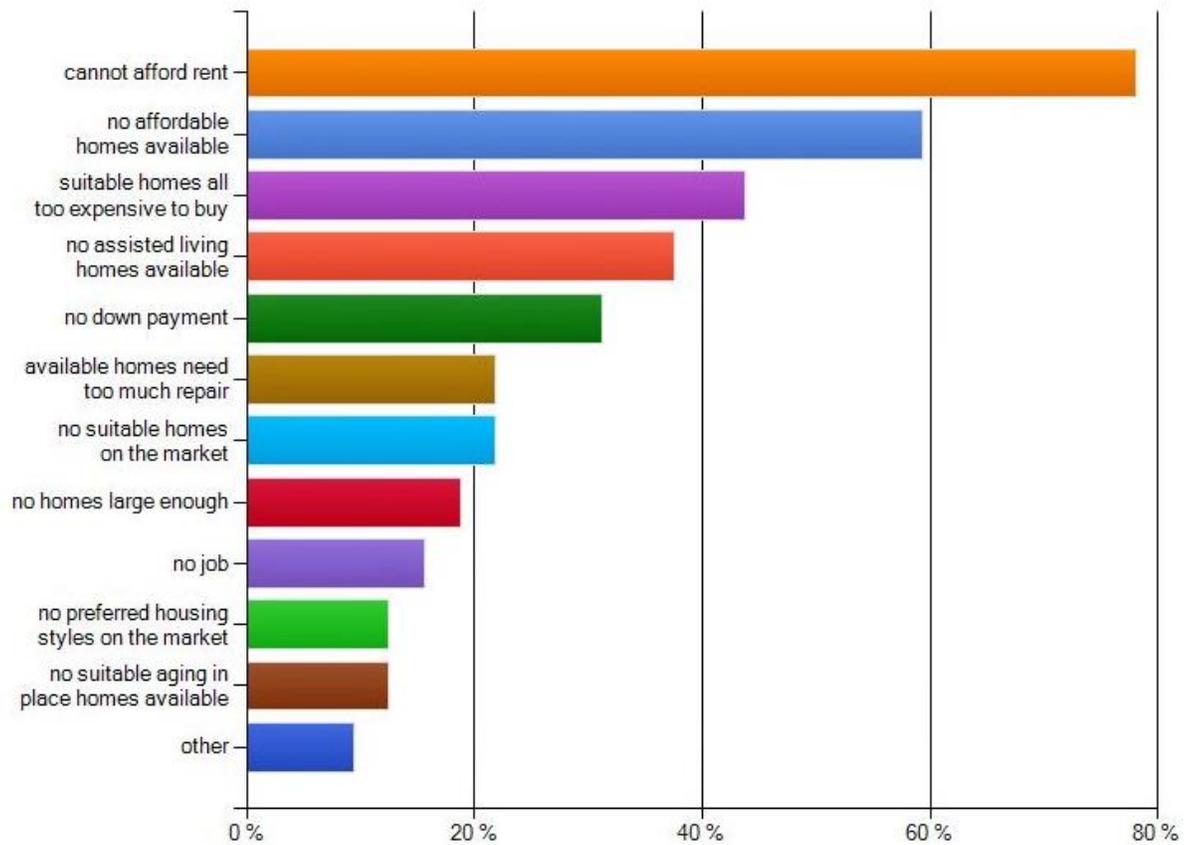
Likewise, **Yellowhead County**, which surrounds Hinton and Edson, has been conducting seniors' housing studies. Yellowhead County has been exploring the feasibility of introducing more supports into very small communities, such as their hamlets. The county does however recognize that residents rely on the Town of Hinton and the Town of Edson for many services. Further, Yellowhead County council, who supplies over 50% of our requisitioning base, does support the expansion of the lodge in Hinton recognizing that an expansion to the east would be the next logical move for the Foundation

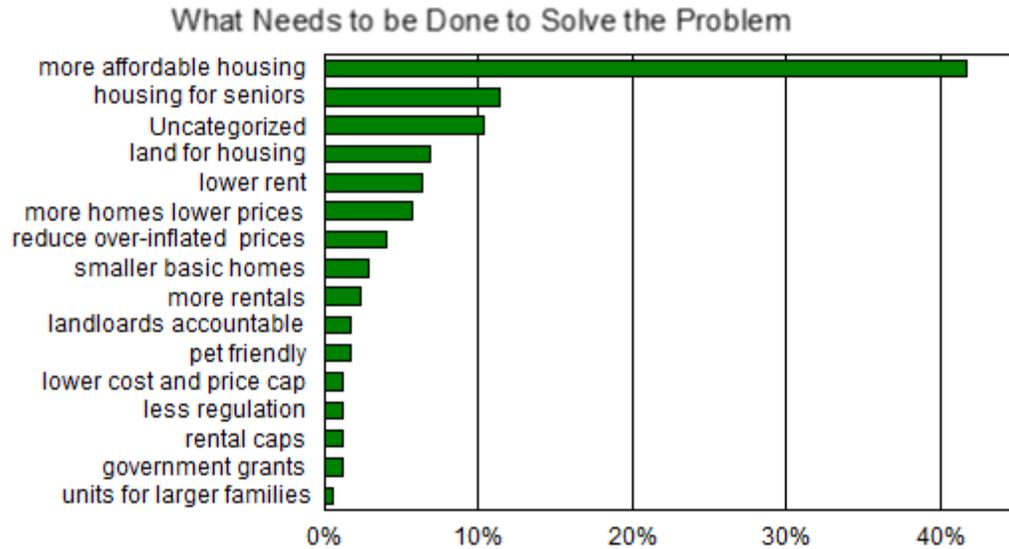
***From Hinton's Needs and Demands Study:***

**Please review and rank in order of importance the reasons you anticipate would prompt you to consider moving. (please select all that apply)**



**Why can't they find a suitable home? (Please select all that apply and generally describe)**





These graphs highlight housing needs across a broad spectrum, but seniors housing and supports are certainly one of the priority items. A lodge expansion, inclusive of market rent suites would be highly supported in Hinton.

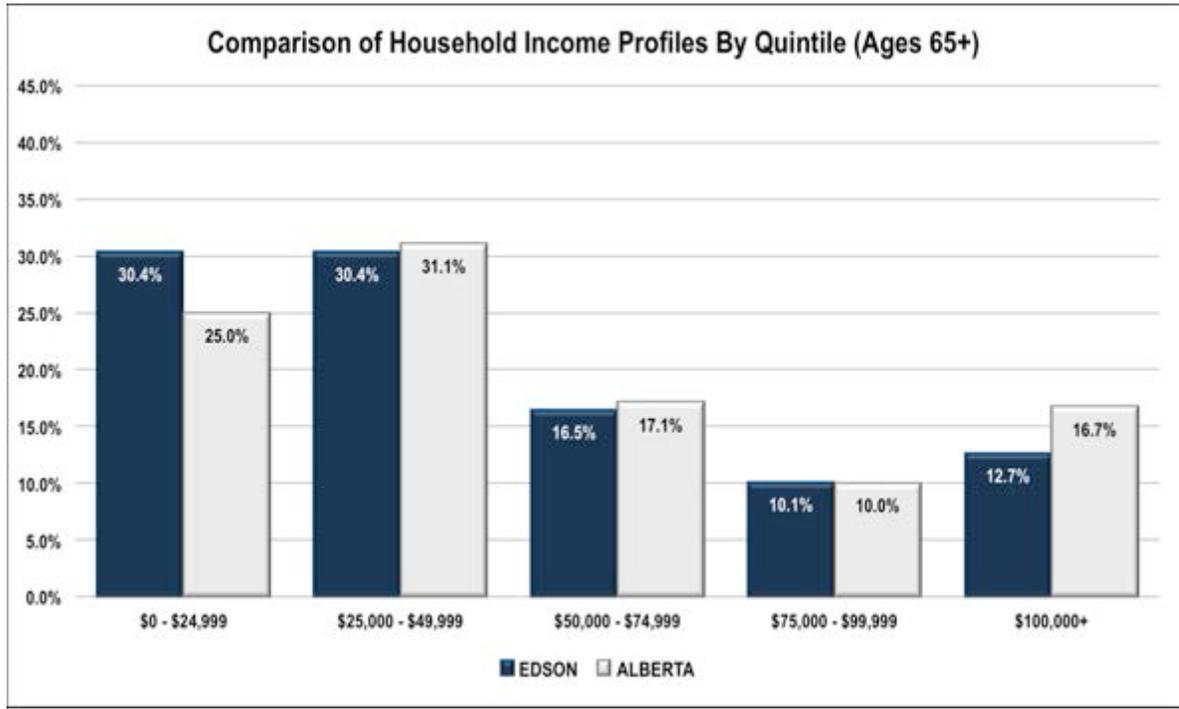
***Excerpts From: Yellowhead County’s Senior Housing Review 5.0:***  
*(Please note the full report was submitted with the 2015 Business Plan, can be forwarded upon request.)*

- ...the Province of Alberta (through Alberta Treasury Board and Finance) has developed population projections for each of the 19 Census Divisions in the province to 2041...it is estimated that **between 2011 and 2041**, the seniors population [*in our division*] **will increase incrementally from 10.5% to 21.7%...reach[ing] their peak in 2036.**
- ...projections suggest that within the next two years (i.e. **2016**), **there could be as many as 1,755 seniors 65+ living in Yellowhead county** (including up to 655 seniors 75+.) Over the next 15-20 years, that population could grow to the following:
  - ◆ 2021: 1,685 – 2,150 seniors 65+ (including 610 – 780 seniors 75+)
  - ◆ 2026: 2,080 – 2655 seniors 65+ (including 805 -1,025 seniors 75+)
  - ◆ 2031: 2,350 – 3,000 seniors 65+ (including 1,015 – 1,300 seniors 75+)
  - ◆

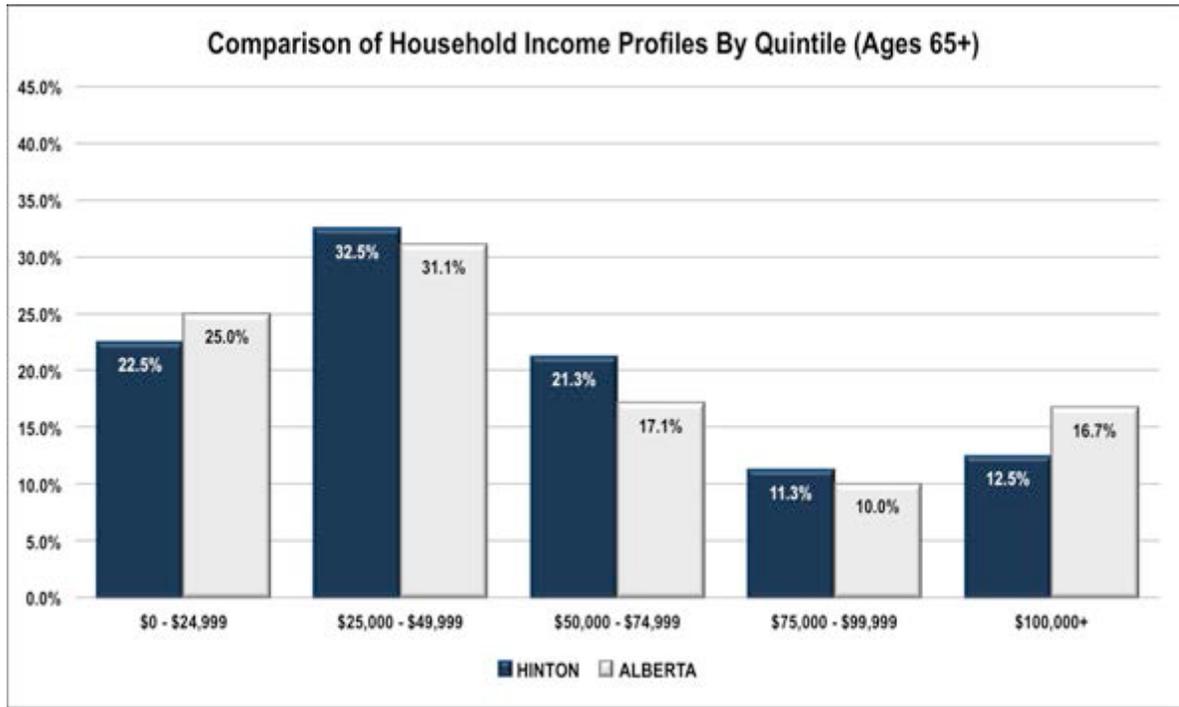
The vast majority of seniors in our area will continue to lie within the low to moderate income levels. The lodge program is geared to help the needs of seniors in these brackets. However, there are no private or for-profit housing *with supports options* for seniors in the mid to high income brackets in our area. The Evergreens Foundation is “the only game in town.” Our Foundation wants to ensure every senior has access to supportive housing and feels seniors should not be discriminated by income level.

## Yellowhead County's Senior Housing Review; Chapter 3 Household Incomes

### Edson



## Hinton



# GOALS, STRATEGIC PRIORITY INITIATIVES, EXPECTED OUTCOMES AND PERFORMANCE MEASURES

Please see [APPENDIX F](#) for our STRATEGIC PLAN.

## FINANCIAL PLANS

The **Operating Financial Plan** and the **Capital Financial Plans** are included as **Appendices** in this report.

Per the Business Plan Guidelines provided by the Housing Division, Alberta Seniors, **please note the following assumptions made in the preparation of these financial plans:**

\*\*\*\*We have assumed that there will be no increase to the Social Housing funding for the duration of this plan and minimal Lodge Accommodation Program (LAP) funding. However, Administration costs, Human Resources budgets, contractor fees and utility prices will continue to rise according to the cost of living and market fluctuations. *Therefore, all shortfalls can only be (1) added to our residents' rents, (2) be offset by reducing our maintenance budgets, and/or (3) be added to the Municipal Requisitions.*

**CONCLUSION:** As demonstrated through this Business Plan, including the Strategic Plan and Capital Plan, The Evergreens Foundation is poised and ready to tackle the senior boom in our area. In 2005 and 2008 we opened new lodges in Grande Cache and Jasper, respectively. Both of these lodges have filled a void in their community by supplying affordable, safe, yet home-like housing for seniors. We have just began construction of Parkland Lodge in order to provide more appropriate housing to the seniors of Edson and Yellowhead County. By the addition of 1-bedroom lodge suites we will provide assistance to the moderate income seniors who are in need of supportive housing. The affordable studio-style suites will benefit the modest-income senior and a contract with Alberta Health Services will help all those in need of enhanced healthcare. Our Board has reaffirmed our Foundation's commitment to a lodge expansion in Hinton being shovel ready in late 2018 while simultaneously planning an expansion into the East end of Yellowhead County. We will continue to support our senior citizens where and as they need it so they may enjoy happy and fulfilling 'twilight years.' Our Foundation truly is in tune with the needs of our senior citizens and, by virtue thereof, in line with the goals of Alberta's Seniors and Housing Ministry and our Premier.

## **LIST OF APPENDICES:**

**APPENDIX A: CORPORATE PROFILE**

**APPENDIX B: PROPERTY PROFILE**

**APPENDIX C: FINANCIAL PLAN**

**APPENDIX D: CAPITAL MAINTENANCE AND RENEWAL**

**APPENDIX E: CAPITAL IMPROVEMENTS PVL AND YELP**

**APPENDIX F: STRATEGIC PLAN**

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