Affordable Housing for Mutual Inclusion

Options for Individuals with Developmental Disabilities + Medical Complexities

Roadmap Report

June 2022

Reena

safe haven

SHS CONSULTING

Contents

Acknowledgements

1 | *Introduction*

> **Social inclusion** is the process of improving the terms on which individuals and groups take part in society—improving the ability, opportunity, and dignity of those disadvantaged on the basis of their identity.
>
> It is a situation in which individuals have the resources and opportunities to be involved in society to an extent that is satisfactory to them. Working towards social inclusion means findings and using measures to reduce barriers that restrict the resources and opportunities of disadvantaged groups.

NHS Glossary of Common Terms, 2018

Introduction

People with developmental disabilities and medical complexities have endured a history of stigma, segregation, and neglect in Canada. They continue to face tremendous difficulties obtaining **suitable, affordable housing** that meet their **physical**, **financial**, **social**, and **emotional needs**.

Through advocacy and research, better housing options are being developed to help people live with autonomy and dignity. This NHS Solutions Lab aims to build on existing work by fostering social and economic inclusion in creating intentional environments where people with developmental disabilities may thrive while having access to new opportunities.

By applying a design-led approach, this Lab sought to explore new concepts and ideas for housing that would foster the kinds of daily experiences that people with developmental disabilities and medical complexities seek. Along with envisioning the future of inclusive housing and communities, we were interested in exploring new ways of creating housing beyond traditional development approaches, with an intentional focus on bringing people together – both in the process and in the co-created spaces.

Home   Belonging   Affordability

Why focus on inclusion?

Adequate housing is about more than just meeting physical needs. Fostering social inclusion and a sense of belonging is critical to creating homes and communities where people can thrive.

While there has been much research on the physical attributes of housing for people with developmental disabilities and medical complexities, there is a knowledge gap in how to create housing that facilitates greater social inclusion and meaningful participation for this population. In many communities, individuals face increased levels of social exclusion and "face discriminatory views about their ability to live independently and contribute to society"[1].

There is a need for a new approach to creating housing that supports deep integration of people with developmental disabilities and medical complexities into the communities where they live. These deeply inclusive environments, where people have opportunities to form natural relationships through everyday interactions, can lead to better health outcomes and increased opportunities for individuals with developmental disabilities and medical complexities while leading to benefits for the broader community.

[1]CMHC. 2021. Literature Reviews On Housing Needs: Developmental Disabilities, 2019. Retrieved from: https://assets.cmhc-schl.gc.ca/sites/cmhc/professional/housing-markets-data-and-research/housing-research/research-reports/housing-needs/understanding-housing-needs/understanding-housing-needs-people-developmental-disabilities-69757-en.pdf

Pathways to Inclusion

As a starting point, the Lab Team was interested in exploring the concept of **reverse inclusion**[1] in the context of housing, where the housing would be *intentionally designed for the needs of people with developmental disabilities and medical complexities while inviting other individuals in the community to live, work, and play in these environments.*

Over the course of the Lab, this concept morphed from **reverse inclusion**, which focuses on the role of housing providers to facilitate inclusion, to **mutual inclusion**, referring to a *reciprocal dynamic where housing providers, community organizations, and individuals all play a role in initiating and contributing to social outcomes.*

While this concept could apply to housing models for other populations that experience exclusion, in this Lab, we focus on co-creating environments and experiences that foster mutual inclusion between people with disabilities and others within their surrounding community.

mutual responsibility to engage, foster, and steward good community

through...

creating welcoming spaces that enables social interaction

and

contributing to programs and services that bring people together

[1]The term "reverse inclusion" currently exists as a framework for inclusion in education. Learn more by visiting: https://www.brighthubeducation.com/special-ed-inclusion-strategies/66812-what-is-reverse-inclusion-bringing-traditional-students-into-special-ed-classes/

Kishorit is a community in Israel that is home to people with various disabilities. It is a supportive community that provides a continuum of residential, social, and vocational services for residents. It operates many businesses on site that are open to the public, including a therapeutic riding stable, which employs residents and other staff.

Opportunities for Inclusive Housing

This work is happening at an opportune time, where many agencies serving people with developmental disabilities and medical complexities are looking towards or in the process of creating new, affordable housing for the people they serve. The **Intentional Community Consortium** (ICC), a collective of agencies building affordable housing for those with developmental disabilities, is working to pilot innovative, mixed-use housing projects to be scaled across the country, as a result of the targeted investment in housing for people with developmental disabilities in the National Housing Strategy.

Therefore, the solutions around new inclusive housing options that emerge from this Lab may directly influence *what* and *how* these organizations build. Through consistent engagement with members of the ICC throughout the Lab, we hoped to develop new frameworks, processes and tools that would help shape the advancement of innovative, desirable, and inclusive housing for the people they serve.

What is the ICC?

The Intentional Community Consortium (ICC) is comprised of organizations, based primarily in Ontario, that build affordable housing for those with developmental disabilities. Most of the members of the ICC provide housing through buildings that they own or lease. The aim of the group is to advance the creation of intentional, mixed-use housing projects for people with developmental disabilities in Ontario and beyond.

ICC Members' Development Aspirations

- 82% — Yes, we are actively working towards developing or gaining access to more housing.
- 9% — Yes, we aspire to either develop or gain access to more housing but have not taken action yet.
- 9% — Other (please describe)

System-Level Trends

- There is more widespread interest in alternative housing models, including home-sharing and cohousing

- There is more emphasis on personalized housing solutions, not "one-size-fits-all"

- The COVID-19 pandemic has brought more focus to the link between housing and health

- New housing partnerships are emerging between non-profits, the private sector, and governments

- There is interest in radically mixed-use building forms, but the economics of development can present barriers to innovation

- Policy-makers are paying more attention to the issue of NIMBY-ism and exclusionary practices

- The National Housing Strategy has targeted funding to invest in housing for people with developmental disabilities

2 | *Methodology*

A Collaborative Approach

Bringing the System Together

The complexity of the problem being addressed in this Lab required bringing together a wide range of stakeholders, including system-level experts, developers, housing providers, and community stakeholders. The Lab also focused on bringing the voices of lived experts to the forefront, engaging with a diverse group of people living with developmental disabilities and medical complexities, as well as their family members and supporters.
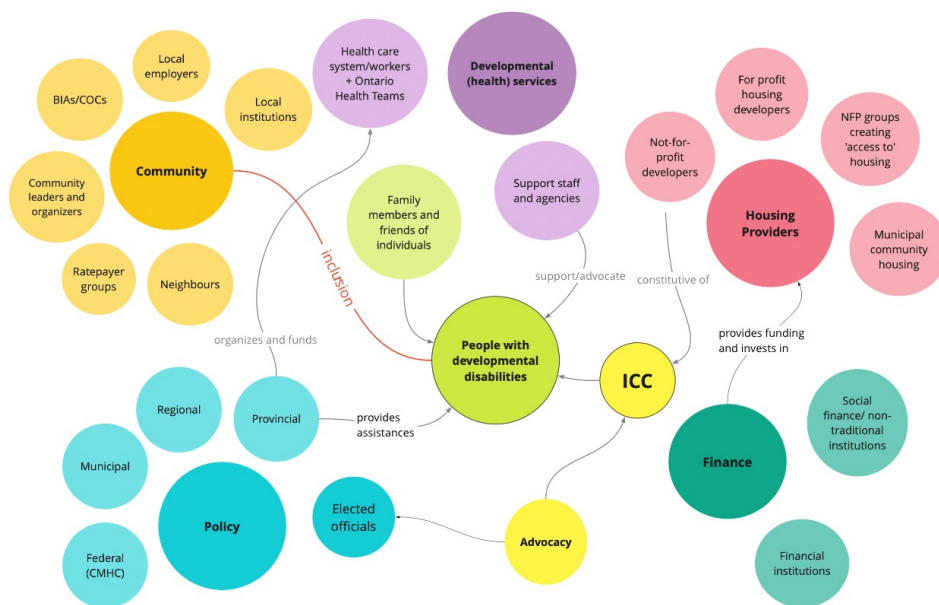
This image demonstrates the stakeholder mapping process undertaken to identify the key stakeholders relevant to this Lab, the connections between them, and their roles in the system.

Lab Team

The **Lab Team** undertook the day-to-day work of the Lab and was responsible for the creation of all deliverables and materials. The team was led by Reena, in partnership with Safehaven and SHS Consulting.

Lab Advisors

The **Lab Advisors** (listed on page 2 of this document) provided strategic advice and subject matter expertise over the course of the Lab. They participated in meetings with the Lab Team and provided feedback on Lab outputs.

Lab Participants

A diverse group of participants were engaged in various research activities and co-design workshops throughout the Lab. These included:

• Individuals with developmental disabilities and medical complexities, as well as their family members and support staff
• Subject matter experts, including innovative housing providers and developers; experts in the health, policy, and design fields
• Member organizations of the Intentional Community Consortium (ICC), comprised of housing and support service providers
• Community stakeholders, including representatives of community organization and neighbours to existing residences for people with developmental disabilities and medical complexities

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Lab Process

The following snapshot provides a high-level overview of the Lab process. The next four pages (9-13) include further details on each phase's activities and outputs.

MAR - SEP 2021	OCT - DEC 2021	JAN - FEB 2022	MAR - JUN 2022
Discovery	**Development**	**Prototype**	**Roadmap**
This phase was about understanding **the current system, stakeholder experiences, and opportunities for change to frame the direction of the Lab.**	This phase was about generating ideas of **what future housing options that foster mutual inclusion could look like.**	This phase was about prototyping **how to intentionally undertake development projects in a way that creates opportunities for mutual inclusion.**	This phase was about mapping **how to implement and scale these approaches by enabling housing providers.**

Discovery Phase

The Discovery Phase focused on researching the current system and understanding the experiences of key stakeholders, particularly people with developmental disabilities and medical complexities (living in independent housing and with family), organizations serving individuals, and community stakeholders in neighbourhoods with existing housing for people with developmental disabilities. This phase included several engagement activities, which were adapted to take place remotely.

The information collected was synthesized into a set of success criteria for each stakeholder around what their desired future would look like. The synthesis of these stakeholder perspectives led to the framing of **mutual inclusion**. In addition, the Discovery Phase captured barriers and opportunities to be explored in the next phases of the Lab.

The above images are taken from the workbook distributed to lived experts to fill out at home.

Discovery Phase Inputs

- Kick-off meeting with the **advisory committee**
- Interviews with **subject-matter-experts (8)**
- Survey shared with **member organizations of the ICC**
- Interviews with **lived experts (10)** + take-home workbooks
- Survey shared with **community stakeholders (neighbours, employers)**

Discovery Phase Outputs

Discovery Phase Summary Report

- Success criteria for individuals with developmental disabilities and medical complexities, organizations serving people, and community stakeholders
- Framing of mutual inclusion and solution directions

Development Phase

Building on findings from the Discovery Phase, the Development Phase dove deeper into opportunities to design for mutual inclusion in housing. While the Discovery engagements involved engaging with different stakeholder groups separately to understand their unique experiences, the Development Workshop invited various stakeholders to participate and collaborate.

The main objective of the Development Workshop was to generate ideas of what new housing options that embody mutual inclusion could involve or look like. Participants were divided into smaller groups and given prompts to guide their idea generation process.
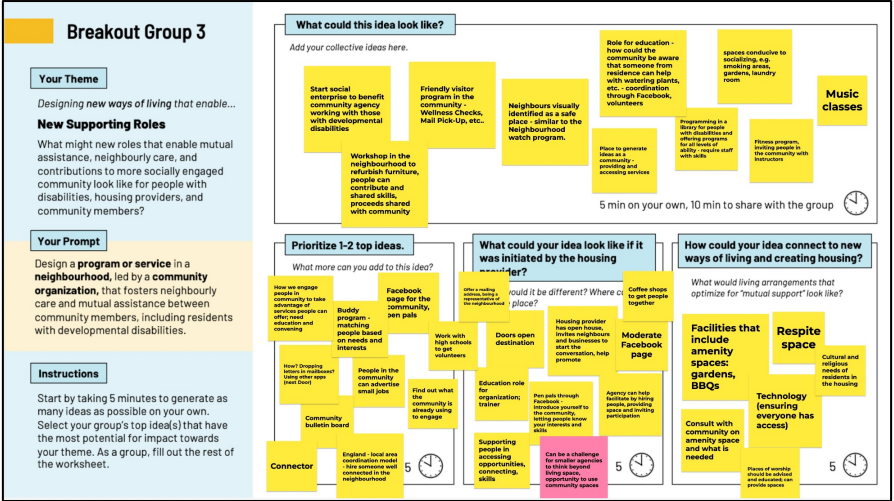
The above image shows a filled out canvas from the Development Workshop.

Development Phase Inputs

Development Workshop with **mixed stakeholders** (including members of Advisory Committee) to explore ideas for mutual inclusion

18 participants representing organizations serving people with developmental disabilities, family members of individuals, and community representatives

Development Phase Outputs

- Framing of different pathways to mutual inclusion
- Ideas of what design elements could foster mutual inclusion in housing
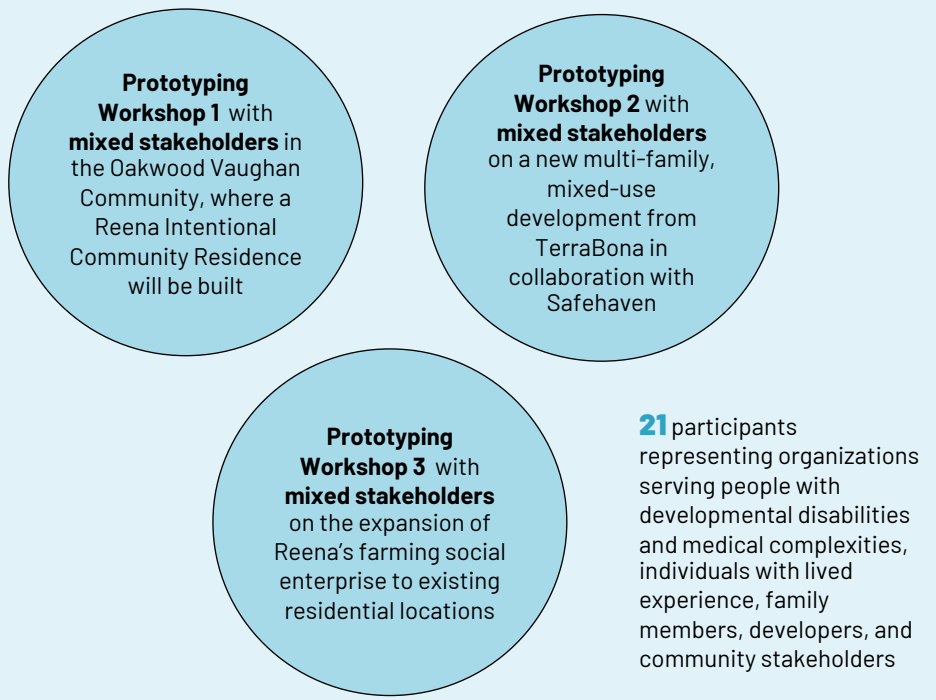
Prototyping Phase

The Prototyping Phase focused on how mutual inclusion can be infused into the process of developing new housing and incorporated into existing housing and communities.

To explore what these processes and supporting tools could look like, the Lab Team chose three real sites at various stages of development to act as test scenarios. At each Prototyping Workshop, a unique set of place-based stakeholders representing critical perspectives were invited to participate in a hypothetical design workshop to co-create spaces and programs to foster mutual inclusion. From these sessions, we learned more about the barriers, enablers, and opportunities to apply mutual inclusion into housing projects in the real world.
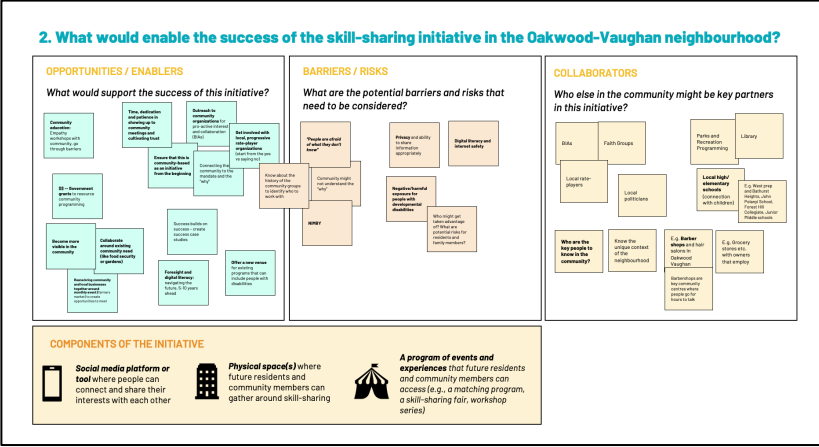
The above image shows a filled out canvas from one of the Prototyping Workshops.

Prototype Phase Inputs

Prototyping Workshop 1 with **mixed stakeholders** in the Oakwood Vaughan Community, where a Reena Intentional Community Residence will be built

Prototyping Workshop 2 with **mixed stakeholders** on a new multi-family, mixed-use development from TerraBona in collaboration with Safehaven

Prototyping Workshop 3 with **mixed stakeholders** on the expansion of Reena's farming social enterprise to existing residential locations

21 participants representing organizations serving people with developmental disabilities and medical complexities, individuals with lived experience, family members, developers, and community stakeholders

Prototype Phase Outputs

- Prototypes of processes and tools to engage stakeholders in co-designing for mutual inclusion
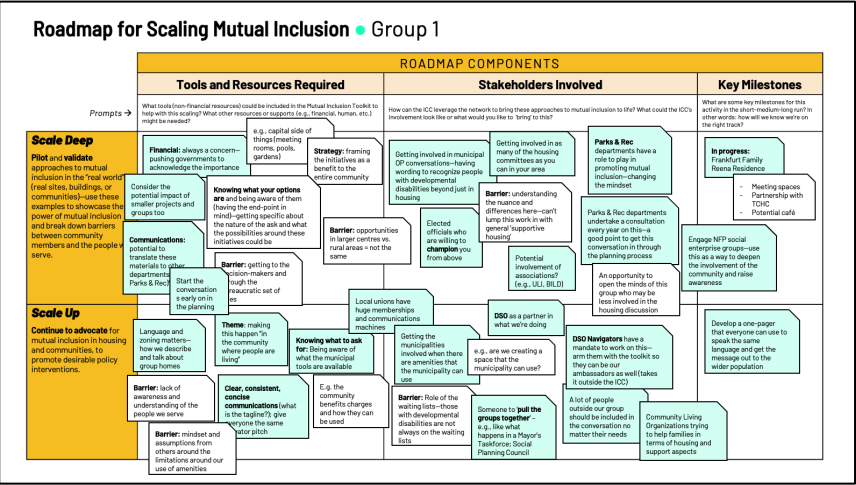
Roadmap Phase

The final phase of the Lab involved creating the culminating deliverables that would help organizations undertake mutual inclusion projects through new housing and community development initiatives for people with developmental disabilities and medical complexities.

This phase involved meeting with members of the ICC to validate the direction of the content and tools that would be created to support organizations interested in applying mutual inclusion. In addition, ICC members helped co-create the roadmaps for how the consortium could become the anchor body for the continuation and stewardship of this work. The ideas generated from this workshop helped shape the roadmap section of this report (Part 4).

The above image shows a filled out canvas from the Roadmap Workshop.

Roadmap Phase Inputs

Roadmap Workshop with the **ICC** (including members of Advisory Committee) to co-create the roadmaps for implementation

7 ICC member organizations represented

Final Lab Outputs

Roadmap Report

- Roadmaps for continuing and scaling the work on Mutual Inclusion beyond the Lab

Mutual Inclusion Field Guide

- A resource to help organizations integrate mutual inclusion into their new and existing developments

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3 | *Mutual Inclusion Field Guide*

Created by the
Housing for Mutual Inclusion Solutions Lab

The Mutual Inclusion Field Guide

Creating housing that fosters connections
for people with developmental disabilities and
medical complexities

Created by the
Housing for Mutual Inclusion Solutions Lab
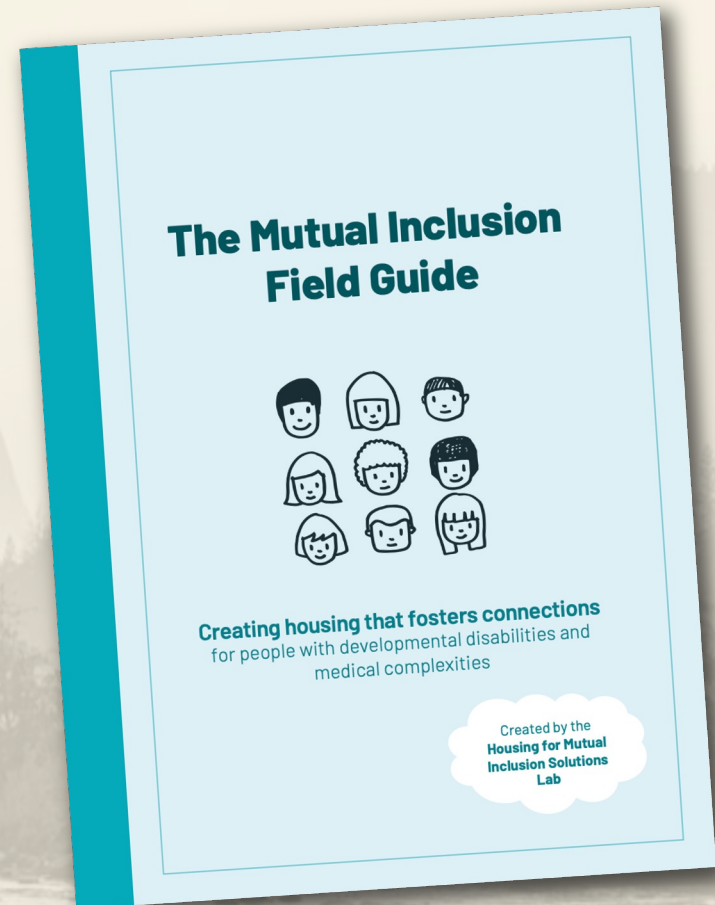
Mutual Inclusion Field Guide

The Lab process resulted in the co-development of **mutual inclusion** as a new approach and framework for building inclusive communities. With the participation of diverse stakeholders, the Lab generated principles, processes, and pathways that would foster the desired housing outcomes. As a key output of this project, the ***Mutual Inclusion Field Guide*** was created, capturing the ideas and knowledge collected throughout this year-and-a-half-long process.

The ***Field Guide*** is a practical resource to help interested groups infuse principles of mutual inclusion into their projects, providing a roadmap for housing innovation. While one of the key intended audiences for the guide includes **organizations serving people with developmental disabilities and medical complexities that currently offer or plan to provide housing**, this resource can also be used by all types of housing developers, community-builders, neighbourhood groups, and other stakeholders to learn how to initiate place-based projects that foster inclusion and belonging.

Through this Field Guide, we hope to inspire more intentional and diverse housing developments that enable individuals with developmental disabilities and medical complexities to build relationships, access new opportunities, and thrive in their communities.

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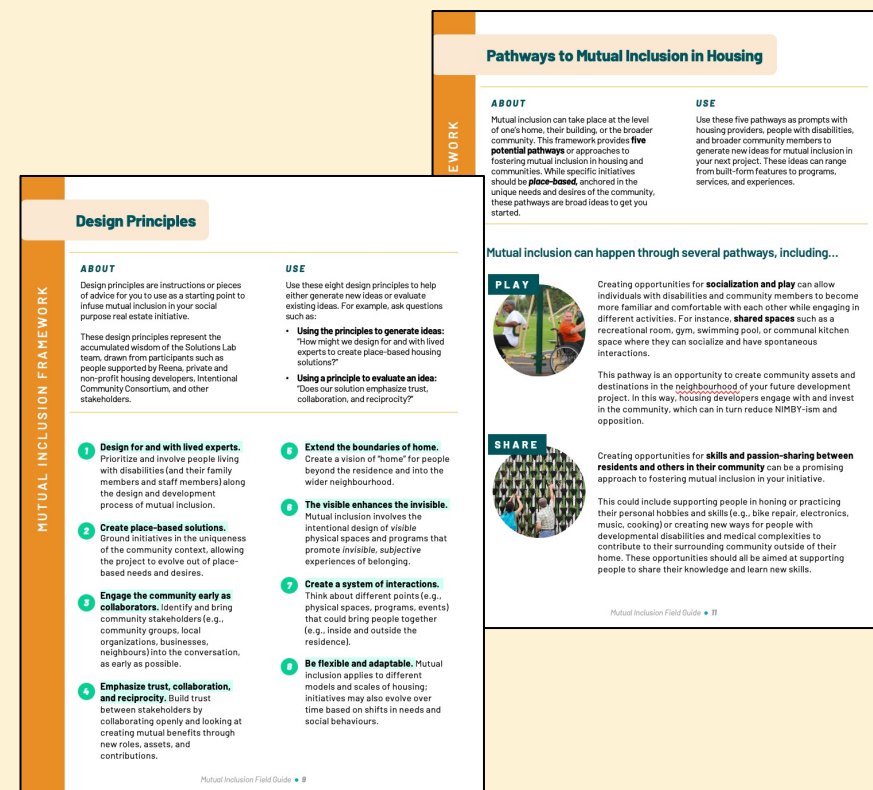
The Field Guide includes the following sections:

Part 1: Introduction to the Field Guide

This section contains an overview of the purpose of the guide, who it's for, and how it was created.

Part 2: What is Mutual Inclusion?

This section contains the framework for mutual inclusion, consisting of the definition, principles, desired outcomes, and pathways developed over the course of the Lab.

Part 3: Designing for Mutual Inclusion

This section contains detailed information on how to infuse mutual inclusion into existing and new housing developments. It includes a step-by-step process with practical information and tangible tools to help readers orient their projects.
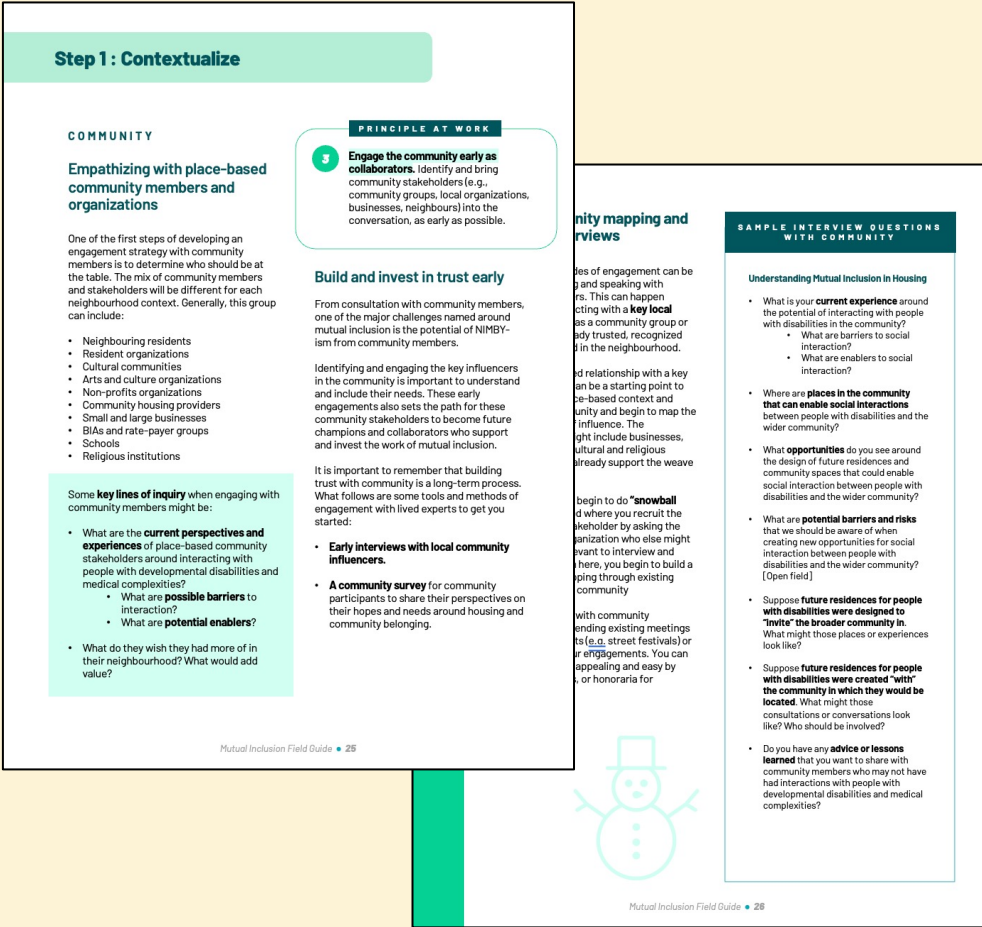
Future Work

The first iteration of the *Mutual Inclusion Field Guide* can be found in the Appendix of this report. We consider this document to be "version one" of this living resource–a compilation of the work developed in this Lab.

From here, there is much more to be done to test, validate, and expand on mutual inclusion as a collaborative approach to creating desirable new housing options for people with developmental disabilities and medical complexities.

Some components that could be added to this resource in the future include:

- More detailed tools (e.g., templates, checklists, etc.)
- Detailed case studies on successful mutual inclusion projects
- Tools and resources to replicate specific pathways (e.g., creating a community garden initiative)
- An evaluation framework for measuring success

Furthermore, the Field Guide could include a website and digital content (e.g., videos) to promote and disseminate resources for mutual inclusion.

The next section of this report contains a series of proposed roadmaps for the continuation and advancement of mutual inclusion in housing.
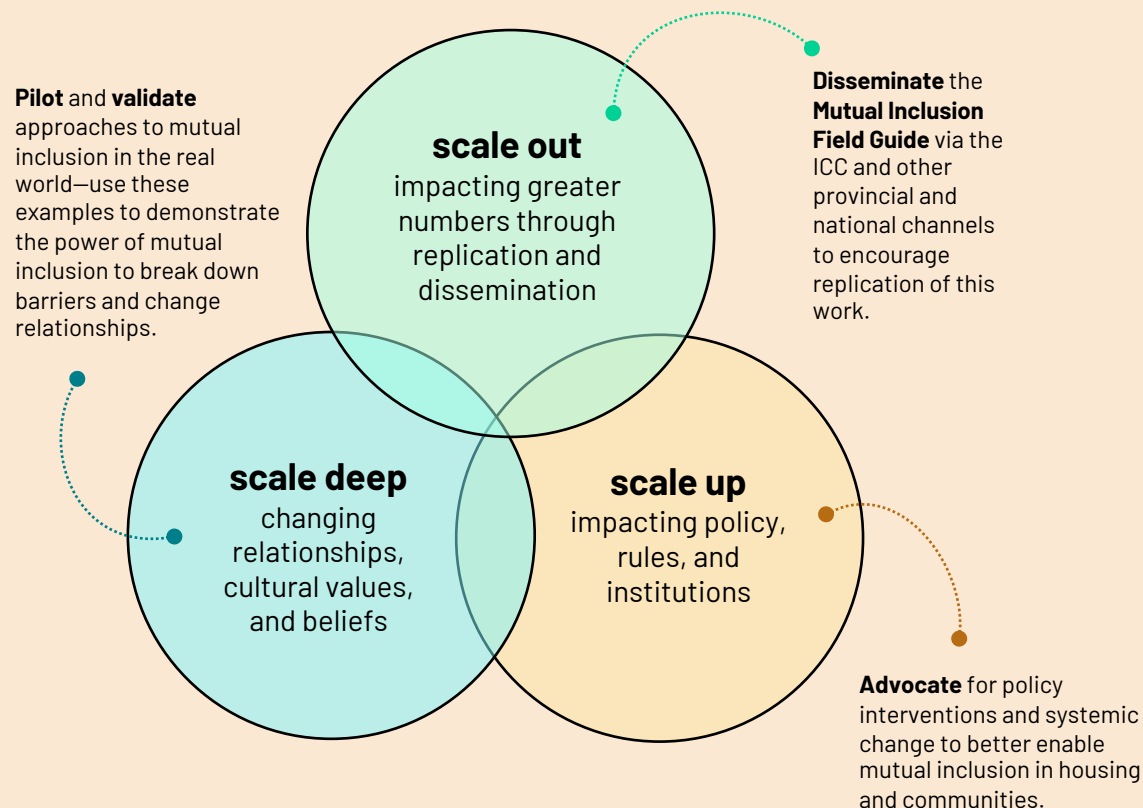
this is just the beginning...

4 | *Roadmap*

Scaling Mutual Inclusion

Beyond this Lab, we envision the work on mutual inclusion to scale in the following ways:

Pilot and **validate** approaches to mutual inclusion in the real world—use these examples to demonstrate the power of mutual inclusion to break down barriers and change relationships.

scale out
impacting greater numbers through replication and dissemination

Disseminate the **Mutual Inclusion Field Guide** via the ICC and other provincial and national channels to encourage replication of this work.

scale deep
changing relationships, cultural values, and beliefs

scale up
impacting policy, rules, and institutions

Advocate for policy interventions and systemic change to better enable mutual inclusion in housing and communities.

Riddell, D. and Moore, M-L. 2015. Scaling out, scaling up and scaling deep for social innovation. McConnell Foundation.

To start a "mutual inclusion movement," all three forms of scaling are required to ensure validation, growth, and success. We hope these efforts will result in more inclusive, creative housing options for people with developmental disabilities and medical complexities. These three scaling streams intersect and complement each other, as shown in the strategic milestones within the roadmaps in the following pages. These roadmaps aim to support the **advancement of mutual inclusion** across Canada.

Conversations with the Intentional Community Consortium (ICC)[1] signal early interest from the collective to lead the advancement of this work and take on critical roles within roadmap activities. Provided they have the resources, the ICC sees mutual inclusion as an opportunity for the community of practice to unite on housing principles and foster an environment of sharing, learning, and innovating among its members.

The following pages contain detailed roadmaps on the three proposed types of scaling to advance this solution.

[1]The Intentional Community Consortium (ICC) is in the process of incorporating and expanding its reach across Canada.

Scaling Out

This roadmap focuses on activities aimed at broadly **disseminating** resources on mutual inclusion (i.e., the *Mutual Inclusion Field Guide*) via the ICC and other provincial and national channels to encourage the uptake of this work and grow the community of practice around mutual inclusion.

	Short-Run (1 to 12 months)	Medium-Run (12 to 18 months)	Long-Run (18+ months)
Key Milestones	Launch the first edition of the Mutual Inclusion Field Guide / Host launch event	Present at a conference / Create an impact report (e.g., dissemination results, feedback)	Update and expand the Mutual Inclusion Field Guide

Key Actors and Roles	• Establish a **core team within the ICC** that leads the maintenance, marketing, and distribution of the *Mutual Inclusion Field Guide*
	   o Establish clear roles and responsibilities
	   o Onboard and train team members on mutual inclusion
	 • Identify and engage with **partners** (DS sector, housing development, etc.) across Canada as ambassadors and channels for dissemination
	 • Engage with **media organizations**
		• Continue to engage **partners** to endorse and help disseminate the Field Guide
		 • Engage and collect feedback from **organizations** that have reviewed or used the Field Guide
		 • Engage and collect feedback from **housing experts** (e.g., developers, builders, architects, planners, etc.)
			• Establish a **team** to update and expand the Field Guide (add tools, case studies, etc.) and a **review panel**
			   • Collaborate with **organizations and housing experts** to co-create the next iteration plus additional materials
			   • Infuse learnings from the pilot studies
			   • Identify opportunities to further expand work on mutual inclusion

Resources Required	• Secure **funding** for staff and dissemination activities
	   o Identify funding sources and opportunities
	 • Bring on human resources capabilities in communications, marketing, graphic design, web design, copywriting, etc.
		• Disseminate the Field Guide via dissemination channels
		 • Create additional marketing materials
		 • Create methods for gathering feedback (e.g., survey)
			• Identify and apply for **funding** for further development and promotion of the Mutual Inclusion Field Guide
			   o Determine a long-term operating budget for the maintenance and marketing of the guide

Communication and Marketing	• Create a targeted **communication and dissemination strategy** (e.g., press releases, webinars, conferences, social media, etc.)
	   o Create a key messages document
	   o Update the ICC website to include a section on mutual inclusion
	   o Plan a launch event (in-person and/or virtual)
	   o Apply to present at conferences
	 • Create a logo and **branding** guide
		• Conduct communication and dissemination activities to promote the Field Guide
		 • Host presentations and workshops for the target audience of the Field Guide
			• Create a long-term **communication and dissemination strategy**

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Scaling Deep

This roadmap focuses on activities to **pilot** and **validate** approaches to mutual inclusion in the real world, using resources developed in this Lab. These activities will contribute to further research and development of mutual inclusion as a housing approach, while demonstrating the power of mutual inclusion to break down barriers and change relationships.

	Short-Run (1 to 12 months)	**Medium-Run (12 to 18 months)**	**Long-Run (18+ months)**
Key Milestones	Confirm projects (minimum 3) to formally take part in the pilot study	Projects implement co-design process to integrate mutual inclusion in housing	Create case study report of pilot projects, including lessons learned and tools for replication Create a program to promote and incentivize mutual inclusion in housing (.e.g., annual awards)

Key Actors and Roles	• Establish a **core team within the ICC** that administers and oversees the pilot study
	• Partner with **academic institutions** to assist with the pilot study
	• Recruit **organizations creating or operating housing for people with developmental disabilities and medical complexities** that are interested in being part of the pilot (starting with ICC organizations, but potential to expand scope)
	  o Determine selection criteria (e.g., different building scales, geographies, phases of development)
	  o Select organizations
	  o Host training and orientation for participating organizations
		• **[Pilot organizations]** engage with **place-based partners** (e.g., ratepayer organizations, community groups, local government staff and politicians, etc.) and **housing experts** to co-create and implement pathways to mutual inclusion
		• **[Pilot study team]** checks in with organizations, offers guidance, and documents process
			• **[Pilot study team]** creates case study report of pilot findings and learnings
			  o Conduct photography and videography
			• **[Pilot organizations]** share learnings on the process of creating housing for mutual inclusion with others
			  o Share learnings through various forums (e.g., ICC meetings, workshops, presentations)
			  o Contribute to further development of the Mutual Inclusion Field Guide
			  o Use to inform advocacy activity

Resources Required	• Apply Mutual Inclusion Field Guide and supporting materials
	• Secure **funding and grants** for further research, evaluation, and demonstration of mutual inclusion
	  o Identify funding sources and opportunities
	• Create an **evaluation framework** for measuring success
	• Create a **terms of reference** for participating organizations that lists the timeline, expectations, touchpoints, etc.
		• Secure **funding and grants** for implementation of pilot projects
		  o Identify funding sources and opportunities
		• Bring on human resources capabilities in fundraising, grant writing, community engagement, housing design and development, etc. to support organizations along the process
			• Bring on human resources capabilities in graphic design, copy writing, visual media, etc.
			• Establish a **platform** where groups can connect and share learnings on mutual inclusion (e.g., website, newsletter, meeting series, working group, conference)

Scaling Up

This roadmap focuses on **advocacy** efforts for policy interventions and change to better support and enable mutual inclusion in housing and communities.
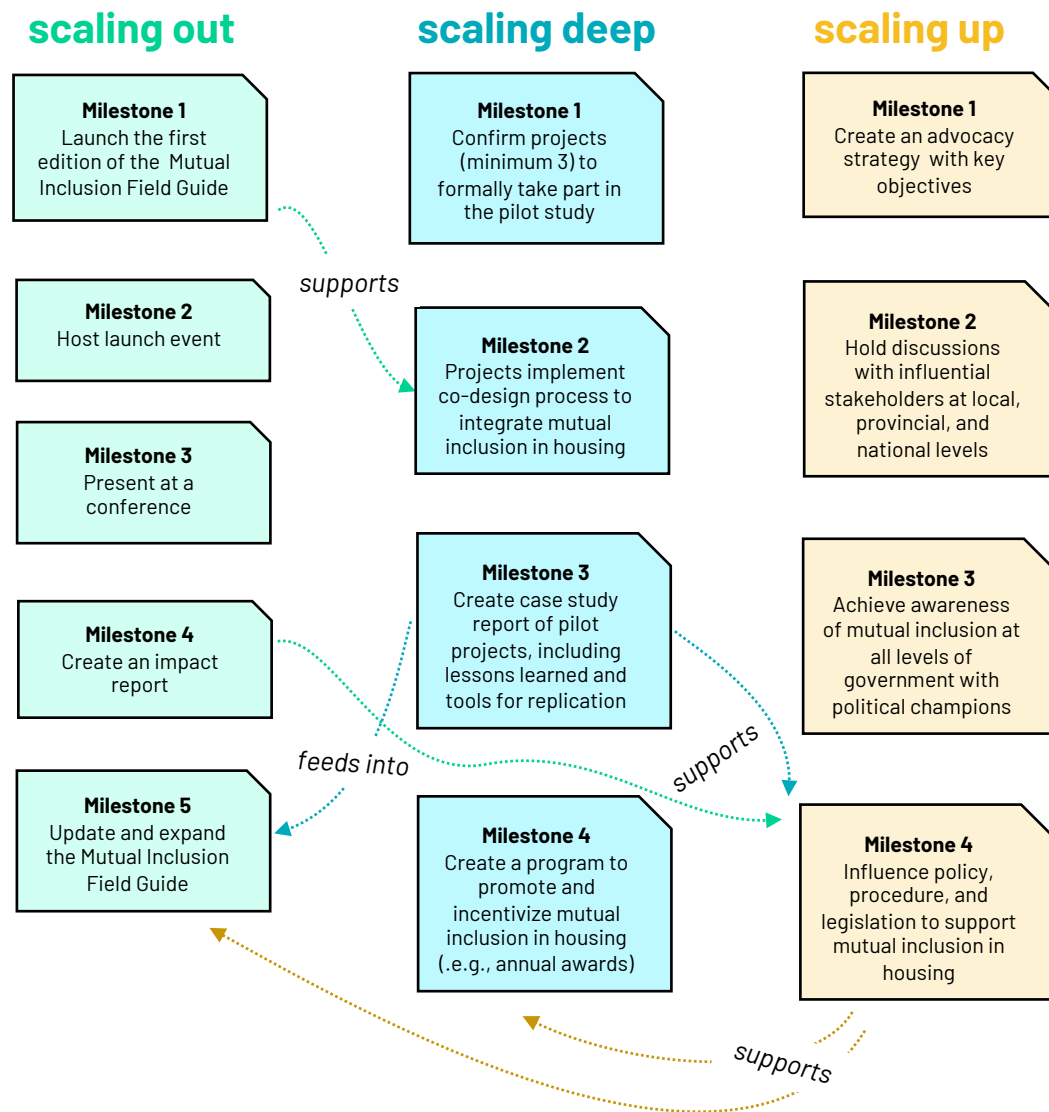
	Short-Run (1 to 12 months)	Medium-Run (12 to 18 months)	Long-Run (18+ months)
Key Milestones	**Create an advocacy strategy with key objectives**	**Hold discussions with influential stakeholders (government, development) at local, provincial, and national levels**	**Achieve awareness of mutual inclusion at all levels of government with political champions** **Influence policy, procedure, and legislation to support mutual inclusion in housing**

Key Actors and Roles	• Establish a **core team within the ICC** that spearheads advocacy and education around mutual inclusion
	  ○ Set scope and objectives
	  ○ Recruit advocacy team (e.g., organization staff, self-advocates, community members)
	• Ally with existing **advocacy groups** and efforts
	• Build strategic relationships and host initial conversations with **key stakeholders** (e.g., government, politicians, development industry, etc.)
		• Engage with **strategic stakeholders** to generate support around mutual inclusion in housing
		  ○ Host targeted meetings and discussions
		  ○ Host broader town halls, workshops, etc.
		  ○ Conduct educational campaign and dissemination of key messages
			• Engage with **decision-makers** around strategic asks to advance mutual inclusion (e.g., new funding streams, land allocation, policies, etc.)
			  ○ Focus on advocacy at local, provincial, and federal levels of government
			• Partner with **key stakeholders** on new housing and community initiatives for mutual inclusion
			• Establish **committees** of diverse stakeholders to help advocate and champion mutual inclusion
			• Continue ongoing stakeholder engagement

Resources Required	• Secure **funding** (public or philanthropic) for advocacy activities ○ Identify funding sources and opportunities • Create a list of stakeholders and an engagement strategy • Create a **pitch document** with key messages • Bring on human resources capabilities in advocacy, communications, marketing, research, etc.	• Conduct advocacy work through volunteered and paid time • Establish communication channels and secure spaces and forums to hold conversations	• Utilize impact reports and case studies to demonstrate the potential of mutual inclusion
Research	• Conduct further research on policy barriers and levers to applying mutual inclusion	• Identify opportunities for concrete interventions to support mutual inclusion and increased understanding of individuals with developmental disabilities and medical complexities.	• Conduct further research to support strategic asks

Overview of Key Milestones

This visual diagram shows an overview of the key milestones for the three roadmaps, and how they intersect and work together to advance mutual inclusion as an approach to creating housing for people with developmental disabilities and medical complexities.

In addition, each of the streams is positioned to address barriers to implementing mutual inclusion on a wide scale.

- **Scaling out** enables groups to develop and build capacity in designing for mutual inclusion via the *Mutual Inclusion Field Guide* and other resources. The aim is to make it more *feasible* for groups to integrate mutual inclusion into housing projects in the future.

- **Scaling deep** will help demonstrate the validity of mutual inclusion and contribute to further research on its impact. The pilot study's results may also help address barriers to getting community support by showing how it benefits neighbourhoods. The aim is to make mutual inclusion more *desirable* to broader stakeholders and generate public support.

- **Scaling up** can help relieve barriers around implementing ideas designed to foster mutual inclusion in housing, such as lack of funding and policy roadblocks. The aim is to make it more *viable* for groups to incorporate mutual inclusion into the future development of housing and communities.

scaling out

Milestone 1
Launch the first edition of the Mutual Inclusion Field Guide

Milestone 2
Host launch event

Milestone 3
Present at a conference

Milestone 4
Create an impact report

Milestone 5
Update and expand the Mutual Inclusion Field Guide

scaling deep

Milestone 1
Confirm projects (minimum 3) to formally take part in the pilot study

Milestone 2
Projects implement co-design process to integrate mutual inclusion in housing

Milestone 3
Create case study report of pilot projects, including lessons learned and tools for replication

Milestone 4
Create a program to promote and incentivize mutual inclusion in housing (.e.g., annual awards)

scaling up

Milestone 1
Create an advocacy strategy with key objectives

Milestone 2
Hold discussions with influential stakeholders at local, provincial, and national levels

Milestone 3
Achieve awareness of mutual inclusion at all levels of government with political champions

Milestone 4
Influence policy, procedure, and legislation to support mutual inclusion in housing

supports

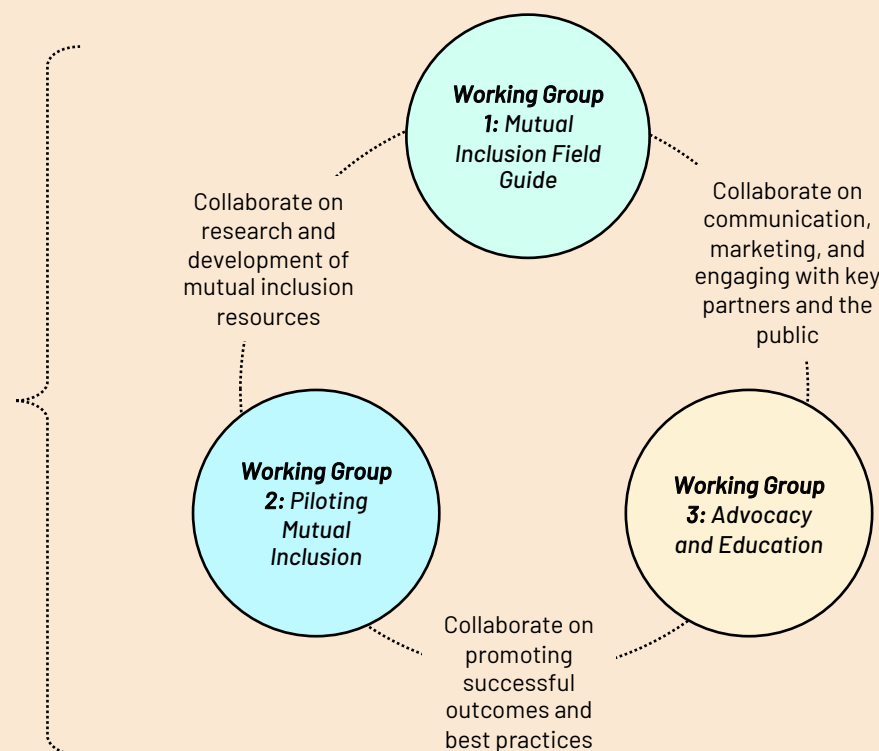*feeds into*

supports

supports

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Igniting the Power of the ICC

The activities described in the three roadmaps require significant **financial** and **human resources**. The visual on this page shows how the Intentional Community Consortium, acting as the lead network in the advancement of mutual inclusion, could be organized to take on the different scaling activities proposed for the next phase of work.
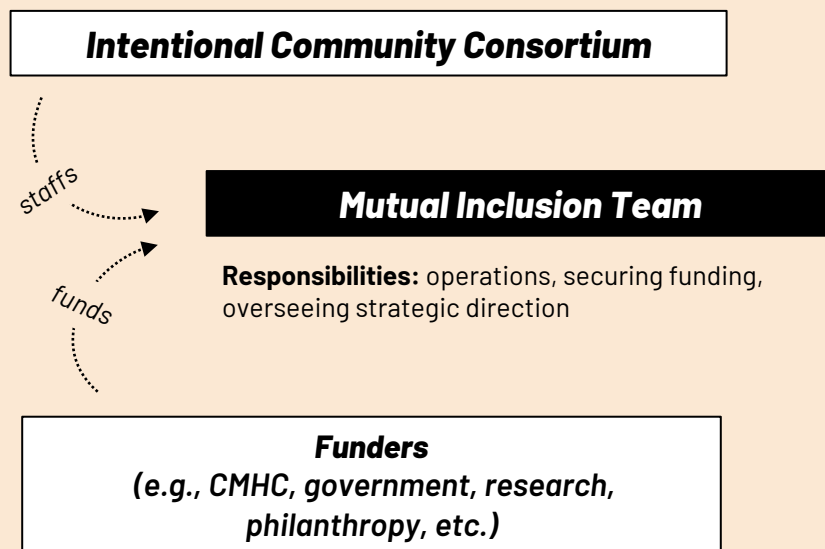
As awareness of mutual inclusion grows and the movement gains traction within Canada and beyond, the core team overseeing and managing this work may expand beyond the Intentional Community Consortium to include other groups and networks.

Intentional Community Consortium

staffs

funds

Mutual Inclusion Team

Responsibilities: operations, securing funding, overseeing strategic direction

Funders
(e.g., CMHC, government, research, philanthropy, etc.)

Working Group 1: *Mutual Inclusion Field Guide*

Working Group 2: *Piloting Mutual Inclusion*

Working Group 3: *Advocacy and Education*

Collaborate on research and development of mutual inclusion resources

Collaborate on communication, marketing, and engaging with key partners and the public

Collaborate on promoting successful outcomes and best practices

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5 | *Conclusion*

Desired Impact

The goal of the Lab was to develop a new approach to creating housing based on the concept of **mutual inclusion** through collaboration between agencies, developers, and place-based stakeholders to intentionally create structures that lead to new interactions, relationships, and ultimately a sense of communal belonging.

By applying the principles and process of mutual inclusion to housing, we see the potential for new, diverse developments that offer individuals with developmental disabilities and medical complexities the kind of life they dream of, while creating social benefits for the whole community.

In addition, we see the potential for this concept to impact the overall housing system. These three imagined scenarios illustrate a hypothetical future in which mutual inclusion in housing leads to more profound societal change.

A world where... ***neighbours are excited to welcome housing designed to foster mutual inclusion in their community***

Instead of opposing new housing developments, particularly ones that serve vulnerable populations, what if communities supported and even sought new developments that would bring **valuable social infrastructure** to their community through designing for mutual inclusion?

A world where... ***developers are keen to incorporate mutual inclusion into every real estate project***

What if developers sought out partnerships with organizations that have expertise in designing for mutual inclusion to create the type of innovative, socially-minded **mixed buildings** that communities demand?

A world where... ***mutual inclusion is adopted as a design standard***

What if mutual inclusion expanded to all kinds of developments and was integrated into policy and standards, opening the door for a more **human-centred** way of thinking about real estate, focused on social outcomes like inclusion and belonging?

Process Reflections

Over the course of this project, the Lab Team has gathered several key learnings:

The importance of taking the time to understand and hear from lived experts

- Particularly in the initial phases of the Lab, we devoted time to meaningfully engaging with people who have developmental disabilities and medical complexities. This involved creating different tools (e.g., a booklet, virtual interview guide), consulting with experts, and ensuring that people have the support they need to participate in conversations. While these engagements took a lot of time to plan and execute, the learnings were pivotal for ensuring that the Lab's work would be centred around real needs, desires, and experiences.

The power of language and frameworks

- Although many aspects of mutual inclusion build on existing concepts and ideas, creating a shared language and framing around this approach can help achieve alignment. The language used in this Lab evolved based on what resonated with diverse stakeholders.

The excitement around the prospect of mutual inclusion in housing

- We received a lot of positive encouragement from various stakeholder groups throughout the project, from ICC organizations that see the opportunity for change and innovation to community stakeholders that are keen to get involved and contribute.

The power of collaboration

- Our workshops brought together diverse stakeholders, from agencies serving people with developmental disabilities and medical complexities to family members of individuals and community leaders. Through co-design exercises, these mixed participant groups took in new perspectives and generated creative ideas, drawing on each other's expertise.

What we would do differently

If the COVID-19 pandemic was not a factor in our engagement approach, our process could have involved the following:

- More in-depth engagement with lived experts through home visits and neighbourhood tours led by individuals

- More engagement with community stakeholders through on-site intercept interviews

- Site visits of best practices

- In-person prototyping workshops, with role-playing and tangible mock-ups of ideas

- Engagement with more ICC members, including an in-person retreat to build the roadmap

Summary

This Lab began with the intent to explore different housing options for people with developmental disabilities and medical complexities that would increase inclusion, reduce isolation, and improve lifelong wellbeing outcomes. More than just the four walls, we wanted to explore innovative approaches to housing that would foster a sense of home, community, and belonging for people.

By engaging with diverse stakeholders, including individuals, family members, housing and support providers, community representatives, and other experts, the concept of **mutual inclusion** approached as a promising path forward. From there, we continued to work with participants to envision what mutual inclusion could look like – the types of spaces and interactions that would foster our desired outcomes – and prototype how this new approach could be intentionally integrated into new and existing housing developments.

What makes the concept of mutual inclusion innovative is that it:

- Promotes **new roles, partnerships, and dynamics** for housing developers and providers, residents, and outside community members

- Highlights the strengths of individuals with developmental disabilities and medical complexities to make **meaningful contributions** to their communities

- Emphasizes **common goals, mutual benefits, and shared responsibilities**

- Pushes the boundaries of what housing could look like to consider **innovative uses** that enhance people's everyday experiences

Capturing the learnings from this Lab, we created the **Mutual Inclusion Field Guide** to help orient people to this concept, as well as enable groups to incorporate it into their work using the described principles and approaches. In addition, a series of **roadmaps** were outlined on how mutual inclusion could be further explored and scaled.
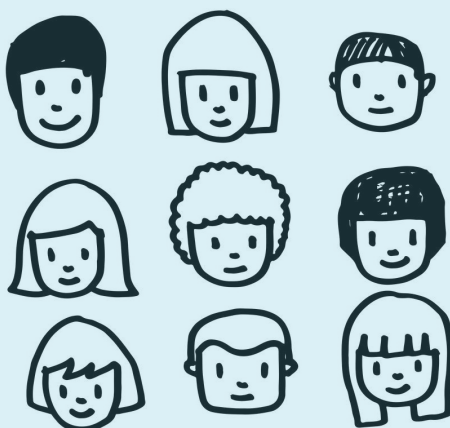
Creating housing for people with developmental disabilities and medical complexities that fosters deep social inclusion requires new kinds of collaborations, with players thinking outside the box and working together differently to create solutions that don't currently exist. With this work, we hope to inspire some of the change and creativity that is needed.

Appendix

6

The Mutual Inclusion Field Guide

The Mutual Inclusion Field Guide

Creating housing that fosters connections
for people with developmental disabilities and
medical complexities

Created by the
**Housing for Mutual
Inclusion Solutions
Lab**

Table of Contents

Acknowledgements

The Affordable Housing for Mutual Inclusion Solutions Lab was led by Reena in partnership with Safehaven and SHS Consulting.

The Lab Team

Reena

Fred Winegust, Stakeholder Relations

Gary Gladstone, Stakeholder Relations

Safehaven

Susan Bisaillon, Chief Executive Officer

Kathryn Burbridge, Manager – Quality, Safety and Strategic Directions

Allie Cotter, Policy and Development Lead

SHS Consulting

Christine Pacini, Partner

Adrienne Pacini, Principal, Strategic Design

Lanxi Dong, Senior Design Researcher

Cheryl Hsu, Senior Design Researcher

Advisory Committee

David Petkau, Christian Horizons

Brad Saunders, Community Living Toronto

Julia Hanigsberg, Holland Bloorview

Ann Bilodeau, KW Habilitation

Joshua Otis, UJA Federation of Greater Toronto

Sal Marrello, Sonderbloom

Henry Wall, Kenora District Services Board

Joe Barnes, Kenora Chiefs Advisory

Viji Hariharan, BATAY Reena

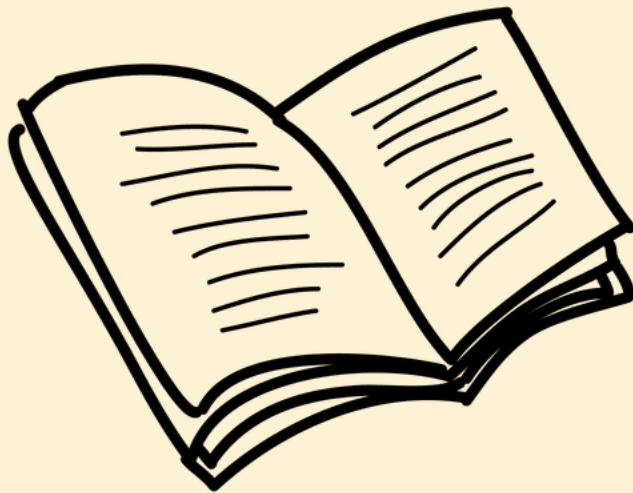**Job Rutgers,** OCAD University

Jennifer Koffman, Family representative

Dana Zosky, Family representative

Part 1:
Introduction to
the Field Guide

What is the Mutual Inclusion Field Guide and who is it for?

This Field Guide is a roadmap for innovators and changemakers looking to create new housing initiatives that foster empathy, community, and belonging. This resource is not for people looking to realize the "same old" types of development, but for those who want to push the boundaries on what mutual inclusion could look like in communities where people with developmental disabilities and/or medical complexities live.

This practical resource is meant to be a source of inspiration to help groups infuse the concept of **mutual inclusion** into their projects. The mutual inclusion principles outline ways for housing developers, community-builders, neighbourhood groups, support service agencies, and the people they serve to come together around housing and place-making projects. Through the mutual inclusion framework, shared spaces, collaborative programming, and other initiatives can be co-created for the benefit of all.

The Field Guide also offers steps and tools to enable the creation of community-based projects that build in opportunities for people with disabilities and others in the neighbourhood to meet and interact with one another. It introduces ways for community stakeholders and organizations supporting individuals to share responsibilities around fostering inclusion by initiating conversations, sharing ideas, and taking on new roles.

We hope the use of this guide results in more intentional and diverse housing that goes beyond fulfilling basic needs – enabling individuals with developmental disabilities and/or medical complexities to socialize and play, share and learn, nourish and grow, celebrate and live in ways they desire within communities.

NOTE

This Field Guide is just the beginning of exploring mutual inclusion as an approach to housing. The concept, principles, and processes may evolve over time through further research, piloting, and testing of ideas.

How was this Field Guide created?

The Mutual Inclusion Field Guide is a product of the National Housing Strategy Solutions Lab entitled "*Affordable Housing for Mutual Inclusion: Options for Individuals with Developmental Disabilities + Medical Complexities*", an 18-month collaborative initiative led by Reena in partnership with Safehaven and SHS Consulting.

A wide range of stakeholders and organizations participated in focus groups, workshops, meetings, interactive exercises, and interviews, which informed the content of the Field Guide. Participants included people supported by Reena and Safehaven, private and non-profit sector developers and housing providers, support service agencies, neighbourhood groups, and other community members in Toronto and York Region.

How can you use this Field Guide?

The Field Guide can be used at any phase of the real estate development process, whether you are in the early stages, conceiving of the vision for your project and undertaking feasibility studies, or working on an initiative that is further along into the pre-development and development phases. This resource can help you bring in new partners or collaborators and think differently about what your project can offer.

This guide can also be used to reimagine housing already in operation—it is never too late to infuse mutual inclusion into existing spaces to enhance community connection.

Whether you are involved in housing or simply interested in learning about the concept of mutual inclusion, we hope this guide leads to rich conversations about what the future of inclusive housing and communities could look like.

Part 2:
What is Mutual Inclusion?

Mutual Inclusion

A Collaborative, Socially-Minded Approach to Housing

Mutual inclusion in housing means thinking about how a real estate development, and the residents that live in it, relate to the wider community in which it's situated. It involves bringing together place-based stakeholders to intentionally create opportunities for people to meet, engage, and interact with each other, leading to mutual benefits over time.

OUR DEFINITION

Mutual inclusion refers to an **ongoing, reciprocal process** where housing providers, members of a community, and individuals all play a role in initiating connections and contributing to social outcomes.

What makes mutual inclusion *different* from traditional approaches to inclusion is the shift away from the mentality that support service agencies always need to take the initiative to ensure the people they serve are included in broader society. Instead, it proposes a more multi-directional approach to inclusion that involves shared efforts between housing developers, agencies, community groups, and individuals themselves to build and maintain connections.

Designing for Social Change

We see potential for mutual inclusion as a concept to have significant impact within the housing system by:

- Showing community stakeholders the value this kind of real estate development can bring to their community, leading to more support and participation, while reducing fears about change.

- Enticing more private and non-profit developers to create housing in this collaborative way, focusing on designing for inclusion and other desired experiences.

- Changing building standards to be more person- and community-centred, with governments supporting and prioritizing this type of development.

Design Principles

ABOUT

Design principles are instructions or pieces of advice to help you infuse mutual inclusion into your new or existing real estate initiative.

These starting design principles represent the accumulated wisdom of the Solutions Lab team, drawn from participants such as people supported by Reena and Safehaven, private and non-profit housing developers, members of Intentional Community Consortium, and other stakeholders.

USE

Use these eight design principles to help generate new ideas or evaluate existing ideas. For example, ask questions such as:

- **Using the principles to generate ideas:** "How might we design for and with lived experts to create place-based housing solutions?"

- **Using a principle to evaluate an idea:** "Did we prioritize the needs and desires of the people we serve in this solution?"

1. Design for and with lived experts. Prioritize and involve people living with developmental disabilities and/or medical complexities (with those who support them) along the process of designing for mutual inclusion.

2. Create place-based solutions. Ground initiatives in the uniqueness of the community context, allowing the project to evolve out of place-based needs and desires.

3. Engage the community early as collaborators. Identify and bring community stakeholders (e.g., community groups, local organizations, businesses, neighbours) into the conversation, as early as possible.

4. Emphasize trust, collaboration, and reciprocity. Build trust between stakeholders by collaborating openly and looking at creating mutual benefits through new roles, assets, and contributions.

5. Extend the boundaries of home. Create a vision of "home" for people that goes beyond the residence and into the wider neighbourhood.

6. The visible enhances the invisible. Mutual inclusion involves the intentional design of *visible* physical spaces and programs that promote *invisible*, subjective experiences of belonging.

7. Create a system of interactions. Think about including different points (e.g., physical spaces, programs, events) that could bring people together in intentional ways.

8. Be flexible and adaptable. Mutual inclusion applies to different models and scales of housing; initiatives may also evolve over time based on shifts in needs and behaviours (e.g., as people age).

Desired Outcomes

ABOUT

Desired outcomes help ground your mutual inclusion work in purpose and help make the goals for your initiative more concrete. Together with the design principles, desired outcomes reflect the interests, needs, and desires of the people you hope will benefit from mutual inclusion (e.g., residents and wider community members). These outcomes illustrate "why" what you're doing is important and what you are trying to achieve.

USE

Before generating new ideas for mutual inclusion, craft your desired outcomes with community members, organizations (e.g., housing providers, developers, and community organizations), and people with developmental disabilities and/or medical complexities .

See below for some of the key desired outcomes that we heard from stakeholders in the Lab. To learn more about how to host your own conversations about desired outcomes, see the "Contextualize" section of this Field Guide.

Community Members

Being included in consultations

Seeing that the developer is aware of and cares about the local community context

Collaborating on shared priorities and working towards common goals (e.g., providing affordable housing, bringing new services and programming to the neighbourhood)

Gaining new community "destinations" and social infrastructure

Increasing civic engagement

Welcoming people with disabilities into the community and understanding how to be allies

People with developmental disabilities and medical complexities

Having choices in where I live, how I live, what I do (for work and fun) and what my supports look like

Having freedom to go places and explore new things

Being able to set and meet my goals

Being able to meet and socialize with people spontaneously and through programmed activities

Feeling supported by friends and neighbours

Being able to contribute and participate in my community based on my strengths and interests

Organizations

Creating more housing suitable for the people we serve, who have diverse needs and desires

Collaborating on housing projects with likeminded partners

Engaging people we serve in the development of housing and services, as well as involving them in the delivery of programs

Fostering relationships with neighbours and being seen as an asset in the community

Having residents become ambassadors to the broader community, increasing advocacy and education about developmental disabilities and medical complexities

Pathways to Mutual Inclusion in Housing

ABOUT

Mutual inclusion can take place at the level of one's private home, building, or in the broader neighbourhood. This framework provides **five potential pathways** or approaches to fostering mutual inclusion in housing and communities. While specific initiatives should be *place-based,* anchored in the unique needs and desires of the community, these pathways are broad ideas to get you started.

USE

Use these five pathways as prompts to generate new ideas for mutual inclusion in your housing development or community. These ideas can range from physical spaces to programs, services, and experiences.

Please note that these are not the only potential pathways to fostering mutual inclusion, but they represent some of the key themes that stood out in our engagements.

Mutual inclusion can happen through several pathways, including...

PLAY

Creating opportunities for **socialization and play** can enable individuals with developmental disabilities and/or medical complexities and community members to become more familiar and comfortable with each other while engaging in different activities. For instance, shared spaces such as a recreational room, gym, swimming pool, community meeting space, or communal laundry facility, can lead to spontaneous meetings and interactions.

This pathway is also an opportunity to create new assets and destinations in the neighbourhood of your development project. In this way, housing developers engage with and invest in the community, which can in turn reduce NIMBY-ism and opposition.

SHARE

Creating opportunities for **skill- and passion-sharing** between residents and others in their community can be a promising approach to fostering mutual inclusion.

This could include connecting residents and other community members around common interests, hobbies, and skills (e.g., bike repair, electronics, music, cooking) or working with residents with developmental disabilities and/or medical complexities to find unique ways for them to contribute to their community. These opportunities should be aimed at supporting people to share their strengths and explore potential interests.

MUTUAL INCLUSION FRAMEWORK

NOURISH

Creating opportunities for residents and neighbours to **grow, share, cook, and eat food together** can be a powerful pathway to mutual inclusion.

Connecting housing to programs and services around food benefits both residents and the local community. This might include creating gardens and farms where community members and residents grow food together. The food that is grown can then be shared through events, restaurants, or farmers markets, with opportunities to establish social enterprises, as well as support local food security and resiliency.

CELEBRATE

Similar to the notion of connecting through food and nourishment, mutual inclusion can be achieved through designing new programs, initiatives, or housing models that encourage people to **celebrate and express their cultures and values**. This expression could include celebrating faith-based or cultural holidays together, sharing traditional meals, learning about each other's practices and traditions, and creating spaces for culturally-specific uses.

LIVE

All of the above pathways to mutual inclusion impact where and how we live. Naturally, the final pathway included in the guide is to imagine **innovative forms of housing and living arrangements** that bring residents and community members together. The location, housing form, integration of mixed-use spaces, and mix of residents can be intentionally designed to create opportunities for mutual inclusion, while catering to the particular needs of residents with developmental disabilities and/or medical complexities.

Having diverse housing options to choose from is important to meet the different needs and preferences of people with developmental disabilities and medical complexities. Developers who are not already considering housing design and suitability for people with developmental disabilities and/or medical complexities can use this pathway as a prompt to find ways to include housing for these individuals in their projects.

Part 3:
Designing for
Mutual Inclusion

Process Overview

This page provides an overview of the collaborative **process we propose to design for mutual inclusion**. This process includes three steps with specific tools to help introduce different approaches to designing with neighbourhood stakeholders and people with developmental disabilities and medical complexities.

STEP 1

Contextualize.

The first step of designing housing for mutual inclusion is to get to **know the context of the place** (the people, cultures and physical form).

Mutual inclusion intends to create a custom-fit (as opposed to a one-size-fits-all) housing intervention that is responsive to the community's unique stories and needs.

The types of activities you might undertake in this phase include:

- Hosting meetings to build relationships with local community groups
- Listening to and building empathy with people with developmental disabilities and medical complexities ("lived experts"), neighbours, and other community organizations
- Building success criteria with the community based on local needs and desires
- Setting a collective intention for mutual inclusion

STEP 2

Co-Design.

The spirit of co-design is to not simply design for, but **design with** people. You can invite lived experts and community members into a co-design process that impacts the **built form** of the building (e.g., a shared recreational space), as well as the creation of **programs** that bring community and residents together.

The co-design process is central to the concept of mutual inclusion. The types of activities you might undertake in this phase include:

- Ideation workshops to generate ideas for mutual inclusion at any stage of the housing development process
- Prioritization and refinement of ideas
- Prototype workshops to bring ideas to life and identify opportunities and barriers for implementation

STEP 3

Cultivate.

This final phase involves working together to **implement, evaluate, and iterate** upon your mutual inclusion initiative.

This step could involve launching a small-scale pilot or fully implementing a new housing development, program, service, or community initiative. Throughout the implementation process, lessons learned should be documented, contributing to the community of practice around mutual inclusion.

Mutual Inclusion in Housing Development

How can this process fit in to your housing development project?

Part of the effort to build this Mutual Inclusion Field Guide involved testing the principles, concepts, and tools with different groups and organizations at various stages of the housing development process.

Infusing mutual inclusion should ideally start at the beginning of a new housing or community development project (i.e., when you are in the initial visioning and feasibility phase). By applying these tools and approaches early on, you plant the seeds and build relationships with a diverse range of stakeholder groups who are more likely to be engaged in the work as it progresses.

When a development project is already underway, it can be more difficult to pivot to bring in the mindsets and diverse stakeholders needed for mutual inclusion. Yet, with a committed team and a spirit for innovation, the tools in this Field Guide can still be helpful for projects in the pre-development, development, or operation phases. What might change are the ways mutual inclusion can be integrated. For instance, it may be more challenging to add a new space for a specific activity; however, new programming, services, or building features could be incorporated into existing structures to foster mutual inclusion.

On the other hand, bringing mutual inclusion initiatives into housing that already exists may benefit from existing relationships between residents, the housing provider, and neighbours that can be leveraged to create innovation.

No matter where you are in the housing development process, there is opportunity to apply mutual inclusion.
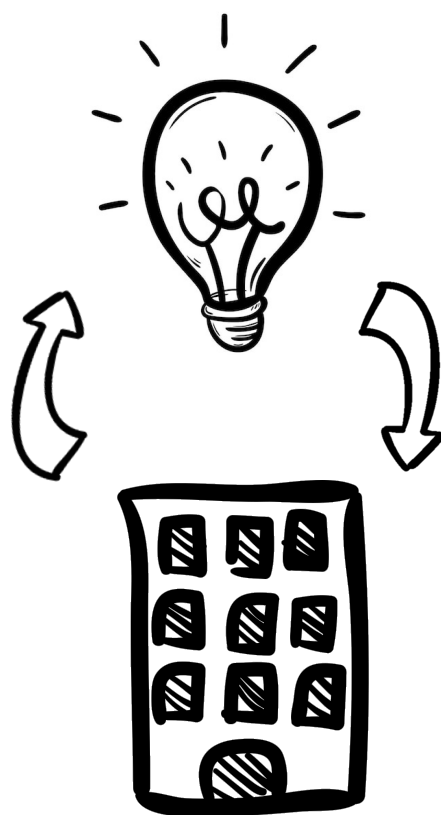
Sample Development Process

ABOUT

This page provides an overview of what it could look like to infuse mutual inclusion into each phase of the housing development process, beginning with feasibility.

USE

Use this sample development process to plan activities that could help integrate mutual inclusion into your housing project.

FEASIBILITY

Infusing Mutual Inclusion

In the feasibility phase, designing for mutual inclusion could include:

- Research on the community context
- Early community outreach and conversations with neighbourhood groups
- Engagement with people with lived experience to learn about their needs and bring them into a collaborative process

Barriers and Opportunities

During this phase, you may encounter barriers such as NIMBY-ism from the community, lack of awareness about your organization or project, or a sense of fear of the unknown.

Use this moment to build awareness about your project and start an ongoing conversation with the community to find your champions who will help get people excited about your initiative.

Potential Activities

The following activities could be considered as part of this phase:

- **Place-based research** such as a tour of the neighbourhood or taking stock of social, cultural, financial, and human assets in the community
- **Community engagement** activities such as visioning workshops, interviews, and discussions around desired outcomes

PRE-DEVELOPMENT

Infusing Mutual Inclusion

In the pre-development phase, designing for mutual inclusion could include:

- Co-designing with key stakeholders and community partners
- Imbedding considerations for mutual inclusion into the planning and pro formas
- Engaging the broader community for input
- Facilitating opportunities for existing community members and future residents to get to know each other

Barriers and Opportunities

During this phase, you may encounter barriers such as lack of alignment and knowledge gaps. In addition, the community may not yet see the value in participating.

To overcome these barriers, bring people together around common issues and desires. Communicate the value of contributing to place-making and the potential outcomes of this work. Continue to work on building relationships and trust.

Potential Activities

The following activities could be considered as part of this phase:

- **Co-design with key stakeholders** by creating a place-based "mutual inclusion team" comprised of staff, community representatives, and future residents with developmental disabilities and medical complexities
- **A workshop** that builds on **the pathways to mutual inclusion** to generate novel ways to foster mutual inclusion in the context of your project

MUTUAL INCLUSION TOOL

DEVELOPMENT

Infusing Mutual Inclusion

In the development phase, designing for mutual inclusion could include:

- Keeping the community engaged and updated on the development

Barriers and Opportunities

During this phase, some site-specific concerns might arise.

Leverage your relationships and the community support you fostered earlier in the process to stay true to your compelling story and vision for your project.

Potential Activities

The following activities could be considered as part of this phase:

- **Maintain open communication channels with the community** via newsletters, community postings, or events

OPERATION

Infusing Mutual Inclusion

In the operation phase, designing for mutual inclusion could include:
- Maintaining environments where community members and residents interact
- Running programs and events that intentionally bring community members and residents together

Barriers and Opportunities

During this phase, there may be concerns with sustainable funding and operations. Some stakeholders who originally participated in the process may no longer be involved and new stakeholders may need to be onboarded.

To continue the work, new roles such as a "Mutual Inclusion Steward" may need to be introduced to ensure maintenance and uptake of programming or initiatives.

Potential Activities

The following activities could be considered as part of this phase:

- **Initiate shared roles and responsibilities with community stakeholders,** like creating committees or groups that are responsible for running certain programs and maintaining spaces for continued use by residents and other community members

Step 1: Contextualize

Why are *context and place* important to mutual inclusion?

The first step in designing housing for mutual inclusion is to get to **know the context of the place** (the people, cultures and physical form).

Mutual inclusion intends to create a custom-fit (as opposed to a one-size-fits-all) housing or community development initiative that adds value by being responsive to the community's unique stories and needs.

Investing time and energy into getting to know and building relationships with *place* will help you understand the context in which you will bring people together to design for mutual inclusion. This context informs the *design of buildings, environments, and interactions* that cultivate the experience of mutual inclusion and belonging between residents with developmental disabilities and/or medical complexities and the wider community.

PRINCIPLE AT WORK

2 **Create place-based solutions.** Ground initiatives in the uniqueness of the community context, allowing the project to evolve out of place-based needs and desires.

What do we mean by *"place"*?

Our definition of *place* includes three contexts:

1. The **people** that live, work and play in the place;
2. The **cultures** and identities that define community; and
3. The **physical form** of the neighbourhood, including natural and built components.

> *Placemaking begins with citizens working together to improve their local environment. More than just promoting better urban design, placemaking facilitates creative patterns of use, paying particular attention to the physical, cultural, and social identities that define a place and support its ongoing evolution. This inclusive process emphasizes the collaborative 'making' that builds local capacity and leadership to empower communities.*
>
> – Co*Lab and Project for Public Spaces

Creating a place-based engagement strategy

To co-design for mutual inclusion, it's important to involve three key stakeholder in your engagement process. Understanding these groups' perspectives, desires, and needs is a critical first step.

Different engagement tools, methods, and approaches can be used for each group. We also recommend bringing all of these perspectives into "one room" on at least one occasion in your process.

Lived experts

"Lived experts" are people with lived experience of developmental disabilities and/or medical complexities, along with their family members and others who support them.

Neighbourhood

Neighbourhood stakeholders include individuals who live near your proposed mutual inclusion site, local businesses, and community organizations (e.g., Business Improvement Areas (BIAs), faith groups, ratepayer associations, etc.). This stakeholder group can also include other real estate developers looking to build a new project in the area.

Housing and service providers

This stakeholder group includes the housing developer and/or organization(s) providing housing and/or supports to residents with developmental disabilities and/or medical complexities.

What makes this approach different from traditional "engagement" or even a typical co-design exercise?

Traditionally, we have relied on housing and service providers supporting people to initiate engagements and conversations around social inclusion.

This Field Guide proposes that any of the three key stakeholder groups (or others) could initiate efforts to foster mutual inclusion, whether working on a real estate or community development project.
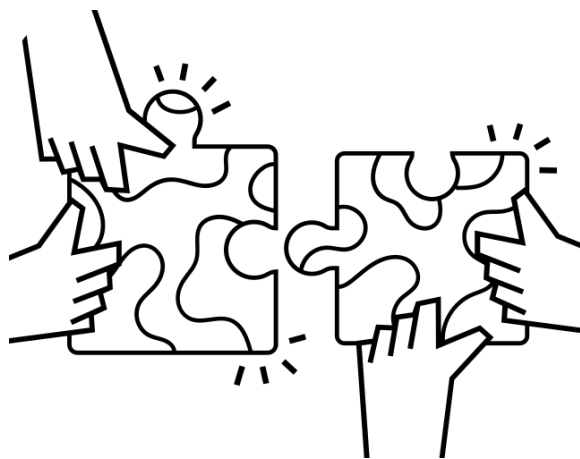
ENGAGING WITH LIVED EXPERTS

Building empathy with people with developmental disabilities and medical complexities

Understanding and empathizing with the people for whom we want to create new housing solutions is crucial. Lived experts may be supported by their family members and support workers to articulate and express their experiences, needs, and desires around housing and mutual inclusion.

Too often, new ideas are created based on assumptions about what the people we aim to serve are seeking. An engagement strategy around mutual inclusion should invite lived experts to engage in meaningful ways, leading to human-centred housing and community development solutions.

Lines of Inquiry

Some key lines of inquiry when engaging with lived experts could include:

- What is the current housing context experienced by people with developmental disabilities and medical complexities?
  - What are the challenges and opportunities from their perspective?
- What are their housing needs and desires?
- What might successful mutual inclusion look and feel like to them?

PRINCIPLE AT WORK

1

Design for and with lived experts.
Prioritize and involve people living with developmental disabilities and/or medical complexities (with those who support them) along the process of designing for mutual inclusion.

Meeting lived experts "where they are at"

A fundamental approach to keep in mind is "*meeting lived experts where they are at.*" This typically involves offering diverse engagement channels, methods, and techniques to best suit their preferences. Some participants might want to meet in person, virtually (via computer, phone, or tablet), or not at all. Some might prefer to speak alone, with friends, or with support from their family members or support worker.

The following pages include tools and methods of engagement with lived experts that you could employ:

Interviews with people with lived experience who might be accompanied by a support worker or family member

Design probes for participants to share their hopes around housing and community belonging

Needs and Desires Canvas and **Success Criteria** to turn insights into a set of desired outcomes

Lived Expert Interview

MUTUAL INCLUSION TOOL

ABOUT

A straightforward way to engage with lived experts is through a casual conversation. Speak with people to learn about where they live today, their community interactions, and their hopes and dreams for the future.

USE

Below is a sample interview guide that can prompt lived experts to share more about their home and community. Use these questions as a starting point and allow the people you are speaking with to introduce new topics that are important to them. Be mindful that people with developmental disabilities and medical complexities may have different ways of communicating; adapt questions as needed.

SAMPLE INTERVIEW GUIDE

Where you live (30 minutes)

Sample questions and prompts:

1. **Could you talk about (or show us) your home?**

2. **What do you like about where you live?**
   - Your home?
   - Where it's located?
   - Your community or neighbourhood?

3. **Who are the people you see in your community?**
   - Tell us about who you see and talk to.
   - Do you see them often?
   - When and where do you see them?

4. **Have you made a new friend in your neighbourhood?**
   - If so, how did you meet that person?
   - Do you spend time together now?
   - Tell us about what you do together.

5. **Do you have any supports where you are currently living?**
   - Staff supports?
   - Support from family members or friends?
   - Informal help and support from neighbours and people in the community?

6. **Have you lived anywhere else? If so, could you tell us about those places?**

7. **Are you in your perfect home? Why or why not?**

Your desired housing and community (30 minutes)

Sample questions and prompts:

8. **What are your goals for your housing in the future?**
   - Are you planning to move?
   - If so, when?

9. **How would your dream home be different from where you live right now?**
   - How would it make you feel to move into your dream home?

10. **Is it important to you to feel like you are included in the neighbourhood where you live?**
    - What does that mean and look like to you?

11. **Is it important to you to feel like you belong in the neighbourhood where you live?**
    - What does that mean and look like to you?

Lived Expert Design Probes

MUTUAL INCLUSION TOOL

ABOUT

Besides interviews, you can engage with lived experts through creative exercises where they can write and/or draw to communicate their experiences. Workbooks and one-page exercises can be printed out and delivered to people where they live.

USE

Have people fill out these exercises during an interview or workshop, or ask participants to fill them out in their own time. Completing exercises at home gives people the opportunity to work at their own pace, with the support (e.g. from a family member or support worker) that they want or need.

SAMPLE WORKBOOK EXERCISES

What makes you feel like you belong where you live?

When I belong, I am **thinking...**

When I belong, I am **hearing**...

When I belong, I am **seeing**...

When I belong

I am **feeling**...

When I belong, I am **saying and doing**...

What does your dream home and community look like?

What do you do for fun? (*activities, hobbies*)

What do you do for work? (*job, volunteering, studying*)

How do you meet new people?

What do people in your community help you with?

What do you do to help your community?

Framing Needs and Desires

MUTUAL INCLUSION TOOL

ABOUT

Another way to get to know the needs and desires of lived experts is to prompt them to discuss the three "layers" impacting their living environments and wellbeing:

- **Home:** The place that the individual sees as their "personal space" (e.g. their room or apartment)

- **Building:** The shared spaces where people interact with other residents, staff, and people who are invited to enter (i.e., communal areas within the building)

- **Neighbourhood:** The surrounding community that an individual can easily travel within, where they may interact with businesses, neighbours, and people passing by

PRINCIPLE AT WORK

5

Extend the boundaries of home. Create a vision of "home" for people that goes beyond the residence and into the wider neighbourhood.

USE

The image below provides a framework you can use to sort, find patterns, and derive meaning from the information gathered through the lived expert interviews and design probes. Flip to the next page to see an example of this tool at work.
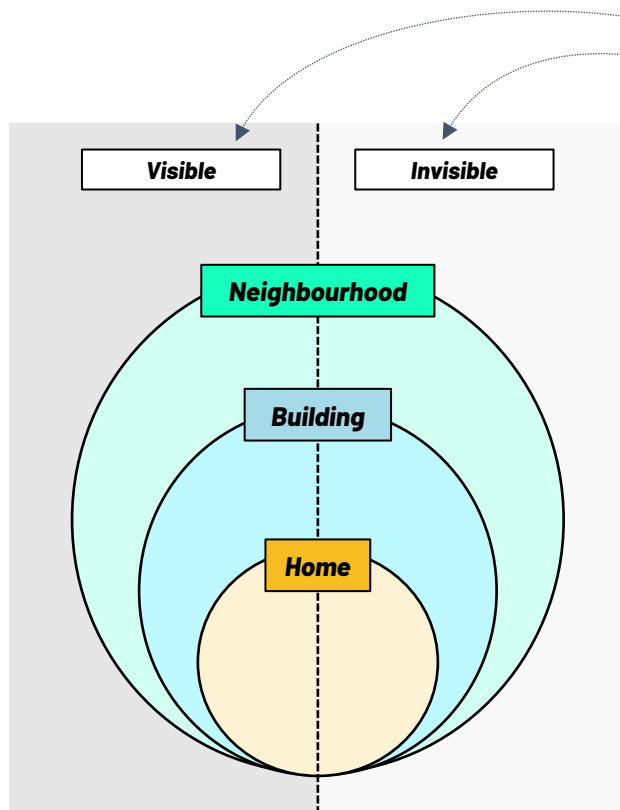
Our housing needs and desires can also be expressed through what is **visible** and **invisible**:

- The **visible needs** could include physical spaces and regular programs

"I wish I had an outdoor park space where I can hang out with my friends."

- The **invisible needs** include qualitive and felt experiences

"I wish I could chat with people about what's going on the world and feel like I'm a part of the community."

Success Criteria

ABOUT

Success criteria act as design instructions or indicators of meeting desired outcomes. These criteria should reflect the perspectives, needs, and desires of key stakeholders you engage with.
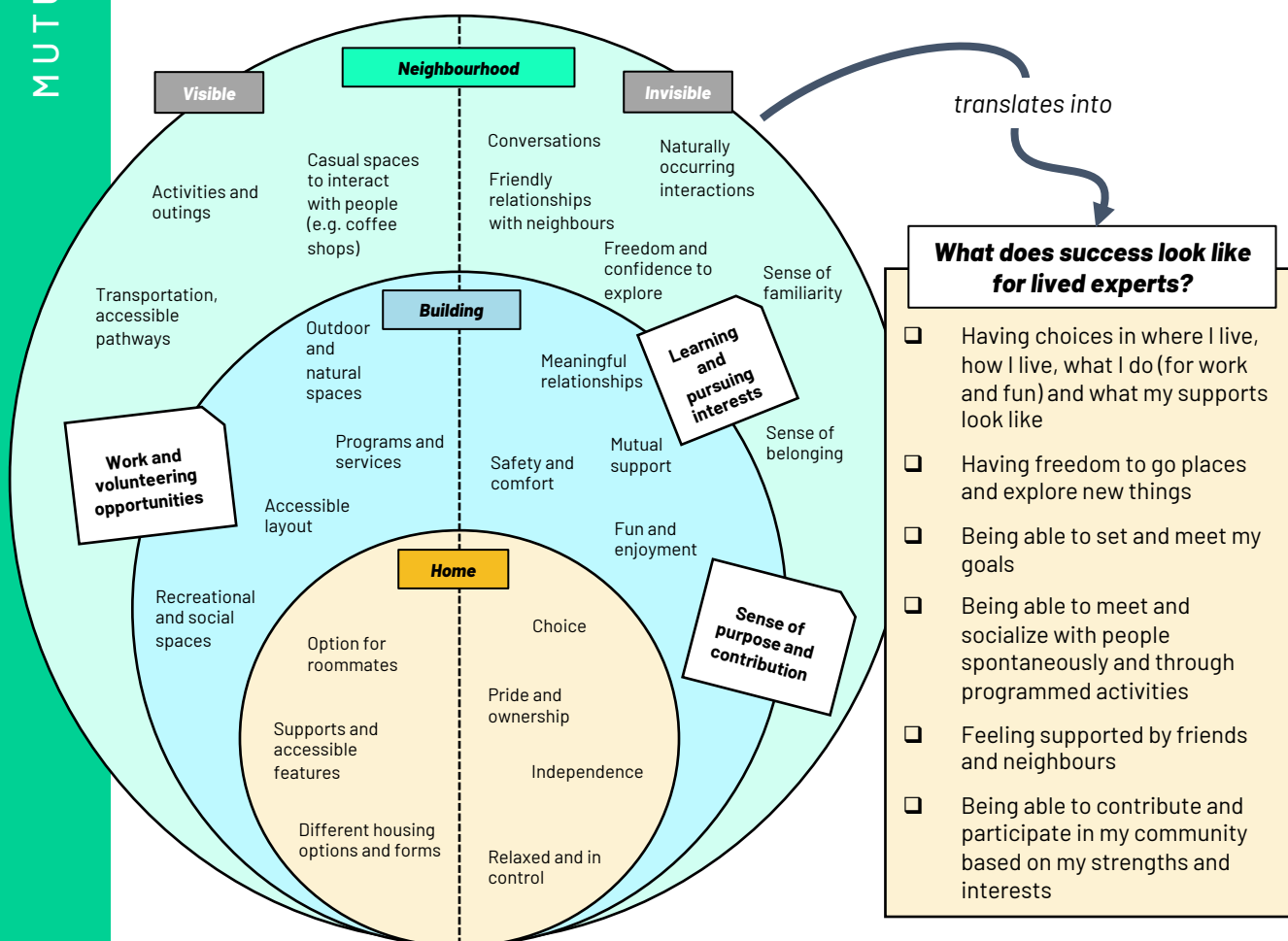
These success criteria can also be used as a framework from which new housing or community development initiatives for people with developmental disabilities and medical complexities may be generated in the "*Co-Design*" phase.

USE

Review the insights you gathered through your interviews, design probes, and framing needs and desires exercise. From those sources of information, translate the key themes into achievable outcomes. The image below shows some examples of success criteria.

Moving forward, your success criteria can be used to either evaluate ideas or generate new ones.

SAMPLE NEEDS-TO-SUCCESS CRITERIA MAPPING

translates into

What does success look like for lived experts?

- ❑ Having choices in where I live, how I live, what I do (for work and fun) and what my supports look like
- ❑ Having freedom to go places and explore new things
- ❑ Being able to set and meet my goals
- ❑ Being able to meet and socialize with people spontaneously and through programmed activities
- ❑ Feeling supported by friends and neighbours
- ❑ Being able to contribute and participate in my community based on my strengths and interests

ENGAGING WITH THE NEIGHBOURHOOD

Empathizing with local community members and organizations

One of the first steps of developing an engagement strategy with place-based stakeholders is determining who should be at the table. The people you engage with will be different for every location. Generally, this group may include:

- Neighbouring residents
- Resident groups
- Cultural communities
- Arts and culture organizations
- Non-profit organizations and agencies
- Community housing providers
- Small and large local businesses
- Business Improvement Areas (BIAs)
- Ratepayer associations
- Schools
- Faith-based institutions

Lines of Inquiry

Some key lines of inquiry when engaging with community members might be:

- What are the current perspectives and experiences of place-based community stakeholders around interacting with people with developmental disabilities and medical complexities?
  - What are possible barriers to interactions and relationships?
  - What are potential enablers?

- What do they wish they had more of in their neighbourhood? What would add value or fulfill a need?

PRINCIPLE AT WORK

3

Engage the community early as collaborators. Identify and bring community stakeholders (e.g., community groups, local organizations, businesses, neighbours) into the conversation, as early as possible.

Build and invest in trust early

From consultation with community members, a significant challenge related to fostering mutual inclusion is the potential of opposition from some community members.

Identifying and engaging key influencers in the community is an important tactic to help understand the neighbourhood context and identify potential roadblocks. These early engagements also forge the path for community stakeholders to become future champions and collaborators who support and are invested in your mutual inclusion initiative. It is important to remember that building trust with the community is a long-term process.

The following page contains a tool to help you engage with neighbourhood perspectives:

Community mapping interviews with local community members

Community stakeholders' perspectives can also be synthesized into a set of success criteria (described on page 24).

Community Mapping Interviews

ABOUT

One of the first modes of engagement could be hosting conversations and interviews with community members. This can happen by first connecting with a key local organization (such as a community group or the BIA) that is trusted, recognized and well-connected in the neighbourhood.

Investing in building relationship with a key community group can be a good starting point to understand the place-based context and needs of the community, as well was begin mapping the key stakeholders of influence. The community map might include businesses, schools, libraries, and cultural organizations that are central to the neighbourhood.

From here, you can begin to conduct "snowball sampling", a method whereby you recruit the next community stakeholder by asking the interviewee who else might be best or most relevant to connect with. From there, you begin to build a map of community perspectives.

USE

You might connect with community stakeholders by attending existing meetings or community events (e.g. street festivals) or purposely invite them into an engagement. It can be helpful to shared information with community stakeholders about who you are, what you do, and what you're hoping to accomplish in the specific community (e.g., introduction to mutual inclusion).

SAMPLE COMMUNITY INTERVIEW QUESTIONS

Understanding Mutual Inclusion in Housing

1. Have you interacted with people with developmental disabilities and/or medical complexities in your community? Could you describe those experiences?

2. What are some existing places in the community where social interactions between people with developmental disabilities and/or medical complexities and the wider neighbourhood could take place?

2. How could the design of future housing and community spaces help enhance the social fabric of the community?

3. What are potential barriers and risks that we should be aware of when designing to foster inclusion between people with developmental disabilities and/or medical complexities and the wider neighbourhood?

4. Suppose future housing options for people with developmental disabilities and/or medical complexities were designed to "invite" the broader community in. What might those spaces or experiences look like?

5. Suppose future housing options for people with developmental disabilities and/or medical complexities were created "with" the community in which they would be located. What might those consultations or conversations look like? Who should be involved?
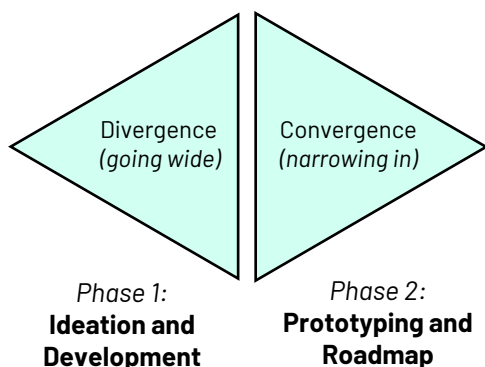
Step 2: Co-Design

Why is co-design important to mutual inclusion?

The spirit of co-design is to not simply design for, but **design with** the people that you seek to serve. You may invite lived experts and community members into a co-design process that impacts the **built form** of a building or space, as well as the creation of **programs** that bring community and residents together.

Mutual inclusion is an opportunity to not simply understand the needs and desires of your key stakeholders, but invite them into the process of creating and developing the housing solutions and interventions that will impact them and their community.

The process of co-design not only strengthens place-based relationships through trust and reciprocity, but also enhances the innovative and creative potential of what can be created with all the stakeholders involved. The interventions and solutions that are co-created should be desired by all the stakeholders impacted and include potential roles and contributions for each actor.

In this section, we share tools and methods for a **co-design process** of designing for mutual inclusion that follows these phases:

Divergence
(going wide)

Convergence
(narrowing in)

Phase 1:
Ideation and Development

Phase 2:
Prototyping and Roadmap

4   **Emphasize trust, collaboration, and reciprocity.** Build trust between stakeholders by collaborating openly and looking at creating mutual benefits through new roles, assets, and contributions.

Convening a place-based "mutual inclusion" team

One of the first steps is to convene a multi-stakeholder "mutual inclusion" working group or team. We recommend forming a small team (6 to 10 people) of committed stakeholders, convened by the lead organization (e.g., the developer, housing or program provider), and then inviting other participants into the process at various points. The team should include:

- **Lived experts** (people with developmental disabilities and/or medical complexities, their family members and support workers)
- **Place-based community stakeholders** (local community groups, BIAs, community leaders, etc.)

Other mutual inclusion stakeholders might include:

- **Local policy-makers and politicians** (e.g., municipal councilors, civil servants in urban planning, parks and recreation, etc.)
- **Subject matter experts** that are relevant to the potential housing and community development initiatives (e.g., if a food-related pathway to mutual inclusion is being considered, local food groups or farmers could be invited in)

IDEATION & DEVELOPMENT

Brainstorming potential ideas and solutions

The place-based mutual inclusion team could be invited to participate in a series of **ideation** and **development** engagements (e.g., workshops) to collectively work on potential ideas to foster mutual inclusion.

These engagements enable lived experts and community members to contribute to custom place-based solutions (e.g. design and architectural recommendations for built form, new programs and event offerings) that benefit them, while creating opportunities for enhanced interactions.

Whether they take place virtually or in-person, workshops can be a fun and creative way to bring place-based actors into a room together to discuss opportunities for mutual inclusion. Through playful and imaginative ideation exercises, the group can collaborate and think outside-the-box around what they wish to see in the community.

A useful way to frame the ideation and development activities is to build on the collective success criteria and insights generated from the "*Contextualize*" phase.

Lines of Inquiry

Key lines of inquiry in the ideation and development workshops might be:

- What are the potential ideas and solutions that can lead to mutual inclusion?

- How do we refine and prioritize the solutions that we want?

PRINCIPLE AT WORK

7 **Create a system of interactions.** Think about including different points (e.g., physical spaces, programs, events) that could bring people together in intentional ways.

"Going wide" with desirability

The phase of ideation and development is one of **divergence** - going wide and generating many possible ideas. It is important to create a container that encourages participants to focus on possibility rather than constraints. This means bringing a mindset of *"yes, and..."* rather than *"yeah, but..."* to the conversation.

The focus here is to generate from a lens of what would be desirable for our community.

The following pages includes tools and approaches to support the co-design process:

Pathways to Mutual Inclusion: we created five potential pathways to mutual inclusion that can be used as starting points when generating ideas

Group ideation canvas for participants to share and work together on ideas to foster mutual inclusion

Pathways to Mutual Inclusion

ABOUT

These five potential pathways to mutual inclusion are starting points to help generate ideas that range from built-form features to programs, services, and experiences. They include different considerations around the "shape" your solution(s) might take.

USE

These "pathways to mutual inclusion" cards can be printed and shared in ideation and development workshops. They can be given to break out groups of 4-5 people to help prompt and generate a diversity of ideas for mutual inclusion.

PLAY

What are mutual inclusion opportunities through **socialization and play?**

CONSIDER:

Physical spaces that are accessible to residents and community members (e.g., sitting areas, café, classroom, multi-purpose space)

Furniture, equipment, and other features within the space (e.g., kitchen, accessible furniture, technology)

Services, events, and programs that take place in the space (e.g., art classes, exhibitions, children's programming, health services)

LIVE

What are mutual inclusion opportunities through **innovative forms of housing and living arrangements?**

CONSIDER:

Housing models with different resident mixes that could include people with and without disabilities (e.g., co-op, mixed building, homeshare)

A **location** where people with developmental disabilities and/or medical complexities can live in proximity to family, friends, employment, and other places of importance

Mixed-use housing for people with developmental disabilities and/or medical complexities that includes services and amenities for residents while inviting the broader community in

NOURISH

What are mutual inclusion opportunities through **through growing, sharing, cooking, and eating food together?**

CONSIDER:

🌱 A *garden or community farm* that is accessible and inviting to residents and community members

🍴 A *service or social enterprise* (e.g., a market, restaurant, café,) that feeds the community, while creating jobs and revenue.

📅 *Educational programs* that will teach food-related skills (e.g., cooking, gardening, food service) to residents and community members

SHARE

What are mutual inclusion opportunities through **skill- and passion-sharing between residents and others in their community**?

CONSIDER:

📱 *Social media platform or tool* where people can connect and share their interests with each other

🏢 *Physical space(s)* where residents and community members can gather around skill-sharing

⛺ A *program of events and experiences* that residents and community members can partake in (e.g., a skill-sharing fair, workshop)

CELEBRATE

What are mutual inclusion opportunities through **encouraging people to celebrate and express their culture and values?**

CONSIDER:

🚩 **A program of cultural events** where the diverse cultural traditions of the community are celebrated

✾ **Engagement with local faith and cultural groups** (e.g., churches, mosques) and creating shared spaces for specific cultural uses (e.g., prayer room, healing garden)

✌ **Volunteering opportunities** that allow the community and residents to connect on shared values (e.g., climate action, social equity)

Group Ideation Canvas

ABOUT

While the *pathways to mutual inclusion* tool invite participants to generate as many ideas as they can, the purpose of this group ideation canvas is to enable the synthesis and prioritization of people's ideas.

USE

Start this process by putting all the different ideas generated into one space. Next, the group will determine the top idea(s) that have the most potential for impact and fill out the rest of the canvas.

What could this idea look like?

Add your collective ideas here.

Prioritize 1–2 top ideas.

What more can you add to these ideas?

How is this prioritized idea desirable?

Check against success criteria.

What would make this prioritized idea feasible and viable?

What resources (people, money, time, etc.) are needed?

MUTUAL INCLUSION TOOL

PROTOTYPING & ROADMAP

Prototyping and refining ideas

Let's assume that a lot of ideas for mutual inclusion have been generated and then refined in the ideation and development phase. The phase of prototyping and roadmap helps the mutual inclusion team figure out how a proposed initiative could be realized through collaboration between the housing developer, residents, and neighbours.

The purpose of **prototyping** is to build out potential ideas so that you can understand how they might work, as well as "test" them with others. It's an opportunity to experiment and play with the different forms your ideas might take and the different parts within them. By the end of the prototyping process, the group should understand the strengths and weaknesses of proposed initiatives for mutual inclusion and what it would take to bring them to life.

When you are weighing different options to pursue, prototyping can help evaluate which ideas to move forward into implementation. The next step of generating a **roadmap** allows you to map the tangible next steps, milestones, key stakeholders, and resources required to bring the solution to life.

PRINCIPLE AT WORK

4 **Emphasize trust, collaboration, and reciprocity.** Build trust between stakeholders by collaborating openly and looking at creating mutual benefits through new roles, assets, and contributions.

Lines of Inquiry

Key lines of inquiry in the prototyping and road-mapping workshops might include:

- How do we simulate the prioritized ideas and solutions to better understand the potential blind-spots, risks, and opportunities?

- Is this mutual inclusion solution viable? Who or what will be financially resourcing its development and ongoing sustainability?

- Is this mutual inclusion solution feasible to implement? What are the roles, capabilities, and resources required?

Narrowing down to what is feasible and viable

The phase of prototyping and roadmap is one of convergence - narrowing possibilities for mutual inclusion to what is feasible and viable for implementation.

Tools and methods

The following pages includes tools and approaches to support the prototyping and roadmap co-design phase:

Solution prototyping canvas: A tool to flesh out the potential solution.

Roles and contributions canvas: A tool to explore the roles and contributions of each stakeholder.

Roadmap canvas: A tool to generate tangible action items and milestones.

Solution Prototyping Canvas

MUTUAL INCLUSION TOOL

ABOUT

A prototyping workshop can be hosted to to further build out prioritized ideas for mutual inclusion. For example, the participants might:
- Create a physical "model" of the idea (e.g., a floor plan)
- Draw or act out an interaction (e.g. a storyboard of a program or service)

USE

The canvas tool below is a simple tool that can be used in a workshop to help bring ideas to life. Alongside this canvas, arts and craft materials could also be provided to encourage more creative prototypes of solutions.

WHAT DOES IT LOOK AND FEEL LIKE?

Draw or describe the idea– try to bring it to life through telling a story about how this solution could foster an interaction between a resident and a community member.

OPPORTUNITIES / ENABLERS

What would support the success of this solution? Think from the lens of desirability, feasibility, and viability.

BARRIERS / RISKS

What are the potential barriers and risks that need to be considered?

COLLABORATORS

Who would need to be involved in implementing and sustaining this mutual inclusion initiative?

Roles and Contributions Canvas

ABOUT

The intent of mutual inclusion is that housing providers, neighbours, and residents all have a part to play in shaping positive social outcomes. Here, we explore what the potential contributions, roles and assets of each stakeholder could look like.

USE

Once concrete ideas for mutual inclusion have been prioritized and solidified, the canvas tool below can be used in discussions to help determine how the initiative for mutual inclusion could be realized through shared contributions, roles, and assets.

MUTUAL INCLUSION TOOL

Residents

Contributions, roles, and assets:

Neighbours

Contributions, roles, and assets:

Housing Provider

Contributions, roles, and assets:

Collective first steps:

What are the 1-3 next steps that need to be taken in order to move this idea forward?

Roadmap Canvas

MUTUAL INCLUSION TOOL

ABOUT

The process of creating a roadmap allows the team to list out the tangible action items and milestones required to implement the solution. It also invites stakeholders to commit to their contributions and roles.

USE

The canvas below is a generic roadmap template that can be used in planning discussions for implementation. They include prompts around the key actors and roles and resources required to meet each milestone.

	Short-Run (1 to 12 months)	Medium-Run (12 to 18 months)	Long-Run (18+ months)
Key Milestones What are some key milestones towards implementing this initiative in the short-medium-long run?			
Key Actors and Roles Who needs to be involved and committed to bring this mutual inclusion solution to life and what do their responsibilities look like?			
Resources Required What resources (people, money, time, etc.) are required and how will they be obtained?			

Step 3: Cultivate

Implementing and cultivating mutual inclusion

This final phase involves working together to **implement, evaluate, and iterate upon** your mutual inclusion initiative.

This step could involve launching a small-scale pilot or fully implementing a new housing development, program, service, or community initiative. Throughout the implementation process, lessons learned should be documented, contributing to the community of practice on mutual inclusion.

From Field Guide to open field

This Field Guide provides a *simplified version* of some of the tools, methods, and approaches that can be used to bring people with lived experience, housing providers, real estate developers, community agencies, neighbourhood groups, and people with lived experience together to create new experiences and living arrangements that foster deeper connections.

However, fostering mutual inclusion between people with developmental disabilities and medical complexities and their surrounding neighbourhoods and communities is not a linear process. The field work of mutual inclusion happens *"in the wild",* in rich place-based contexts that are always shifting and changing.

Ongoing evaluation and adaptation

The final step is a reminder to remain flexible and adaptable to future opportunities to infuse mutual inclusion even after your project is completed.

Maintaining mutual inclusion requires ongoing work, monitoring results, and adapting your programs, services, or buildings based on shifts in needs, community, or social dynamics.

It is helpful to refer to (and continue to update) the success criteria created in *"Step 1: Contextualize"* to reflect on whether the desired outcomes and qualitative indicators of mutual inclusion have been met from the perspectives from key stakeholder.

The **reflection questions** on the next page can be used to help with ongoing evaluation and cultivation of mutual inclusion.

Reflection

Creating a Practice of Continuous Learning

Contribute to knowledge creation around mutual inclusion by reflecting on what you learned and sharing your lessons with the housing and developmental services communities.

Use this guide as starting point. Conversations may flow beyond these questions, especially if undertaken in a group setting. This guide generally follows the "What; So, What; Now, What" format from Liberating Structures.

WHAT?

1. What happened? How would you describe the process we went through together?

2. What did you notice and what observations stood out?

3. In what ways have we improved at this kind of work?

4. In what ways do you think we need to improve for next time?

5. What challenges did we encounter while we were working through infusing mutual inclusion in our work?
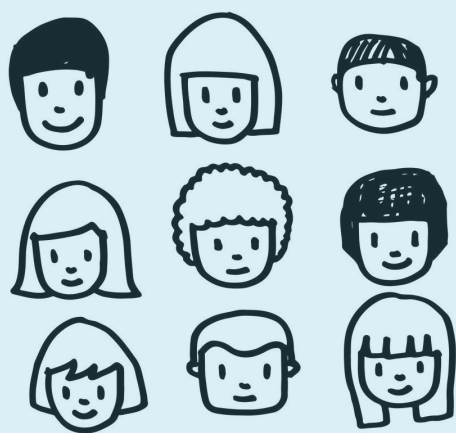
6. How did we address those challenges?

7. What mutual inclusion tools did you use while working on this initiative (especially those which are different than a typical development process)?

8. Which tools were especially helpful? Which ones would you use again?

SO, WHAT?

9. What story does this work tell about mutual inclusion in housing or about your community?

10. Why is this story important?

11. What patterns or conclusions are emerging?

12. What were your goals for this initiative? Did your goals change as you worked on it? Did you meet your goals?

13. What does this initiative reveal about your team or your organization or your community?

NOW, WHAT?

14. What next steps will you take?

15. How will this way of working impact future initiatives and work in your team or organization?