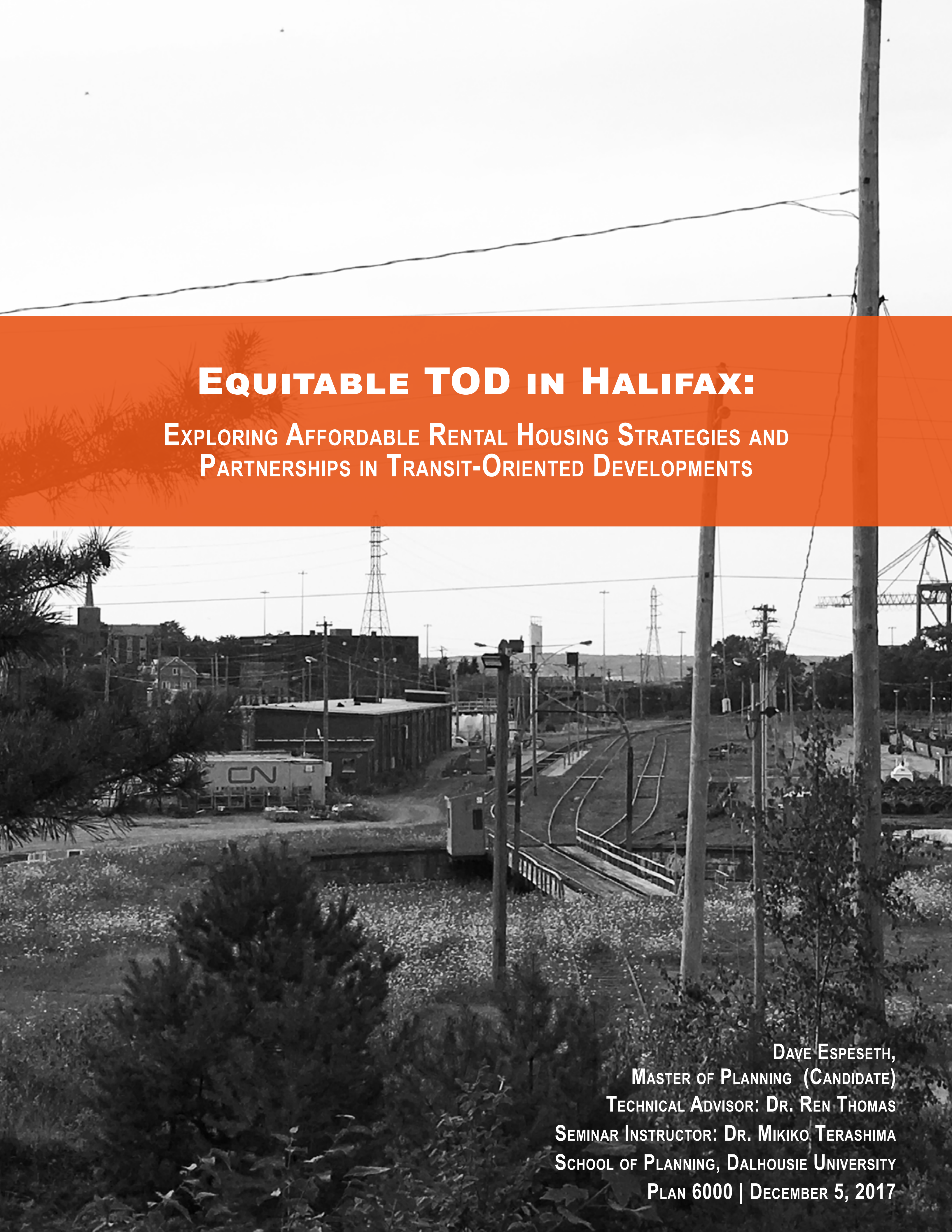

Equitable TOD in Halifax:

Exploring Affordable Rental Housing Strategies and Partnerships in Transit-Oriented Developments

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Cover Image: CN Rail Yard Adjacent to Joseph Howe Future Growth Node

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Executive Summary

Transit-oriented development (TOD) is identified in two recent Halifax Regional Municipality (HRM) plans, the Centre Plan and the Integrated Mobility Plan. TOD seeks to shift transportation mode-share from private vehicles to transit and active transportation by intensifying mixed-use development around transit infrastructure (TransLink, 2012; van Lierop, Maat, & El-Geneidy, 2017). While TOD can help address issues such as public health, sprawl, and climate change, it may also exacerbate rental housing retention, housing affordability and social equity issues (Grube-Cavers & Patterson, 2015; Jones, 2015; Langlois, M., van Lierop, D., Wasfi, R., & El-Geneidy, A., 2015).

Residents near the Bayers Road Centre in North West Halifax could be impacted by TOD initiatives. This area is identified as a Future Growth Node in HRM's Centre Plan. Future Growth Nodes will focus mixed-use development at higher densities than much of the municipality and will consider TOD in their design (HRM, 2017a). The census tracts that intersect the Joseph Howe Future Growth Node are characterized by a high proportion of renters, lower median household income, and higher percentages of single parent households, individuals identifying as Aboriginal and recent immigrants than elsewhere in HRM (Canadian Census Analyser, 2017a, 2017b, 2017c). These characteristics indicate that households in this area are more likely to face housing affordability challenges (SHS Consulting, 2015).

Equitable TOD is one strategy that may help address housing affordability challenges in transit-oriented communities. This approach builds on the principles of TOD by integrating affordable housing to ensure these areas meet the needs of low- and moderate-income residents (Hersey & Spotts, 2015). Equitable TOD literature reveals four best practice themes. These include planning and coordination, land access and acquisition, incentives and regulations, and financial tools and programs. These themes provide a framework for conceptualizing the components of an effective equitable TOD approach and a way to evaluate HRM's capacity for it.

Realizing equitable TOD in HRM requires improved planning and coordination between affordable housing and transit initiatives as well as programs to support land access and acquisition. Three equitable TOD cases provide insight into strategies to address these gaps. Based on this analysis, eight recommendations are provided to support the achievement of equitable TOD in the Joseph Howe Future Growth Node and in other locations within HRM where TOD may be considered.

1. Introduction

Halifax Regional Municipality (HRM) is adopting policy goals to intensify development and prioritize pedestrians, cyclists, and transit over private vehicles and is considering transit-oriented development (TOD) as one approach to achieve these policy goals (HRM, 2016a, 2017a). The Municipality is currently experiencing a development boom that is coinciding with two major municipal planning processes, the Centre Plan and the Integrated Mobility Plan. The Centre Plan is designed to focus growth in Halifax and Dartmouth within the Circumferential Highway (HRM, 2017a). The Integrated Mobility Plan seeks to guide transportation investments throughout the Municipality. These two plans are depicted in Figures 1 and 2. As well, HRM is investigating the repurposing of a rail line as a commuter rail corridor and is evaluating the potential for bus rapid transit (HRM, 2016a, 2017b). Collectively, these plans and initiatives are seeking to build a much different future where rapid transit and TOD is more prominent.

TOD can address pressing issues facing municipalities such as public health, sprawl, and climate change as the approach seeks to concentrate mixed-use development and shift the transportation mode-share from private vehicles to transit and active transportation (Jones, 2015; Langlois, et al., 2015). While the potential benefits of TOD are wide-ranging, these developments may intensify rental housing retention, housing affordability and social equity issues (Grube-Cavers & Patterson, 2015; Jones, 2015).
Housing affordability is a growing concern within HRM. A recently completed housing needs assessment determined that 25% of all households are facing affordability challenges and that a disproportionate number of these households are renters (SHS Consulting, 2015). Nearly 43% of renters are spending more than 30% of household income on shelter and almost 22% of renters are spending more than 50% (SHS Consulting, 2015). The assessment also determined that certain types of households are more prone to housing affordability challenges. These include single parent, one-person and youth-led households; non-family households with more than two people; individuals with disabilities; recent immigrants and Aboriginal-led households (SHS Consulting, 2015).

Increased demand for rental housing, reduced household size and a growing need for more affordable housing (i.e. non-market units) are anticipated over the next decade (SHS Consulting, 2015). HRM has made a commitment to address housing affordability within the last few years. However, this commitment to housing affordability needs to consider the potential impact of TOD and rapid transit. Research has demonstrated that TOD has a positive impact on land values which can be reflected in rising housing costs (Bartholomew & Ewing, 2011; Pollack, S., Bluestone, B., & Billingham, C., 2010; Wardrip, 2011; Zuk, et. al 2015). This relationship between TOD and housing is increasingly relevant to ensure that low-income households, who are known to derive significant benefits from transit, are not marginalized by developments that enhance access to it (Debrezion et al., 2007; van Lierop, Maat, & El-Geneidy, 2017).

Figure 1. Centre Plan Urban Structure (HRM, 2017a)

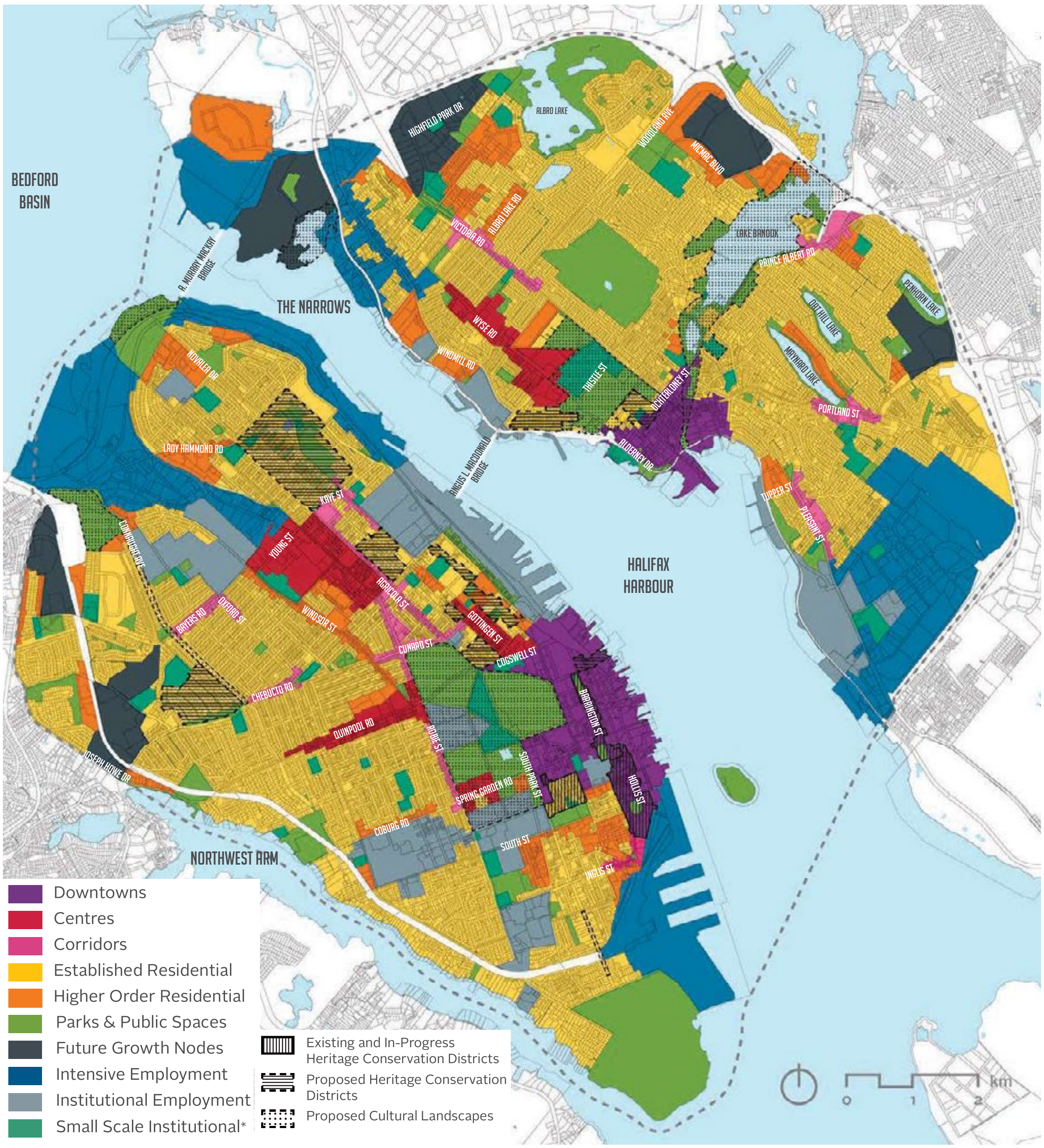
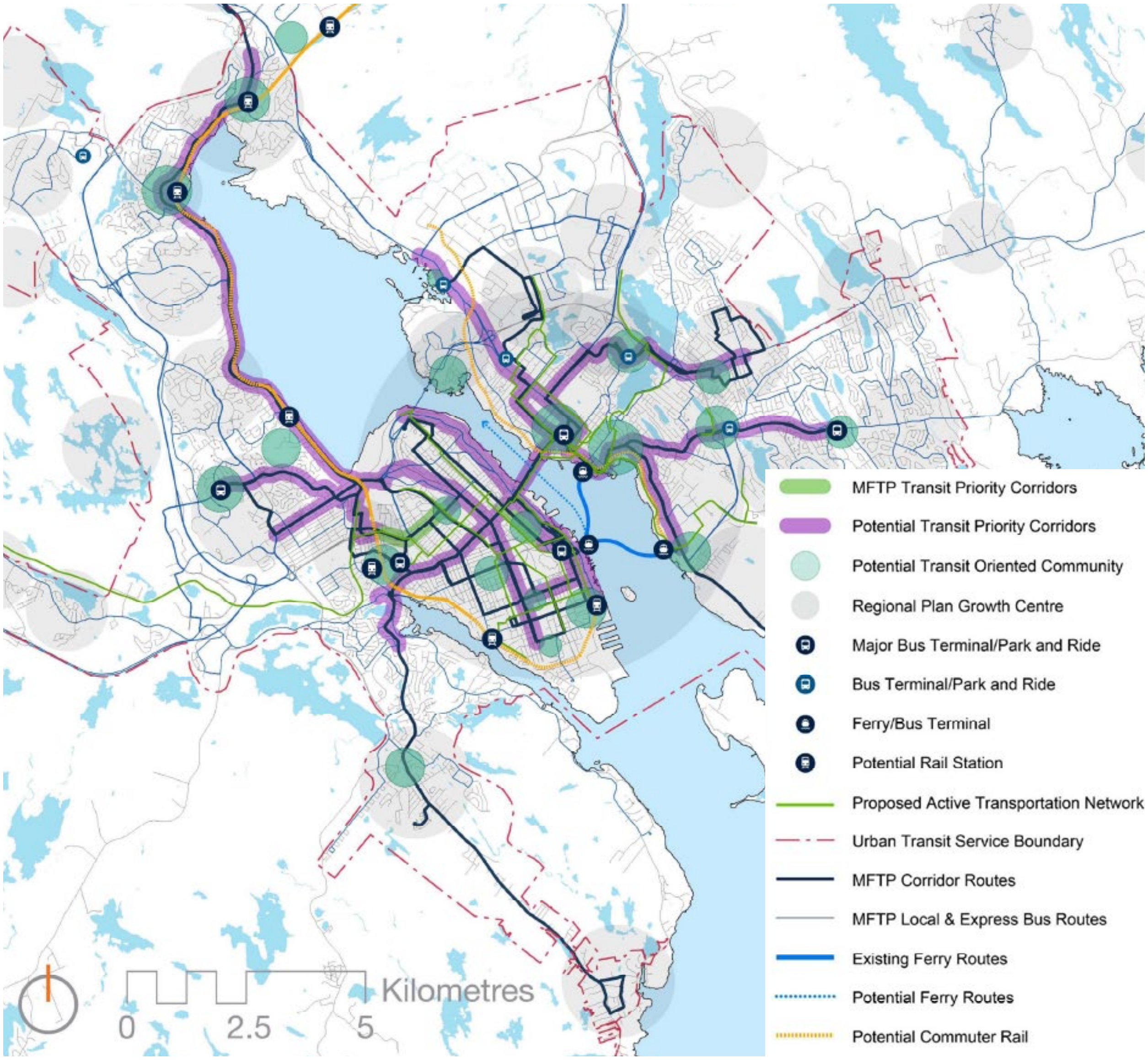
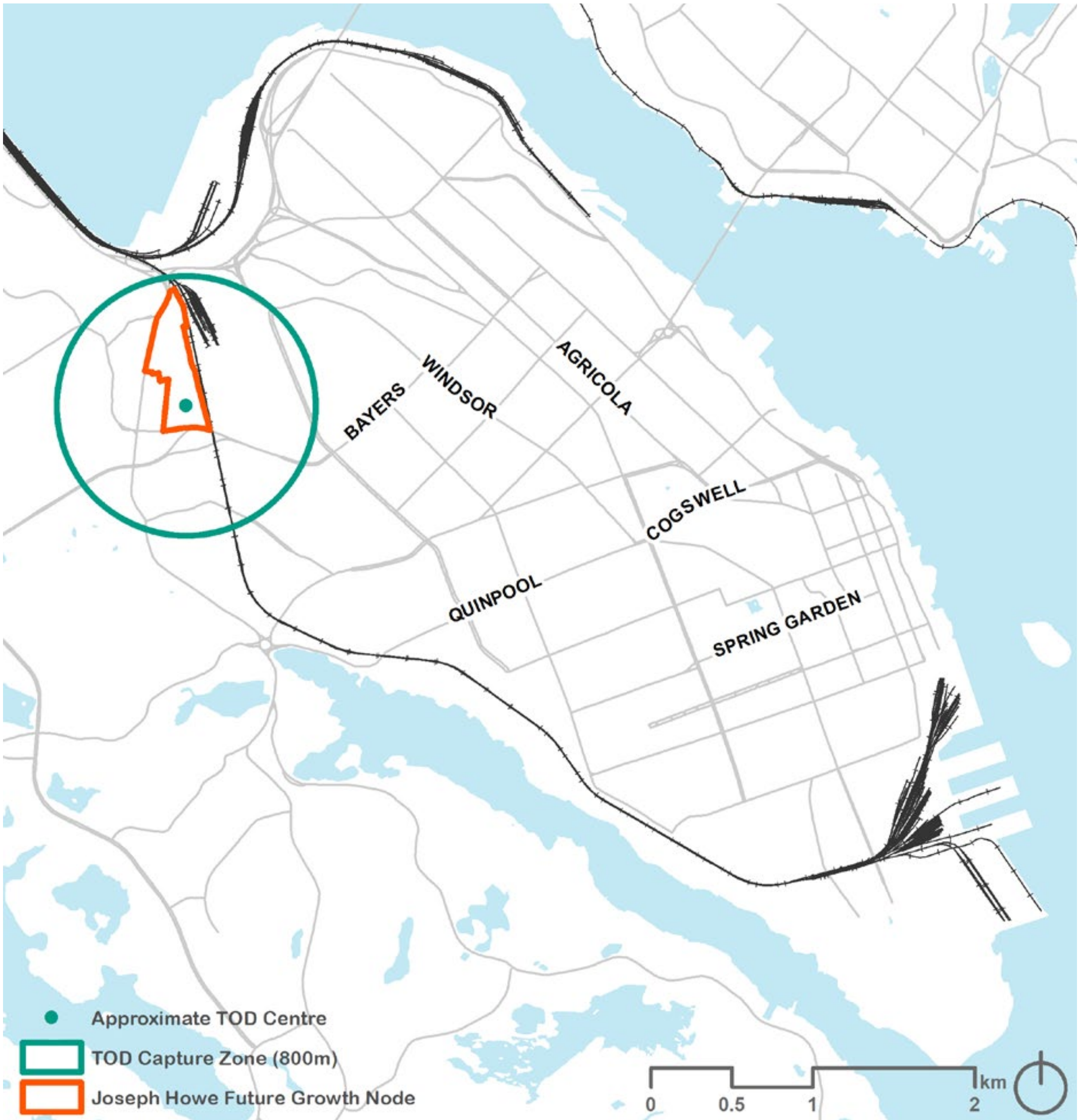


Figure 2. Integrated Mobility Plan (HRM, 2016a)



TOD initiatives near the Bayers Road Centre in North West Halifax could impact area residents. These residents border a Future Growth Node, as designated in the Centre Plan and are adjacent to the many potential rapid transit initiatives (HRM, 2016a, 2017a). This area is referred to as the Joseph Howe Future Growth Node (see Figure 3). Future Growth Nodes will focus mixed-use development at higher densities than much of the Municipality and will consider TOD in their design (HRM, 2017a). Although the Centre Plan identifies Future Growth Nodes as candidates for TOD, the Joseph Howe Future Growth Node is not identified as a potential transit-oriented community in the draft Integrated Mobility Plan.

Figure 3. Joseph Howe Future Growth Node (Espeseth, 2017a)



The census tracts that intersect this Future Growth Node are characterized by a high proportion of renters, lower median household income, and higher percentages of single parent households, individuals identifying as Aboriginal and recent immigrants than elsewhere in HRM (Canadian Census Analyser, 2017a, 2017b, 2017c). These census tracts include many characteristics that indicate housing affordability challenges are likely (SHS Consulting, 2015). While the development of Future Growth Nodes such as the Joseph Howe Growth Node have the potential to improve access to jobs, amenities and affordable transportation alternatives, they may also exacerbate housing affordability.

Equitable TOD is one approach that may strike a balance between development of areas around rapid transit and the potential housing affordability issues. This approach utilizes the principles of TOD but provides an emphasis on serving low- and moderate-income households (Hersey & Spotts, 2015). This project explores the concept of equitable TOD and evaluates the capacity for it within HRM. More specifically, this project aims to identify strategies to preserve and create new affordable rental housing in TOD areas such as the Joseph Howe Future Growth Node, as renters may face greater affordability challenges.

This paper begins with a literature review on affordable housing, gentrification and displacement, and the role of TOD. A brief summary of the affordable rental housing policy and funding framework in HRM is also provided. The paper then proceeds with a review of equitable TOD literature, an examination of HRM affordable rental housing strategies and partnerships and an evaluation of cases from three American municipalities. The paper concludes with a discussion of equitable TOD within HRM context and provides recommendations to build capacity towards it.

Two Storey Walk-ups Behind the Bayers Road Centre

2. Literature Review

2.1 Housing Affordability

Housing is considered affordable when households spend less than 30% of their gross household income on shelter costs (CMHC, 2017a). Shelter costs include rent or mortgage payments as well as heat, water, electricity and other municipal services (Statistics Canada, 2016). The factors that influence housing affordability are numerous, complex and interrelated. While the issue generally distills down to a balance between supply and demand, the drivers of supply and demand are many. Demographics, household income, economic growth, land costs, interest rates, access to financing, cost of construction, cost of ownership and utility costs are just a few of the factors that form the complex framework of housing affordability (Black, 2012; City of Calgary, 2008; CMHC, 2014a). Layered on top of this is a federal, provincial and municipal policy context which can incentivise or regulate the creation and preservation of housing. Thus, all three levels of government in addition to landlords, private developers, non-profits and co-operatives play important roles in housing affordability.

Hulchanski (2007) states that Canada "relies almost exclusively on the market mechanism for the provision, allocation, and maintenance of housing" (p. 1). As such, the majority of Canadians meet their housing needs in the private sector (CMHC, 2017a). One way private market housing has become affordable is through a process called filtering. Simply put, private market housing can become more affordable over time as units age and new units are produced (Black, 2012; Zuk & Chapple 2016). However, filtering can take generations and researchers are unclear if it yields any appreciable benefits to low-income households (Black, 2012; Freeman & Schuetz, 2017; Zuk & Chapple 2016).

When households are not able to afford private market housing, government, non-profits and co-operatives attempt to close that gap (CMHC, 2017a). The Canada Mortgage and Housing Corporation's (CMHC) housing continuum provides a way to conceptualize housing affordability using two main categories, market and non-market housing. Market housing is generated and prices are set through the private market (SHS Consulting, 2015). Market housing includes rental housing and homeownership. Non-market housing is primarily rental housing and is created, owned or operated by a public entity, non-profit or co-operative and is subsidized in some manner (SHS Consulting, 2015). The term social housing is often used interchangeably with non-market housing. Figure 4 depicts the housing types along the continuum while Table 1 provides descriptions for non-market housing types.

Figure 4. Housing Continuum (CMHC, 2017a)

Table 1. Non-Market Housing Types (adapted from SHS Consulting, 2015)

Emergency Shelters	• Short-term temporary housing • Targeted to those in emergency situations
Transitional Housing	• Longer term temporary housing • Provide access to support services on or off-site • Targeted to working homeless and families in unsafe situations
Supportive Housing	• Permanent housing • Supported by rental subsidies • Targeted to those who cannot live independently
Subsidized Housing	• Permanent housing • Includes public housing, rent supplements and housing provided by co-operatives and non-profits • Public housing is owned and operated by provincial governments • Targeted to low- and moderate-income households

2.2 Gentrification and Displacement

Gentrification is defined as a process by which low-income areas transition to high income, and variables such as rent and property values increase at a rate greater than that of the entire municipality (Jones, 2015). This process of neighbourhood change can compound housing affordability issues and disproportionately impact renter households by interrupting the process of residential filtering as older housing stock becomes more desirable for wealthier households, increasing housing costs and displacing residents (Black 2012; Zuk & Chapple 2016; Freeman & Schuetz, 2017; Newman & Wyly, 2006; Pollack et al., 2010).

Gentrification has been studied widely, yet the most significant impact and continually debated issue is the relationship between gentrification and residential displacement (Hyra, 2015; Jones, 2015; Freeman & Schuetz, 2017; Rayle, 2015; Zuk et al., 2015). Freeman and Schuetz (2017) suggest one reason why studies of direct displacement have yielded "mixed" results is that lower income residents are less financially stable and are more likely to move regardless of gentrification pressure. However, other researchers argue the mixed results stem from issues with research methods, lack of data and study design (Rayle, 2015; Zuk et al., 2015). Zuk et al. (2015) indicated research on residential displacement has typically focused on measuring direct displacement of existing residents (e.g. residents being evicted or no longer being able to afford to live in a neighbourhood). Zuk et al. (2015) and Rayle (2015) suggest that direct displacement only captures one dimension of displacement and does not effectively represent the impact of gentrification.

A more comprehensive understanding of the dimensions of displacement are put forward by Marcuse (1985) and Chernoff (1980). These authors identify three broad types of displacement which include direct, exclusionary and social. Marcuse (1985) states direct displacement occurs through physical or economic processes (e.g. existing households are evicted or can no longer afford rent increase). Marcuse (1985) also suggests that exclusionary displacement occurs when households that would have otherwise moved into a neighbourhood cannot (e.g. properties are demolished or are no longer affordable). Chernoff (1980) adds another element, citing social displacement as something that occurs when existing residents lose political power or feel their lifestyle is threatened.

Variations of social displacement are supported by Hyra (2015) and Freeman and Schuetz (2017). The authors do not explicitly describe social displacement. However, the descriptions suggest similarities to Chernoff's concept. Hyra (2015) expands on the concept of social displacement through an exploration of political and cultural displacement. In this context, political displacement is described as the process where existing racial or ethnic groups are outnumbered and lose political power, while cultural displacement is described as changing cultural norms or values (Hyra, 2015). Freeman and Schuetz (2017) do not offer any new displacement terminology, but they suggest gentrification can make existing residents feel as though they are being "pushed out" of their neighbourhood. This perception can generate feelings that new amenities are not for them, make existing residents feel unwelcome and may eventually result in them leaving the neighbourhood (Freeman & Schuetz, 2017).

The literature suggests that direct displacement resulting from gentrification is somewhat inconclusive. However, direct displacement is only one of the many dimensions of displacement. Gentrification can result in other types of displacement such as exclusionary, social, political and cultural displacement, which can negatively impact low- and moderate-income households.

2.3 Transit-Oriented Development (TOD)

Transit-Oriented Development is an approach to focus development near rapid transit to create walkable, compact, mixed-use communities and reduce private vehicle use (TransLink, 2012; van Lierop, Maat, & El-Geneidy, 2017). TOD has become a prominent planning and development strategy utilized by municipalities across North America (Rayle, 2015; van Lierop, Maat, & El-Geneidy, 2017). Municipalities are realizing the auto-centric development that produced sprawling communities is not sustainable from an environmental, economic and social perspective and are looking to TOD to address these interconnected issues (van Lierop, Maat, & El-Geneidy, 2017). Additionally, Dawkins and Moeckel (2016) propose that TOD has become a dominant planning approach as it cuts across political and ideological silos. Although TOD has the potential to address many issues facing municipalities today, it may contribute to growing affordability and equity challenges.

2.4 TOD, Gentrification and Displacement

Rapid transit is a significant component of TOD. Rapid transit includes commuter rail, heavy rail (e.g. subway), light rail (e.g. tram or streetcar) and bus rapid transit (Higgins & Kanaroglou, 2016). Much of the research to date has focused on the impact of rapid transit on land values. Early review articles determined that proximity to rapid transit increases land values (Debrezion, et al., 2007; Ryan, 1999). This would indicate areas around rapid transit (i.e. stations) are expected to have higher land values. However, a recent comprehensive review paper determined that proximity to rapid transit alone does not explain the entire relationship. Higgins and Kanaroglou (2016) reviewed 60 studies, including 137 different analyses from 40 years of research and concluded that the research to date on rapid transit and land values has yielded conflicting results. They provided three recommendations for future research: a need for more comprehensive evaluation of rapid transit access, more consideration for variables such as TOD and enhanced methods. While the review's findings complicate the understanding of the transit-land value relationship, the recommendations highlight the significant impact TOD has on property values. The authors state that TOD and supporting policies such as mixed-use zoning "can have a significant effect on land values in addition to, or even potentially irrespective of transit accessibility" (Higgins & Kanaroglou, 2016, p. 622).

Bartholomew and Ewing (2011) provide additional evidence to support the impact of TOD on land values. The authors analyzed previously published studies and determined there is a growing demand for TOD, which is increasing land values. Pollack et al. (2010) completed an analysis of 42 neighbourhoods surrounding new rapid transit stations between 1990 and 2000 and identified indicators of gentrification such as increased housing costs and incomes in the majority of cases. As well, Zuk and Carlton (2015) determined that neighbourhoods surrounding transit stations are more prone to gentrification. This growing body of evidence suggests that "gentrification is a likely—if not foregone—consequence of TOD initiatives" (Rayle, 2015, p. 536).

Recent Canadian studies provide additional evidence of TOD, gentrification and transit-related housing affordability issues. Grube-Cavers and Patterson (2015) analyzed census tracts in Vancouver, Toronto and Montreal and found a significant relationship between gentrifying areas and the proximity to rapid transit and adjacent gentrifying areas in two of the three cities. This finding led the authors to recommend the need to better coordinate transportation and land use planning, and to provide affordable housing options in transit-served areas. Jones (2015) analyzed neighbourhood change along the SkyTrain corridor in Burnaby and revealed a loss of affordable rental stock due to policies that promote TOD. Jones (2015) also provides evidence of gentrification along the transit corridor and evidence of exclusionary and social displacement.

The TOD—gentrification relationship can partially be explained through increased demand as Bartholomew and Ewing (2011) stated. TOD can also increase land values as it often coincides with urban design amenities (Bartholomew & Ewing, 2011; Rayle, 2015). In addition, TODs are difficult and expensive undertakings. Researchers suggest new developments within TODs are often high-end developments as developers seek to recoup increased land and development costs (Haughey & Sherriff, 2010; Pendall, R., Gainsborough, J., Lowe, K., & Nguyen, M., 2012).

Gentrification resulting from TOD can have three primary negative consequences. First, Pollack et al. (2010) provides evidence that new TOD residents have higher incomes, own more vehicles and use transit less frequently. This outcome serves to reduce the effectiveness of TOD as the intent is to create compact mixed-use communities and increase the transit mode-share. Second, the process of gentrification can lead to displacement and as previously discussed, the multiple dimensions of displacement can negatively impact low- and moderate-income households. Thus, the TOD—gentrification relationship could reduce access to high quality transit for those households that would derive the greatest benefit (Debrezion et al., 2007; van Lierop, Maat, & El-Geneidy, 2017). Rayle (2015) suggests that low- and moderate-income residents in TOD communities may be able to offset increased housing costs by reducing transportation expenses, and that improved access to transit may provide better access to employment opportunities and in turn increase wages. However, the author also indicates that more research is required in this area. Third, researchers suggest that investments in rapid transit and TOD can reduce transit service in other areas of the municipality due to funding constraints (Pendall et al., 2012; Lung-Amam, W., Pendall, R., Scott, M., & Knaap, E., 2014). This reduction in service elsewhere can negatively impact low- and moderate-income households outside of the rapid transit corridor or TOD neighbourhoods.

The literature suggests there is a fairly clear link between TOD and gentrification. There is less clarity, however, between gentrification and displacement. While no known study has measured direct displacement from TOD, recent Canadian research does provide evidence of exclusionary and social displacement (Jones, 2015).

2.5 Equitable TOD

Equitable TOD is one approach that could help address issues around housing affordability, TOD, gentrification and potential displacement. Equitable TOD builds on TOD principles by seeking to address housing affordability as part of the development. Equitable TOD is defined as “compact, often mixed-use development with multi-modal access to jobs, neighborhood-serving stores and other amenities that also serves the needs of low- and moderate-income people” (Hersey & Spotts, 2015).

The concept of equitable TOD has evolved from the mid 2000's. American think tanks, philanthropic agencies and academic research centres have generated nearly all the literature in this area. Early literature on the concept focused on mixed-income near transit, mixed-income in transit rich neighbourhoods, mixed-income TOD and diverse TOD (CTOD 2006a, 2009; Pollack et al., 2010). More recent publications appear to have collapsed these concepts into the term equitable TOD (Hersey & Spotts, 2015; Pollack & Prater, 2013; Zuk & Carlton, 2015). Regardless of terminology (e.g. mixed-income, diverse or equitable TOD), the focus has remained on integrating affordability into TOD to improve housing options and provide access to high quality rapid transit to low- and moderate-income households. There has been considerable research on equitable TOD in the United States, yet little has been done in Canada. This project aims to help fill this gap.

Bayers-Westwood Public Housing Project

3. Policy Context

The provision of affordable housing spans federal, provincial and municipal jurisdiction (Hulchanski, 2007). As such, affordable rental housing policy is complex. The intent here is to provide the broad context for the legislative, policy and funding framework that guides the creation and preservation of affordable rental housing from the national to the local level. In a general sense, the federal government primarily finances market and non-market affordable housing, the provincial government finances, owns and operates non-market housing and facilitates municipal actions, while HRM can encourage, incentivize and regulate affordable housing (both market and non-market) primarily through land use policies, fee waiving, tax exemption and surplus land.

3.1 Federal Government

The *National Housing Act* and the *Canadian Mortgage and Housing Corporation Act* establish the federal government's housing role (Government of Canada, 1985a, 1985b). This legislation enables the federal government to finance housing and promote affordability (Government of Canada, 1985a). CMHC, a federal crown corporation is tasked with administering this legislation. CMHC's mandate is to "facilitate access to housing and contribute to financial stability in order to help Canadians meet their housing needs" (CMHC, 2017b). To achieve this, the organization provides mortgage insurance to reduce the barriers to homeownership, supports First Nation housing, undertakes research and delivers affordable housing programming (CMHC, 2017b).

The federal government supports the creation of both market and non-market housing and the preservation of existing non-market housing. However, support for affordable housing, primarily non-market, has varied significantly over the past 60 years (Hulchanski, 2007; Suttor, 2016). Suttor (2016) has compiled a comprehensive history of the federal government's affordable housing policies. He concludes that "Canada's social housing system today is essentially the product of three elements in the policy history: the legacy of the 1965-1995 programs in terms of funding, housing stock, and program structures; devolution and retrenchment in the 1990s; and the modest post-2001 reengagement" (Suttor, 2016, p. 1).

Recently, CMHC received a stronger affordable housing mandate from the Liberal government with the announcement of a National Housing Strategy. This announcement has also been accompanied by new programs and funding to support both market and non-market rental housing (CMHC, 2017c). Yet, Hulchanski (2017) indicates that few units have been created through the new CMHC programs and that the funding announcement is "smoke and mirrors."

3.2 Nova Scotia Provincial Government

The provincial government's role in affordable rental housing is established through the *Housing Nova Scotia Act* and the *Housing Act* (Government of Nova Scotia, 1989a, 1989b). The *Housing Nova*

Scotia Act primarily establishes the powers of Housing Nova Scotia, the provincial government crown corporation mandated to deliver affordable housing programming. The *Housing Act* facilitates the establishment of affordable housing projects or funding agreements between the federal and provincial government and between the provincial government and municipalities, organizations and individuals (Government of Nova Scotia, 1989b). Collectively, these acts enable Housing Nova Scotia to construct, own, maintain, acquire and provide housing for low-income and other vulnerable segments of the population (Government of Nova Scotia, 1989a, 1989b).

Housing Nova Scotia oversees the operation of five housing authorities across the province that act as property managers for the approximate 12,600 provincially-owned units (Housing Nova Scotia, 2017a). These units are referred to as "public housing" and are characterized as non-market within the housing continuum. The Metropolitan Regional Housing Authority is responsible for these activities within HRM (Housing Nova Scotia, 2017b). Housing Nova Scotia also facilitates federal-provincial funding agreements that support non-profit, co-operative and social housing units and delivers direct programming to support the creation and preservation of non-market units (SHS Consulting, 2015).

A provincial housing strategy was created in 2013 to guide these efforts. The strategy marked the creation of Housing Nova Scotia (formerly the Nova Scotia Housing Development Corporation, which was created in 1986) and committed $500 million towards "building new, vibrant communities, revitalizing existing neighbourhoods and offering affordable new housing choices for Nova Scotia families" (Government of Nova Scotia, 2013, p. 13). The strategy establishes a commitment to affordable rental housing and new strategic directions including a focus on mixed-income housing projects and a housing first approach to tackle homelessness (Government of Nova Scotia, 2013). However, the strategy fails to detail how the financial investment will be allocated. In addition, Thomas (2017), has suggested that implementation has been hindered due to the transition in government leadership since its adoption.

The provincial government also influences the role of HRM through the *Halifax Regional Municipality Charter (HRM Charter)*. The *HRM Charter* delegates "broad authority" to Halifax and enables the Municipality to, among other items, provide services, undertake planning and regulate land use (Government of Nova Scotia, 2008). The province has also established *Statements of Provincial Interest* through the enabling municipal legislation (Government of Nova Scotia, 1998; 2008). The *Statements of Provincial Interest* are designed to guide development and land use planning. These statements require both the provincial and municipal governments to act in a way that is "reasonably consistent" with them (Government of Nova Scotia, 1998, p. 285). The provision of "housing opportunities to meet the needs of all Nova Scotians" is one of the six statements (Government of Nova Scotia, 1998, p. 291). This establishes the role of municipal government in the provision of affordable housing as it requires municipalities to address affordable housing in planning documents (Government of Nova Scotia, 1998). However, the definition of affordable housing is left to municipalities.

Lastly, a *Municipal Housing Corporations Act* was established in 1989 that enables municipalities to create a housing corporation. These corporations can build and operate housing but for a specific segment of the population which requires assistance (e.g. seniors or those with mental or physical disabilities) (Government of Nova Scotia, 1989c). No known corporation has been established by HRM, but the former cities of Halifax and Dartmouth both operated housing corporations prior to amalgamation.

3.3 Halifax Regional Municipality

The provision of social housing (i.e. non-market) in HRM is dictated by the 1996 Provincial - Municipal Service Exchange Agreement (HRM, 2016b). This agreement transferred the sole responsibility of social housing to the province. As part of this agreement, the Municipality provides mandatory payments to the province to support the operation of the Metropolitan Regional Housing Authority (HRM, 2017d). As such, HRM has had limited involvement in social housing until recently (SHS Consulting, 2015).

HRM is primarily involved in the preservation and creation of affordable rental housing through municipal planning strategies and the regulation of development through land use by-laws. The Municipality's 2014 Regional Municipal Planning Strategy (2014 Regional Plan) establishes a commitment to affordable housing. While the 2014 Regional Plan establishes a number of strategies to support the creation and preservation of affordable housing, it does so while recognizing the province's lead role in delivering social housing (HRM, 2014). The 2014 Regional Plan does, however, provide direction to consider affordable housing through its secondary municipal planning strategies and seeks to deliver affordable housing through collaboration, municipal operations and funding decisions.

The Municipality's involvement in the Housing and Homelessness Partnership is one example of this focus on collaboration. The Housing and Homelessness Partnership is a group of nine organizations that are working towards eliminating homelessness and housing poverty (Housing and Homelessness Partnership, 2015). These organizations include CMHC, Housing Nova Scotia, Nova Scotia Department of Community Services, Nova Scotia Health Authority, IWK Health Centre, HRM, Investment Property Owners Association of Nova Scotia, Affordable Housing Association Nova Scotia and the United Way.

HRM municipal plans, strategies and initiatives and the Housing and Homelessness Partnership are explored in more detail in the findings section.

3.4 Affordable Rental Housing Funding Framework

Figure 5 provides a schematic of the funding framework for affordable rental housing within the context of federal, provincial and municipal roles and actions. The schematic is intended to provide an overview of the variety of funding programs, sources, intent and linkages. These programs span the housing continuum. Programs that can be accessed by the province, HRM or individual groups are included in separate streams which results in some duplication. The funding programs are colour coded to indicate programs that support affordable rental housing preservation, creation or both. A table with details on the programs is provided in Appendix A.

3.4.1 Federal Funding

The federal government currently provides a number of programs that support both market and non-market housing. There are multiple funding agreements established with the province of Nova Scotia that support the creation of new non-market rental housing as well as preserving the existing housing stock. The federal government can also establish agreements directly with municipalities, non-profits, co-operatives, aboriginal housing groups and individuals.

The programs depicted in Figure 5 are primarily geared towards:

- Supporting existing units established prior to the mid-1990s;
- Supporting new non-market rentals;
- Financing new construction and refinancing existing market units; and
- Driving innovation and identifying new approaches to reduce government funding.

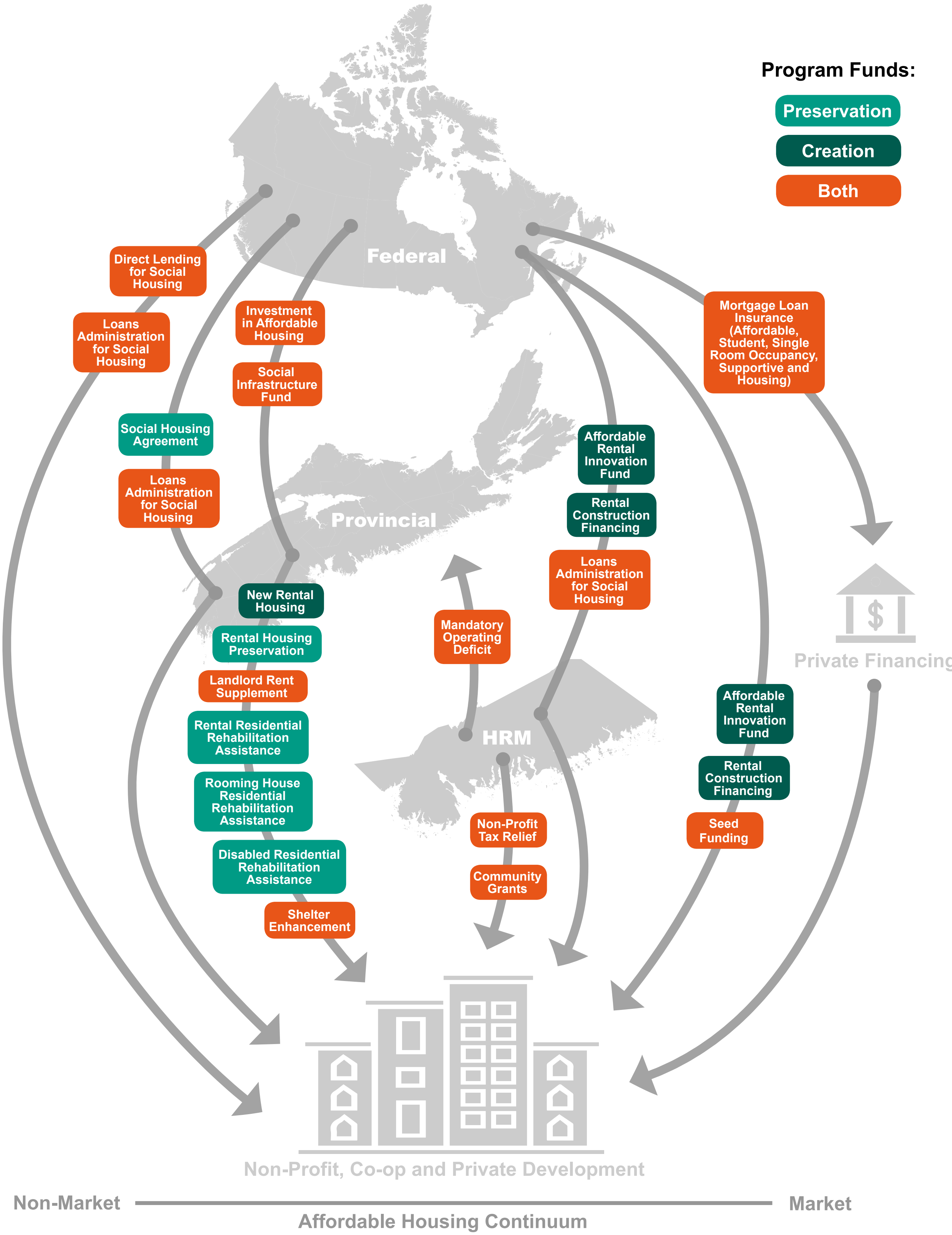
3.4.2 Provincial Funding

Housing Nova Scotia states that the majority of its work is “tied to bilateral federal/ provincial housing funding agreements” (Housing Nova Scotia, 2017c, p. 2). There are three main housing agreements: the Social Housing Agreement, the Investment in Affordable Housing and the Social Infrastructure Fund. The province uses these funds to facilitate support for the existing social housing stock and deliver seven programs that support the creation and preservation of non-market rentals. The majority of the provincial housing programs secure affordability for 15 year periods, while others state that affordability must be maintained but do not specify a time period.

3.4.3 HRM Funding

HRM provides some financial support for affordable rental housing. As previously noted, HRM makes a mandatory contribution to the provincial government as required by the 1996 Provincial - Municipal Service Exchange Agreement. The amount budgeted for 2017 is $3.5 million (HRM, 2016b, 2017d). The Municipality offers tax relief to non-profits and small community grants that support capital projects. The Non-Profit Tax Relief Program can reduce the tax rate or provide a tax exemption on an annual basis for non-profits that operate emergency shelters, supportive housing or affordable housing which is defined as independent living with below market rents (HRM, 2017g, 2017h).

Figure 5. Affordable Rental Housing Funding Framework



Additionally, the Community Grants Program can provide grants of $25,000 for shelters, temporary housing, transitional housing and supportive and independent affordable housing (HRM, 2017i). HRM can also access some of the CMHC programs directly. However, this does not appear to have been used to fund any developments.

3.4.4 Non-profits, Co-ops, Landlords and Private Developers

Collectively, these funding programs are used by non-profits, co-operatives, landlords and private developers to support the preservation or creation of affordable rental units. Housing Nova Scotia indicates that non-profits and co-operatives are primarily accessing programs to preserve existing rentals, while private developers are accessing programs to create new affordable rentals (D. Espeseth, personal communications with policy maker, October 11, 2017).

3.4.5 Energy Efficiency Programs

Programs that seek to reduce energy expenditures can also make a positive contribution towards housing affordability by reducing shelter costs. HRM delivers the Solar City program that assists property owners in financing the installation of solar energy systems (HRM, 2017j). Efficiency Nova Scotia, a public utility company also operates funding programs that support increasing energy efficiency in rental housing and includes programs specific to non-market rentals (Efficiency Nova Scotia 2017a, 2017b). These programs are not captured in the schematic but they do support the development and maintenance of rental housing affordability.

Census data provided by Statistics Canada, primary rental market data provided by CMHC and provincial land ownership data acquired through the Dalhousie GIS Centre is presented here. The intent of the characterization is to provide an understanding of the existing community and inform the recommendations in the development of the Joseph Howe Future Growth Node.

The characterization is provided at the census tract (CT) level as CTs are used as a proxy for neighbourhoods (Grube-Cavers & Patterson, 2015). An 800 metre buffer around an approximate centroid is used to estimate the TOD capture zone. This buffer represents the distance the average person will walk to a station and is consistent with previous research (Revington & Townsend, 2016). The buffer intersected four CTs. One CT was removed as there was little current and potential residential development in this area. Figure 6 depicts the CTs captured in the characterization.

Population, income and housing census data presented is based on household characteristics that are more likely to face affordability challenges as identified in the Halifax Housing Needs Assessment (SHS Consulting, 2015). CMHC median rents and vacancy rates are also presented. Data is provided for each CT, the Regional Centre and HRM. The data for the Regional Centre is estimated by CTs as the boundaries do not align.

Figure 6. Joseph Howe Future Growth Node Census Tracts (Espeseth, 2017b)

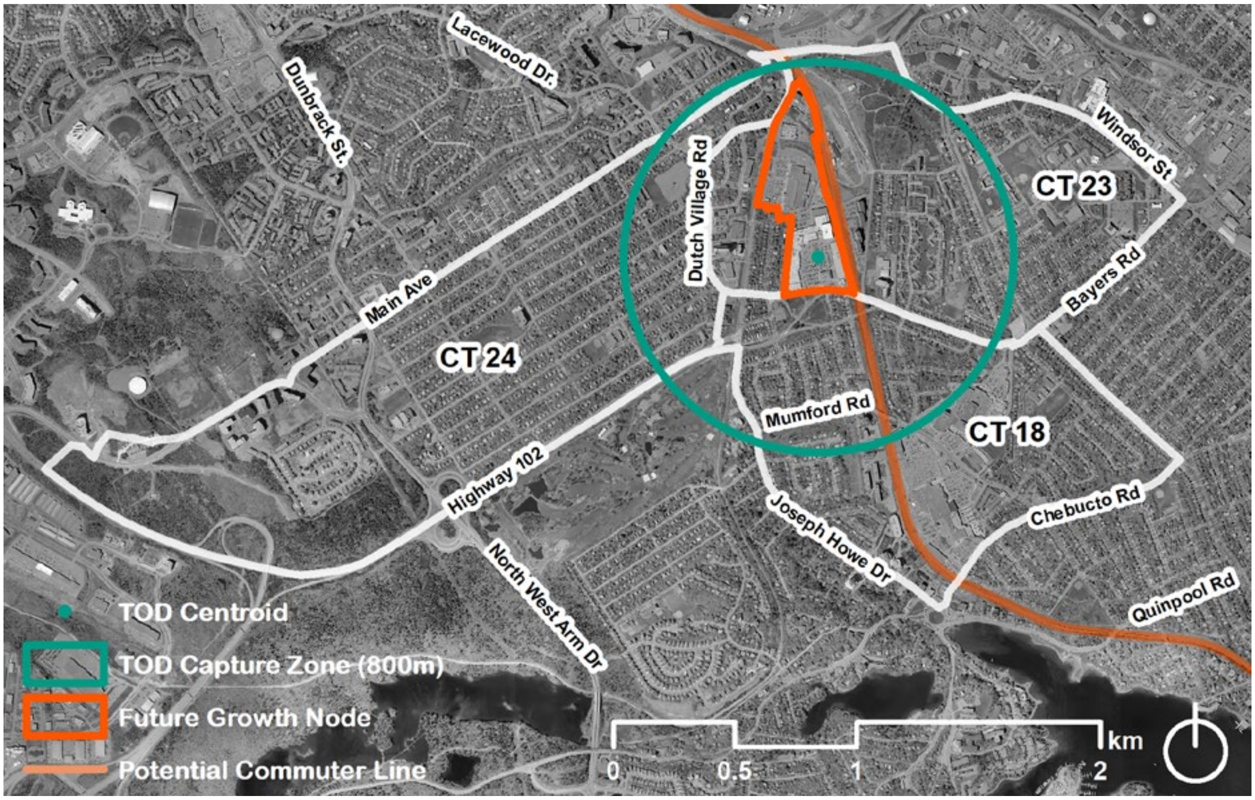


Figure 7 represents an indexed population change between 2001 and 2016 for HRM, Regional Center and the three CTs. The population of CTs 23 and 24 have increased at a faster rate than HRM or the Regional Centre, while CT 18 has continually dropped. Median household income has increased at a steady rate for HRM, Regional Centre and two of the three CTs (18 and 24), as demonstrated in Figure 8. However, there is a large income gap between HRM and these other areas that have not changed much over the last 10 years. Median income in CT 23 increased by 45% over the last five years and is now more comparable to the other CTs.

Figure 7. Total Population and Population Change (Canadian Census Analyser, 2017a, 2017b, 2017c)

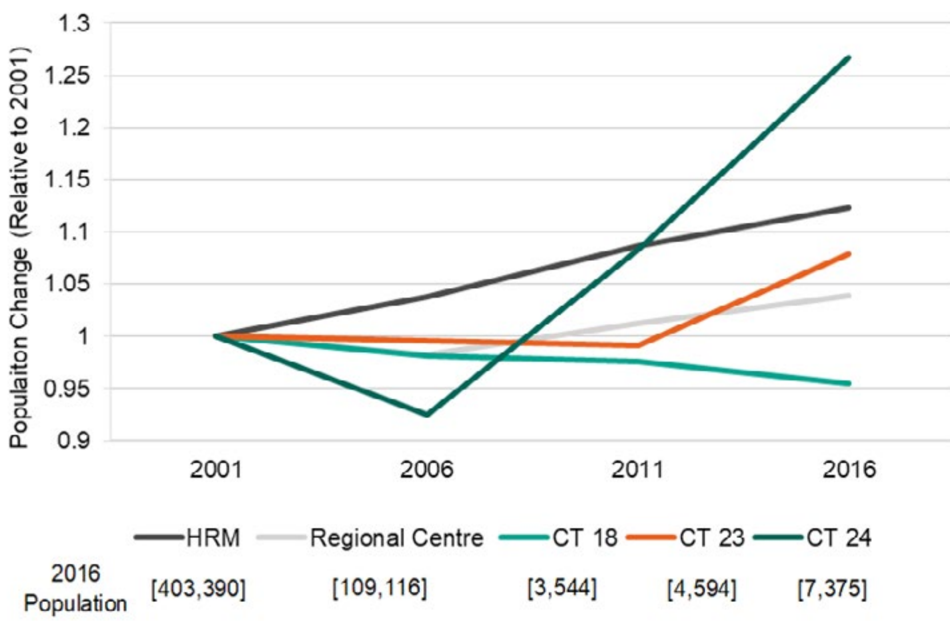
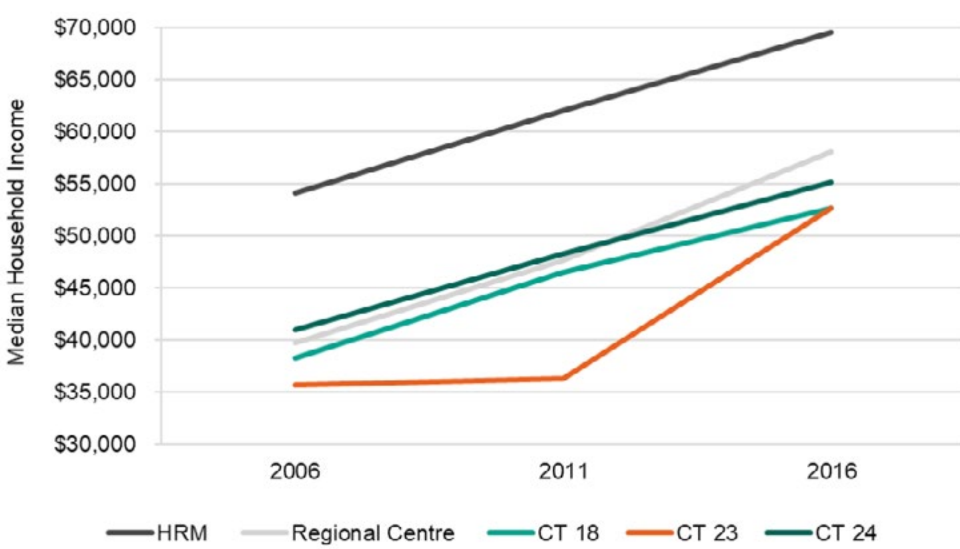


Figure 8. Change in Median Household Income (Canadian Census Analyser, 2017a, 2017b, 2017c)



There is also a substantially greater percentage of lower income individuals in CT 23 than the other two CTs (see Figure 9). The percentage of renters for two of the three CTs is comparable to the Regional Centre, while CT 23 exhibits a greater percentage of renters (see Figure 9). However, despite having a higher median income, CT 18 has a high percentage of renter households exceeding the 30% affordability threshold, while the other two CTs are comparable to the Regional Centre. In CT 23 this may be partially explained by the high percentage of renter households in subsidized housing. CT 18 has a higher percentage of one-person households, while CT 23 has a higher percentage of individuals who identify as Aboriginal and recent immigrants (see Figure 10). CT 23 and 24 also have high percentages of single parent households. Other characteristics are comparable to, or lower than rates in the Regional Centre.

Figure 9. Low-Income and Renter Characteristics (Canadian Census Analyser, 2017c)

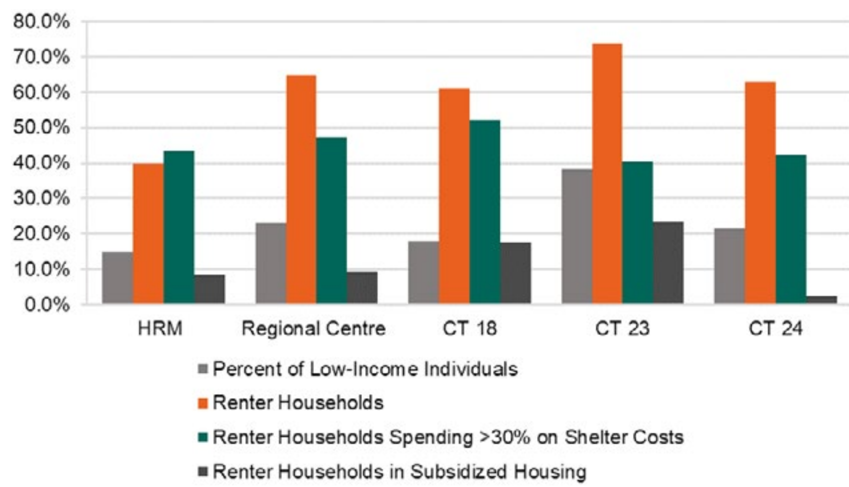


Figure 10. Household Characteristics (Canadian Census Analyser, 2017c)

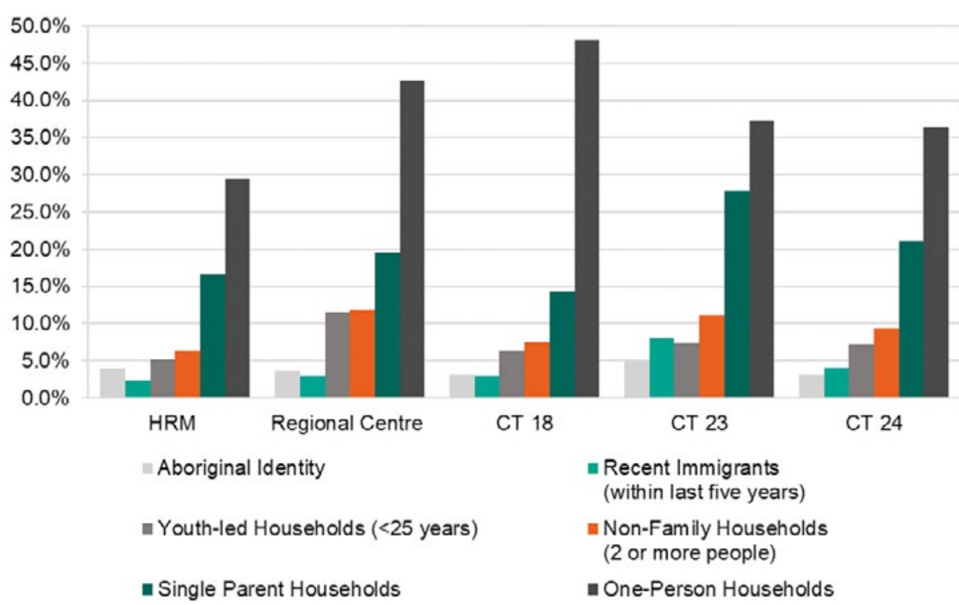


Figure 11 provides a comparison of median rents and vacancy rates for all rental types in HRM, Regional Centre and three CTs. Median rent for two of the three CTs is higher than HRM and the Regional, while the 2016 median rent in CT 18 is just below the Regional Centre. Vacancy rates for HRM, Regional Centre and all three CTs have fluctuated between 1% to 4.4% over the last six years, with the exception of the 2014 peak of 5.6% in CT 24. Vacancy rates for CT 18 and 24 have declined over the last few years to the 2016 rates of 1.2% and 2.4% respectively, while the 2016 rate for CT 23 was 3.7%. The Halifax Housing Needs Assessment states that a rate of 3% is “generally accepted as a healthy vacancy rate” (SHS Consulting, 2015, p. 49). These rates indicate there is some shortage in CTs 18 and 24, however, the report also notes that survey respondents indicated that the condition and affordability of rental units was more of an issue than rental supply (SHS Consulting, 2015).

Figure 11. Median Rent and Vacancy Rates (CMHC, 2017d)

Figure 12. Joseph Howe Future Growth Node Property Ownership (Espeseth, 2017c)

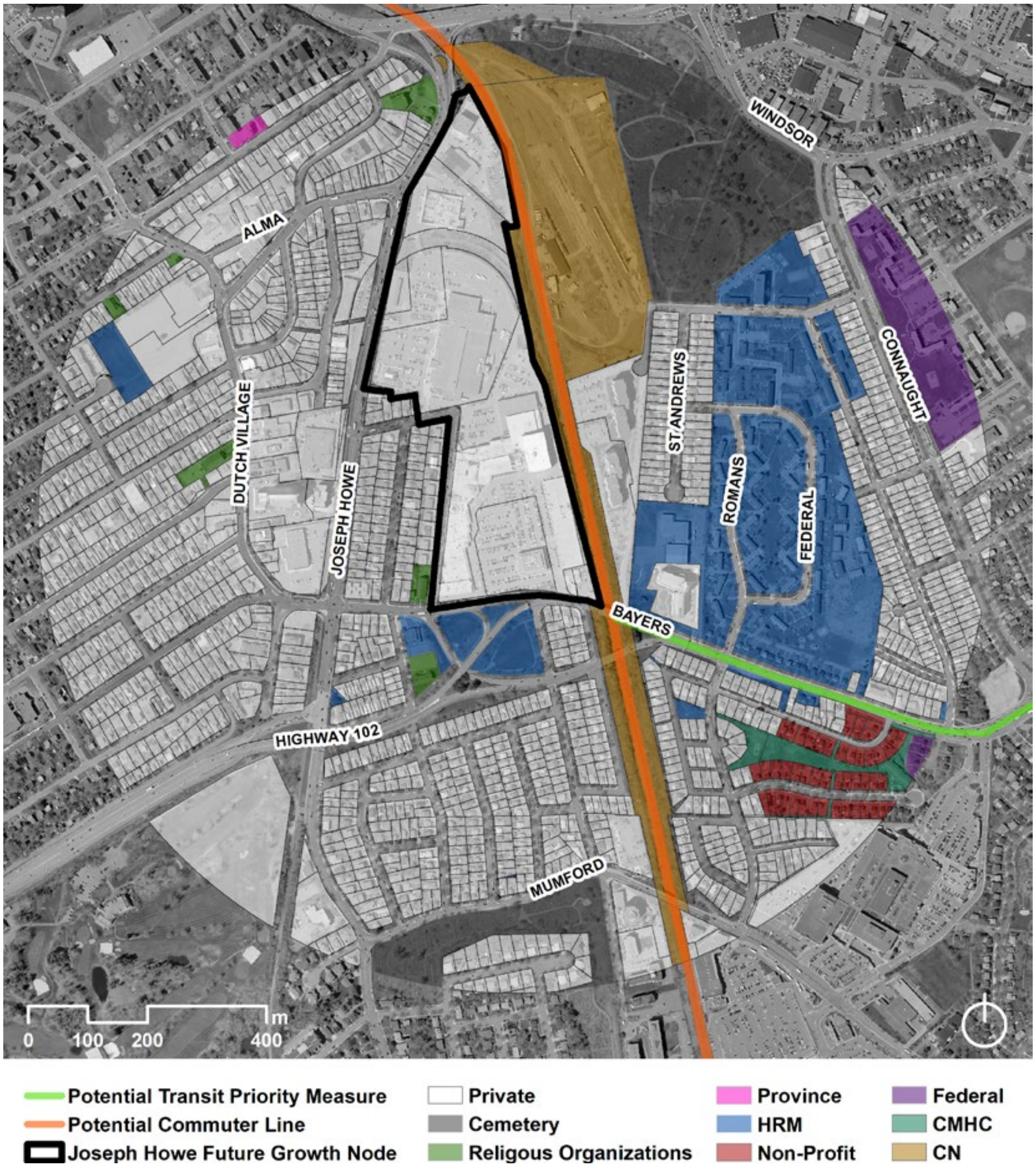


Figure 12 demonstrates there is a high proportion of publicly owned land and non-profit housing within the 800m buffer. Much of HRM owned land is dedicated to non-market housing north of Bayers Road. There are also individual provincial and non-profit housing units within the zone, but these are not displayed to maintain privacy.

Households in the area surrounding the Joseph Howe Future Growth Node indicate some vulnerability to neighborhood change and existing housing affordability concerns. However, given the existing non-market housing surrounding the Joseph Howe Future Growth Node, this area may be well positioned to realize equitable TOD if the existing units can be maintained.

5. Research Questions

Proponents of TOD promise the creation of more sustainable communities. TOD can address pressing issues facing municipalities such as public health, sprawl and climate change. While the potential benefits of TOD are numerous, housing affordability and equity issues may be exacerbated.

This project seeks to identify strategies to minimize gentrification and resident displacement in the potential development of the Joseph Howe Future Growth Node into a transit-oriented community.

The following questions guided this project:

- What are the best practices for achieving affordable rental housing in TODs?
- What affordable rental housing strategies and partnerships exist within HRM and how do they compare to the best practices?
- Are there any gaps? If so, are there any equitable TOD cases that address these gaps?
- What strategies and partnerships were established in the identified cases?
- What steps could HRM take to realize equitable TOD in the development of the Joseph Howe Future Growth Node?

Development along Dutch Village Road

6. Methods

The investigation methods for this project included a review of equitable TOD literature, an HRM policy review and an analysis of three equitable TOD cases.

A keyword search using the Novanet academic database, Google Scholar and Google's search engine was used to source equitable TOD, mixed-income TOD and diverse TOD literature. Literature from these related topics was grouped, as equitable TOD is a recent concept. Ten documents published between 2006 and 2015 were reviewed to determine equitable TOD best practices. Prominent themes were identified and refined through an iterative process. Initially, preliminary themes were identified for each document based on reported challenges, recommendations, strategies or specific policy tools. These preliminary themes were further refined through a comparative review which allowed for the grouping of similar ideas.

The best practice literature often included equitable TOD case studies or case summaries. Therefore, the keyword search yielded potential cases studies for review and case summaries that informed case selection.

The policy review was used to identify affordable housing strategies and partnerships within HRM. The *HRM Charter*, 2014 Regional Plan, Draft Centre Plan, Draft Integrated Mobility Plan and the Moving Forward Together Plan as well as documents produced by the Housing and Homelessness Partnership were reviewed. Additional information was sourced from HRM staff reports and Regional Council meeting minutes. The review was supported by discussions with affordable housing and planning professionals in Halifax. The equitable TOD best practice themes were then applied to the identified strategies and partnerships within HRM. This analysis identified a number of gaps. These gaps were used to guide the selection of equitable TOD cases.

The equitable TOD literature only produced 20 to 25 potential cases. As previously discussed, the research on equitable TOD is generated from the United States. Thus, the pool of potential cases was entirely American. Three equitable TOD cases were selected for review. Selection focused on those cases that provided insight into the identified gaps within HRM. Initially, the review focused on previously published cases. Additional primary sources were collected to supplement the published material.

Findings for each case were summarized and compared to identify any cross-case patterns. These findings were then evaluated to provide recommendations for the consideration of equitable TOD within HRM.

7. Findings

7.1 Equitable TOD Best Practices

Four equitable TOD best practice themes were identified. These include planning and coordination, land access and acquisition, incentives and regulations, and financial tools and programs. Table 2 presents the themes and specific best practice examples. The table is not intended to capture every practice or tool, but rather provide examples of those that are frequently referenced and represent common approaches utilized under each theme.

The themes provide a framework for conceptualizing the components of an effective equitable TOD approach. The categories are quite fluid in practice. For example, tax exemptions can be considered both a financial tool and an incentive. The incentives and regulations theme is primarily focused on tools that can be utilized by a planning department, whereas tax exemptions do not typically fall within the purview of a planning department. Additionally, a TOD fund could be considered a financial tool as it provides access to capital, but as the intent of these funds is to secure land it is more appropriately placed in the land access and acquisition category. Lastly, planning and coordination is embedded within each theme. However, planning and coordination is a prominent theme in the literature and therefore warranted its own category.

Table 2. Best Practice Themes and Examples

Best Practice Themes:	Planning and Coordination	Land Access and Acquisition	Incentives and Regulations	Financial Tools and Programs
Example Best Practices	• Land-use, affordable housing and transportation planning coordination • Inter-agency coordination • Community engagement	• Housing trusts • TOD fund • Utilization of public lands	• Streamlined project approvals • Reduced regulatory requirements (e.g. parking) • Density bonusing • Inclusionary zoning	• Modifying existing funding programs to target TOD areas • Tax increment financing • Tax reductions or exemptions

Sources: CTOD, 2006a, 2006b, 2007, 2008, 2009; Hersey & Spotts, 2015; Pendall et al., 2012; Pollack et al., 2010; Wardrip, 2011; Zuk & Carlton, 2015

7.1.1 Planning and Coordination

Planning and coordination are identified as a challenge or recommendation in nearly every document reviewed. Equitable TOD often intersects with multiple jurisdictions, organizations and actors involved in land use planning, transportation, development and affordable housing. Individually, these are large and complex disciplines. Separately, these disciplines can act as opposing forces. Therefore, delivering equitable TOD successfully requires support and coordination of efforts on many fronts. Establishing plans and strategies that seek to address these disciplines in an integrated manner is essential.

Effective community engagement is another critical factor. Equitable TOD generally involves increasing residential density and developing affordable housing. Community opposition to density and affordable housing developments can be particularly challenging (CTOD, 2007, 2009; Zuk & Carlton, 2015). Conversely, new investments such as TOD can generate concerns of gentrification and housing affordability for existing low- and moderate-income residents. This concern has led some neighbourhoods to oppose transit investments and TOD (Pendall et al., 2012). Undertaking community engagement early in the development stages can help address both issues.

7.1.2 Land Access and Acquisition

Providing access to land for affordable developments or acquiring land early in the development process is another prominent theme. Research has demonstrated land values around TOD can rise during the planning stages and even more dramatically after the stations open and transit service begins (Wardrip, 2011). The provision of affordable housing becomes even more challenging as land values rise.

Housing trust funds, TOD funds and the use of public lands are three practices that can help address this issue. Housing trust funds use dedicated funding from governments or other sources to support the acquisition of land for affordable housing developments or purchase existing properties to preserve affordability (Pollack et al., 2010). A TOD fund is a more specific form of a housing trust fund which supports land or property acquisition near transit stations (Hersey & Spotts, 2015; Pollack et al., 2010). The use of public lands is another strategy that can help address the challenge of rising land values. Federal, state/provincial, regional or municipal governments can sell or lease land to support affordable housing developments (Hersey & Spotts, 2015).

7.1.3 Incentives and Regulations

Both TOD and affordable housing developments are complex undertakings that generally require resource commitments from private and public sources. Providing incentives or reducing regulatory requirements can help alleviate some of the costs and financial risk.

Policies such as density bonusing can incentivize the creation of new affordable units. Density bonusing allows greater density in exchange for community benefits such as affordable housing (CTOD, 2007). Reducing or waiving development fees is another way to incentivize affordable housing developments. Reducing regulatory barriers such as parking requirements, project approval times and increasing allowable density and housing types can also reduce project costs (CTOD, 2006a, 2007). Conversely, new regulations can serve to create new units. Policies such as inclusionary zoning or incentive zoning can require a percentage of new developments dedicated to affordable housing or generate payments in lieu of producing affordable housing (CTOD, 2009; Pollack et al., 2010).

7.1.4 Financial Tools and Programs

Financing from all levels of governments is a core component of equitable TOD. The literature includes recommendations for maintaining funding to preserve existing units within TOD areas as well as modifying existing funding programs to allow for more coordination between housing and transit projects (CTOD, 2006a; Hersey & Spotts, 2015). Reducing or eliminating the tax burden is another way to encourage affordable housing creation and preservation as it can reduce property maintenance or development costs (CTOD, 2007; Hersey & Spotts, 2015).

Tax increment financing (TIF) is a more complex financial tool that can be used to support equitable TOD (Hersey & Spotts, 2015; Pollack et al. 2010; Wardrip, 2011). TIF relies on increases in property tax revenues in a specific geographic extent over a set number of years to support infrastructure, or in this case affordable housing (Peterson, 2014). Tax revenues are capped at a base year. Tax revenues up to that base level support general revenue, while anything above the base supports the intended project for the duration of the TIF.

7.2 Halifax Regional Municipality Policy Review

Municipal plans, strategic plans, reports and HRM Regional Council meeting minutes were reviewed to evaluate the alignment between affordable housing and transit policy directions as well as specific policy tools and partnerships that could support equitable TOD within HRM. A brief analysis of each document is provided here. The findings are then compared to the equitable TOD best practices themes. The analysis is followed by a discussion of each theme within HRM context and the identification of any gaps.

7.2.1 HRM Charter

The *HRM Charter* provides HRM with broad powers to govern the Municipality. The *HRM Charter* enables HRM to expend money and largely determines what types of planning incentives, regulations and policy tools the Municipality can utilize (Government of Nova Scotia, 2008). As per the *HRM Charter*, the Municipality is able to:

- Provide property tax relief to non-profits - section 89;
- Provide grants to community groups - section 79(v);
- Sell or lease property at a price less than market value to non-profits - section 63(1);

- Utilize density bonusing within the Centre Plan area - section 235(5)(k);
- Provide financing for energy-efficiency programs - section 79(ada); and
- Enter into agreements and expend money to carry out agreements with CMHC to facilitate projects consistent with the *National Housing Act* or any corporate body or agency having similar objects to CMHC with respect to projects pursuant to the National Housing Act - sections 73(b) and 79(at).

The *HRM Charter* enables some strategies and policy tools that could support equitable TOD.

7.2.2 Natural Person Powers

HRM is seeking approval from the province to enable the use of natural person powers (HRM, 2017e). Natural person powers would restructure the *HRM Charter* and enable the Municipality to expend money in the same way an individual can (HRM, 2017f).

These expanded powers would greatly reshape HRM's ability to raise and expend money and would likely yield significant benefits for the provision of affordable housing (HRM, 2017e).

7.2.3 Regional Plan

The 2014 Regional Plan establishes the overarching direction for the Municipality. The plan provides a commitment to housing affordability through policies S-30 to S-34. These policies provide direction to consider housing affordability through secondary municipal planning strategies and seek to deliver affordable housing through municipal operations, funding decisions and building collaborative partnerships (HRM, 2014). Specific strategies include:

- Focusing growth in areas near transit;
- Reducing requirements on development (e.g. lot size, parking spaces);
- Allowing greater density;
- Allowing greater diversity in housing types;
- Considering support for provincial affordable housing initiatives or funding programs;
- Considering partnering or providing financial support to housing organizations;
- Determining housing needs and monitor trends; and
- Investigating other ways to support affordable housing such as reducing or removing fees for development (HRM, 2014, p. 57-8).

The 2014 Regional Plan also commits to maximizing access to public transit through mixed-use developments (policy T-9) and generally seeks to integrate land use and public transit by focusing development in "growth centres" and "corridors" (HRM, 2014).

The 2014 Regional Plan provides direction on strategies to address affordable housing and focuses on the integration of housing and land use. The plan provides a framework to work towards delivering equitable TOD.

7.2.4 Centre Plan (Draft)

The Centre Plan will create a new secondary municipal planning strategy to guide development and growth in Halifax and Dartmouth within the Circumferential Highway. One of the plan's primary objectives is to intensify development within the Regional Centre (HRM, 2017a). Housing and mobility form two of the seven themes in the plan. The housing theme includes consideration for affordability while the mobility theme includes some discussion of transit. The plan establishes an objective to increase the number of affordable housing units and describes a range of policy tools that HRM may utilize to support development. These tools primarily include reduced lot size, secondary dwelling units, a variety of housing forms, land trusts, density bonusing and inclusionary zoning (HRM, 2017a).

The plan establishes a goal to integrate land use and mobility and discusses the use of TOD and rail corridors. The plan also establishes a commitment to affordable housing and identifies a number of tools that can help deliver it. However, there is little integration between affordable housing and transit policies and little discussion of affordable housing in the Future Growth Nodes which will be considering transit-oriented design (HRM, 2017a). Currently, only density bonusing is being considered in Future Growth Nodes.

7.2.5 Integrated Mobility Plan (Draft)

The Integrated Mobility Plan will serve to guide investment in transportation within HRM (HRM, 2016a). The draft materials establish eight topic areas which include: land use, complete streets, transportation demand management, active transportation, transit, goods movement, road network and parking. The land use component focuses on increasing density and integrating land use and transportation decision making.

The materials released to date provide direction to up-zone areas around transit terminals or stations and to complete station area plans. However, there is no consideration for affordable housing or the impact transit may have on affordability as of November 2017.

7.2.6 Moving Forward Together Plan

The Moving Forward Together Plan serves to guide Halifax Transit service improvements over the next 20 plus years (HRM, 2016c). The plan aims to improve service and make transit more desirable. However, there is a lack of integration with other plans, land use and housing in general.

7.2.7. Housing and Homelessness Partnership

The nine agency partnership was established in 2013 with the goal to end homelessness and housing poverty in Halifax. HRM is one of the nine partners. The partnership has two working groups, a Homelessness Working Group and an Affordable Housing Working Group. The Affordable Housing Working Group produced a Five Year Strategic Plan in 2015 which was followed by five year targets for affordable housing (Housing and Homelessness Partnership, 2015; 2016).

The strategic plan establishes three goals and 14 objectives. The goals seek to increase the supply of affordable housing, reduce core housing need and build capacity within the housing sector (Housing and Homelessness Partnership, 2015). To achieve these goals the strategic plan seeks to create new non-market housing, preserve existing, reduce development barriers, provide assistance to vulnerable residents and build collaborative partnerships across agencies (Housing and Homelessness Partnership, 2015).

The affordable housing targets are provided in Table 3. The targets seek to create new and preserve existing affordable units.

Table 3. Affordable Housing Working Group Five Year Targets (Housing and Homelessness Partnership, 2016)

Create 3,000 new affordable homes	• 1,000 new affordable social and non-market housing units • 1,000 new affordable private market rental units • 250 affordable homeownership housing units • 250 new rent supplements • 500 new secondary units
Preserve 2,000 existing affordable homes	• Increase in the number of licensed Single Room Occupancies • Reduce vacancy rates in key neighbourhoods

Regional Council adopted the five year targets in 2016, reinforcing the Municipality's commitment to affordable housing (HRM, 2016d). Regional Council also directed staff to "to develop an implementation framework to support the implementation of the Housing and Homelessness Partnership five-year affordable housing targets that fall within the Municipality's mandate" (HRM, 2016d, p. 4). This framework is currently under development.

The strategic plan outlines a comprehensive approach to tackle affordable housing and emphasizes coordination and collaboration. The targets are ambitious as HRM staff indicate few new affordable units have been created within HRM over the last 20 years (HRM, 2016b). The partnership is a substantial accomplishment and provides a multi-jurisdictional, multi-agency platform to tackle a concept such as equitable TOD. However, there is no discussion of the relationship between housing affordability and transit in the work to date.

7.2.8 Comparison of Halifax Regional Municipality Strategies and Partnerships

Table 4 depicts a comparison of the equitable TOD best practice themes with the findings from HRM policy review. A discussion of each theme within HRM context follows.

Table 4. Comparison of HRM to Equitable TOD Best Practice Themes

Best Practice Themes:	Planning and Coordination	Land Access and Acquisition	Incentives and Regulations	Financial Tools and Programs
HRM Practices	• Have adopted affordable housing targets • Participating in the Housing and Homelessness Partnership • Monitoring housing need and priority populations	• Can sell/lease land at less than market value to non-profits primarily through surplus lands designated as community interest	• Can utilize density bonusing (Centre Plan area) • Considering reduced development regulations (housing mix, parking, etc.) • Considering reduced development fees • Considering streamlined project approvals • Seeking approval for density bonusing and inclusionary zoning throughout HRM	• Can provide some tax relief options for non-profits • Can provide some grants to support community groups • Can provide financing for energy-efficiency programs • Seeking approval for natural person powers

Sources: Government of Nova Scotia, 2008; HRM, 2016b, 2016d, 2017a, 2017f

7.2.8.1 Planning and Coordination

HRM has made a broad commitment to affordable housing through its own plans and its involvement in the Housing and Homelessness Partnership. The Municipality has also established a policy direction to better integrate land use and transit. However, as evident in the policy review, there is currently little integration between affordable housing and transit policy directions.

7.2.8.2 Land Access and Acquisition

HRM has one tool that could provide access to public lands but there is no program that supports private land acquisition. The Municipality can sell or lease land at below market value but only to non-profit organizations through the Municipality's surplus land policy, Administrative Order 50 Respecting the Disposal of Surplus Real Property (HRM, 2015). This policy guides how the Municipality can "dispose" of land it no longer needs (i.e. surplus lands). Staff would first categorize the land as “Community Interest” if they determine there is a potential community use (HRM, n.d.). Non-profit organizations are then invited to submit proposals that would provide a benefit to the Municipality, but the benefit is vaguely defined (HRM, n.d.). While the program could provide land for affordable housing, the Community Interest category is only one of six potential categories and there is no requirement for HRM to consider lands for community interest first (HRM, 2015b).

7.2.8.3 Incentives and Regulations

HRM is considering the application of a wide range of planning tools to address affordable housing issues, primarily through the Centre Plan. These tools parallel many of the incentives and regulations discussed in the equitable TOD best practices. The introduction of these tools in the Centre Plan may eventually lead to their utilization in other parts of the Municipality. One indication of this progression is the fact the Municipality is seeking a *HRM Charter* amendment to expand the use of density bonusing and inclusionary zoning throughout the entire Municipality (HRM, 2016d).

7.2.8.4 Financial Tools and Programs

The federal and provincial governments are the principal funders for affordable housing. As demonstrated in Figure 5, there are multiple funding programs and funding relationships. At the federal level, there are two affordable rental housing programs that provide specific consideration for transit access in the evaluation criteria, the Affordable Rental Innovation Fund and the Rental Construction Financing program (CMHC, 2017e, 2017f). At the provincial level, Nova Scotia Housing indicates that access to transit is part of the evaluation criteria for projects among other considerations such as the financial viability of the project.

HRM has some capacity to provide financial support for affordable housing. However, this support is only available to non-profits through the Non-Profit Tax Relief Program and Community Grants Program. HRM’s recent request for natural person powers could dramatically change the Municipality’s ability to raise and utilized funds. These expanded powers could provide more support for affordable housing moving forward.

7.2.8.5 Summary

HRM has established a commitment to affordable housing and is considering multiple strategies that could support it through new incentives and regulations or actively reducing regulatory requirements in other cases. There is also a strong potential framework for coordinating multi-jurisdictional and multi-agency efforts through the Housing and Homelessness Partnership. Financial tools and programs are limited at the municipal level, but HRM is seeking natural person powers which may provide new opportunities.

Two areas that could be strengthened include planning and coordination and land access and acquisition. Existing and currently drafted plans lack integration between affordable housing and transit. As well, there is little policy support for providing public land for affordable housing and no support for private land acquisition. The land acquisition gap is significant as HRM is currently identifying key transit corridors and potential TOD sites. Three cases were selected to provide insight into strategies that could help address these gaps.

7.3 Equitable TOD Cases

Denver's West Corridor, Atlanta's BeltLine project and Boston's Fairmount/Indigo Corridor were selected as they provide insight into planning and coordination and land acquisition strategies (Hersey & Spotts, 2015; Pendall et al., 2012; Pollack et al., 2010). The equitable TOD literature is predominantly American, and since it is a relatively new topic area, yields a limited number of cases. As such, the cases selected for review are American cases. Each case begins with a discussion of the municipal context, relevant agencies and the history of the transit development. This is followed by the identification of factors that lead to the rise of equitable TOD and an inventory of the strategies and partnerships that support it. A brief discussion of the United States local government structure and affordable housing framework is first provided to assist in the understanding of the American context for equitable TOD.

The United States uses the term local government to capture a range of government organizations existing beneath state governments. General purpose local governments include counties, municipalities, townships and towns (National League of Cities, 2016a). Special purpose local governments include districts established to provide specific services such as school districts or utilities (National League of Cities, 2016a). Like Canada, state governments delegate powers to local governments either through the state constitution or legislation (National League of Cities, 2016a). Powers delegated to local government vary by state (National League of Cities, 2016b). In general, states delegate powers through Dillon Rule or Home Rule. Dillon Rule is more consistent with the current provincial/municipal relationship in Nova Scotia. Dillon Rule only allows local governments to exercise authority that the state has explicitly delegated (National League of Cities, 2016b). Conversely, Home Rule provides more autonomy to local governments and allows them to exercise authority that has not been explicitly delegated (Russell & Bostrom, 2016). However, states do generally restrict the Home Rule powers to certain areas (National League of Cities, 2016b). Some states subscribe solely to either Dillon Rule or Home Rule, while others utilize a combination of the two which varies by local government type (Russell & Bostrom, 2016). Counties are often delegated powers through state constitutions. Cities are typically granted powers through state legislation that establish charters.

Like Canada, affordable rental housing policy is influenced by all three levels of government. The United States federal government has traditionally served as the primary funder, but financial support has reduced in recent years (National Low Income Housing Coalition, 2017). The Low-Income Housing Tax Credit program is one of the primary federal funding initiatives (Kalugina, 2016). Low-Income Housing Tax Credits provides funds to each state which are used to support the creation or preservation of affordable units (Kalugina, 2016). Some states have used these tax credits to incentivize projects within TOD areas (Quigley, 2010). State and local governments have also developed separate rental support programs, trust funds and utilized planning regulations and incentives to address the reduction in federal support, but initiatives can vary widely by states (Kalugina, 2016; National Low Income Housing Coalition, 2015).

7.3.1 Denver West Corridor

7.3.1.1 Context

Denver has a consolidated city and county government which is similar to regional municipal amalgamations in Nova Scotia. The intent is to improve local government efficiency through service delivery and planning and coordination (National League of Cities, 2016c). The state of Colorado grants Home Rule powers to Denver and thus, the local government has autonomy to expend funds and explore innovative partnerships to support equitable TOD (Legislative Council Staff, 2016). Local governments within Colorado have also created separate housing agencies that have played a role in equitable TOD in the Denver area.

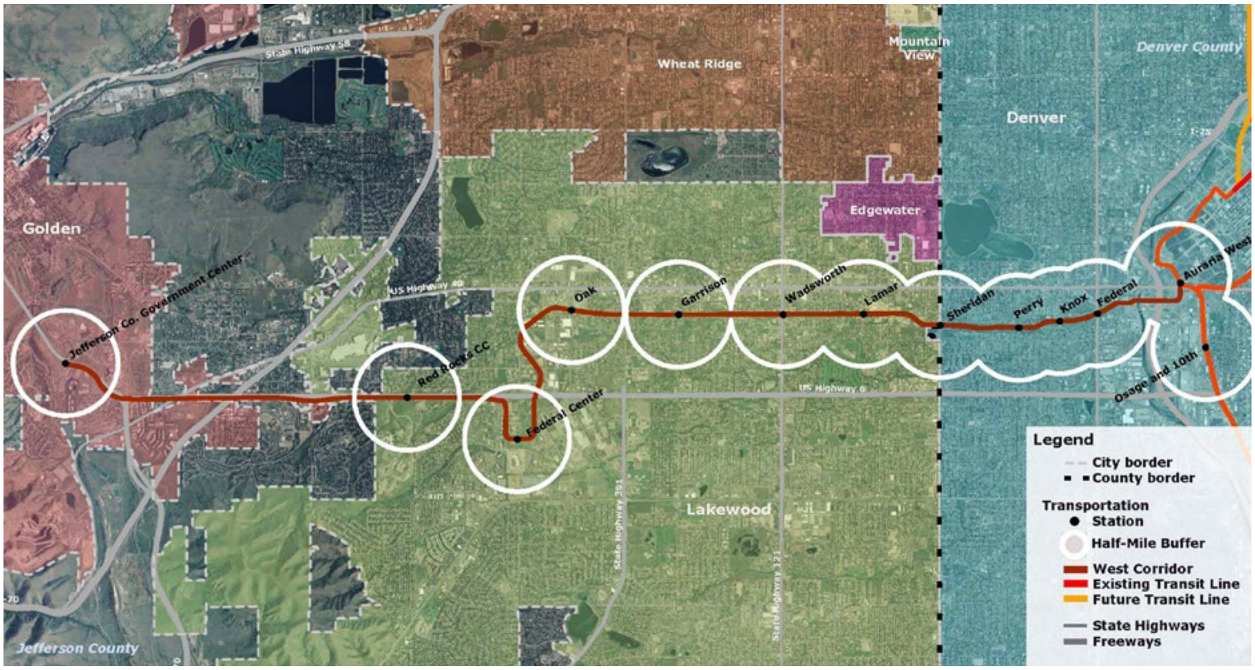
Transit is provided by the Regional Transportation District (RTD) which is a public transit agency. RTD service extends beyond the City and County of Denver to the entire metropolitan area. The RTD can raise funds for transit projects through public votes. In 2004, the voters approved the RTD's FasTracks plan to expand rapid transit service, including a new light rail line along the West Corridor (RTD, 2017). The corridor connects downtown Denver, the City of Lakewood and the City of Golden as depicted in Figure 13 (CTOD, 2007). The 12-mile transit line opened in 2013 and includes 11 new stations (RTD, 2017).

7.3.1.2 Rise of Equitable TOD

Housing affordability in areas well served by transit was identified as an issue in the early 2000s and thus the RDT FasTracks plan served to ignite several integrated housing and transportation initiatives (Padilla, 2010; Pendall et al. 2012). Three of the earliest initiatives included a TOD housing loan program, a TOD strategic plan and a study evaluating the need for mixed income TOD (CTOD, 2007).

The Metro Mayors Caucus, a voluntary organization formed by Mayors within the Denver metropolitan area, established a TOD loan pool in 2003 (Pendall et al. 2012). The Caucus, in partnership with the Colorado Housing and Finance Authority, the state housing corporation, created the loan program to support the renovation, acquisition or construction of affordable rental housing within 500 metres of rapid

Figure 13. Denver West Corridor (Reconnecting America, 2017)



transit stations (Metro Mayors Caucus, n.d.). Pendall et al. (2012) states the program provides $62 million USD annually, but that it has not been well used due to a lack of competitive interest rates.

The City and County of Denver completed the TOD Strategic Plan in 2006. The plan integrated TOD and housing affordability issues and provided several suggestions to address these issues (City and County of Denver, 2006). The primary approach included the creation of a mixed-income housing strategy for TOD. Concepts such as reduced parking requirements, inclusionary zoning, incorporating affordable housing in projects that receive public funding and a land banking fund were also suggested. However, it is unclear if the mixed-income housing strategy was ever created (Hickey, 2013).

Around the same time Denver was completing the TOD Strategic Plan, Enterprise Community Partners, a national non-profit, commissioned a study evaluating future demand for housing near rapid transit. The study concluded there was a risk that low-income households would not be able to afford TOD areas and that increased demand for housing near rapid transit could displace existing low-income residents (Belzer et al., 2007). The study also provided recommendations to achieve mixed-income TOD, many of which mirrored suggestions in Denver's TOD Strategic Plan. However, the study provided novel recommendations including the creation of a land acquisition fund, use of RTD lands for affordable housing developments and modifications to the TOD loan pool to make the program more attractive (Belzer et al., 2007).

7.3.1.3 Strategies and Partnerships

A great deal of progress has been made on equitable TOD since these early initiatives. Partnerships have been formed between the City and County of Denver, non-profits and philanthropic agencies. However, one of the most significant achievements and most commonly cited policy tools is the Denver TOD Fund, which provides low interest, multi-year loans (Padilla, 2010; Hickey, 2013).

The Denver TOD Fund was established in 2010 as the first program in the United States to finance land or property acquisition to support affordable housing near transit (Hickey, 2013). Financial contributions to the fund were provided by the City and County of Denver, private banks and a variety of non-profit organizations, such as Enterprise Community Partners, which manages the fund. In total, $15 million USD was raised and initially could only be accessed by the Urban Land Conservancy (Padilla, 2010).

The Urban Land Conservancy (ULC) is a Denver based non-profit that operates a community land trust (Urban Land Conservancy, 2017). The ULC secures land near current or planned transit projects within the City and County of Denver (Hersey & Spotts, 2015). With the land secured, the ULC typically seeks a developer to construct new affordable units under long-term leases (Padilla, 2010). The fund has also been used to acquire existing properties to preserve affordability (Hickey, 2013). In 2011, the ULC utilized the fund to purchase a site within the west corridor for $2.3 million USD (Pollack & Prater, 2013). One portion of the site was sold to a development corporation with a long-term affordability restriction and another portion to the City and County of Denver (Hickey, 2013). The lands were eventually developed into a mixed-use building with 80 non-market apartments and a public library which formed what the ULC branded as the Mile High Vista (Pollack & Prater, 2013).

While the Denver TOD Fund provided capital to secure the land, additional federal and state funds were required to finance site remediation and planning (Rail~Volution, 2016). Federal funding was also required to construct the affordable units through the Low-Income Housing Tax Credit program (Rail~Volution, 2016). The Mile High Vista benefited from strong partnerships between the City and County of Denver, Enterprise Community Partners and the ULC as these groups coordinated efforts to secure funding from senior governments (Pollack & Prater, 2013).

Since 2010, the Denver TOD Fund has supported the preservation or creation of over 1,100 units throughout Denver with a majority of these units being rental units (Enterprise Community Partners, 2017). In 2014 the fund grew to $24 million USD with support from the Government of Colorado and philanthropic agencies. The fund was renamed to the Denver Regional TOD Fund and made accessible to affordable housing developers across the region (Enterprise Community Partners, 2015). The Denver Regional TOD Fund provides loans up to $5 million USD for five-year periods to acquire land or existing properties within 800 metres of an existing or future fixed rail station or within 400 metres of a high frequency bus corridor (Enterprise Community Partners, 2015).

The strength of the Denver Regional TOD Fund is that it provides access to low interest, multi-year capital (i.e. patient capital) to secure property or land. However, previous research notes that it is only one strategy among many within the region that support affordable housing, and as the Mile High Vista project demonstrates, the fund cannot preserve or create affordable units on its own (Padilla, 2010).

Prior to the creation of the Denver Regional TOD Fund, the City and County of Denver was exploring innovative solutions and partnerships to support equitable TOD. The City and County of Denver, the City of Lakewood and their two housing agencies formed a West Corridor Working Group. This group completed a TOD implementation strategy in 2011 (Hickey, 2013). The inter-agency strategy was designed to bring more consistency to individual station area plans, better coordinate investment between the four public agencies and spark private investment (West Corridor Working Group, 2011). The strategy evaluated each station along the West Line and created individual approaches to redevelopment. Housing affordability formed one aspect of the redevelopment approach and the strategy included recommendations to acquire properties to preserve affordable units or acquire land to create new units where appropriate. Pendall et al. (2012) notes that these housing agencies have made significant contributions towards equitable TOD. As well, both housing agencies remain committed to supporting equitable TOD as they have established goals to develop housing projects near transit (Denver Housing Authority, 2016; Metro West Housing Solutions, n.d.).

The City and County of Denver also partnered with the state government and Enterprise Community Partners to provide funding for the ULC to secure an existing 62 unit apartment complex within one block of the West Corridor (Quigley, 2010). Support for equitable TOD was also evident through both state and RDT actions to coordinate transportation and housing affordability policies. The Colorado Housing Finance Agency modified scoring criteria for funding programs to prioritize the preservation and creation of affordable units near transit (Quigley, 2010). Lastly, the RTD revised its Strategic Plan for TOD in 2010 to make a stronger commitment to affordable housing by adopting a policy to incorporate affordable housing in station area developments on RTD-owned lands (Hickey, 2013).

7.3.1.4 Summary

The Denver West Corridor demonstrates the value of a land acquisition program and planning and coordination efforts. The Denver Regional TOD Fund is a significant achievement that has supported the creation and preservation of affordable units by filling a gap in the equitable TOD framework. However, the fund does not work in isolation. The fund has benefited from a partnership with an existing community land trust and still relies on funding from senior governments to generate affordable units. Equitable TOD within the West Corridor has also benefited from a high degree of planning and coordination efforts and a willingness of local governments to explore innovative partnerships. These initiatives have served to align efforts among a wide range of agencies.

7.3.2 Atlanta BeltLine

7.3.2.1 Context

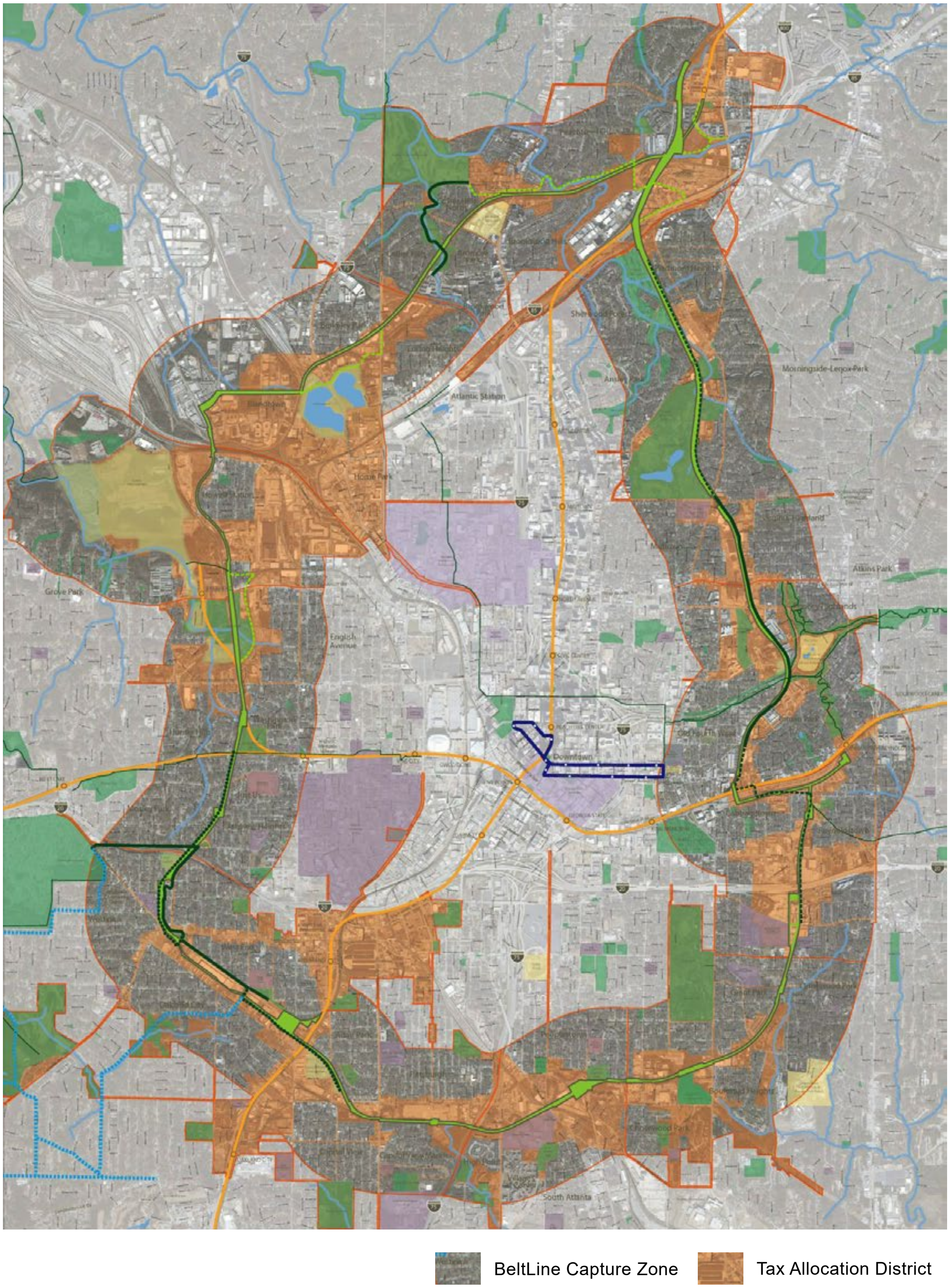
The City of Atlanta is granted Home Rule authority and is able to establish local government authorities (Georgia Department of Community Affairs, 2017; New Georgia Encyclopedia, 2017). Invest Atlanta is one of these authorities which has the capacity to raise and leverage funds through a variety of tools including bonds, loans, tax districts and tax credits (Invest Atlanta, 2016a).

The Atlanta BeltLine is a 22-mile streetcar loop and 33-mile multi-use trail project that will surround downtown Atlanta (Atlanta BeltLine, 2017a). The BeltLine was first conceived by Ryan Gravel, a graduate student at Georgia Tech University in 1999 (Padilla, 2010). The concept gained momentum through the early 2000s and was officially launched in 2005 (Atlanta BeltLine, 2017b). This approximate $5 billion project is forecasted for completion in 2030 (Atlanta BeltLine, 2017c). A 25-year tax allocation district for the BeltLine was established to finance the project with additional support anticipated from the federal government and private funders (Atlanta Development Authority, 2005). The tax allocation district works the same as tax increment financing, where tax revenue above a baseline level within a geographic area is used to finance the projects (Padilla, 2010). The BeltLine project and the tax allocation districts are depicted in Figure 14.

The City of Atlanta and Invest Atlanta formed two principal agencies to guide this complex project. The Atlanta BeltLine Partnership is a non-profit agency that supports the project through fundraising efforts and public engagement initiatives, while the Atlanta BeltLine Inc. manages the overall project (Hersey & Spotts, 2015). Two advisory bodies were also created to facilitate public input into the management of the project. The Atlanta BeltLine Tax Allocation District Advisory Committee (TADAC) manages funds generated through the tax allocation district, while the BeltLine Affordable Housing Advisory Board (BAHAB) provides recommendations on the use of funds committed to affordable housing (Atlanta BeltLine, 2017d, 2017e).

Metropolitan Atlanta Rapid Transit Authority (MARTA) is the public transit service agency for the Atlanta metropolitan region. MARTA is less directly involved in the BeltLine as the project is being managed by the Atlanta BeltLine Inc. and no transit infrastructure has been constructed to date. However, MARTA has undertaken other initiatives to support equitable TOD more broadly within the region (Hersey & Spotts, 2015).

Figure 14. Atlanta BeltLine and Tax Allocation Districts (Atlanta BeltLine, 2017f)



7.3.2.2 Rise of Equitable TOD

There was a commitment to affordable housing within the BeltLine corridor from the beginning of the project. Padilla (2010) suggests this commitment stemmed from a 2004 report that outlined housing and transportation affordability issues in the region as well as strong leadership on housing affordability from the Mayor of Atlanta. This early commitment is evident in the 2005 Redevelopment Plan, the first official plan for the BeltLine, which established a goal to provide 5,600 affordable units (Atlanta Development Authority, 2005). The City of Atlanta also explicitly incorporated this 5,600 unit goal in the legislation that enabled the tax allocation district (City of Atlanta, 2005).

7.3.2.3 Strategies and Partnerships

The BeltLine Affordable Housing Trust Fund was established as the primary mechanism to achieve the affordable housing goal (Hickey, 2013; Immergluck & Balan, 2017). The trust fund receives 15% of bond revenues generated from the tax allocation district (Immergluck & Balan, 2017). Funds are provided as grants and can be accessed by both non-profit and for-profit developers to create affordable ownership and rental opportunities within the corridor (Invest Atlanta, 2016b). The grants can be used for land acquisition, construction or renovation projects and can also be used in coordination with other funding programs (Invest Atlanta, 2016b). The grant is limited to 30% of total project costs or a cap of $2.5 million USD per project (Invest Atlanta, 2016b). Grants are only provided for projects located within the tax allocation district (Invest Atlanta, 2016b). As evident in Figure 14, the tax allocation district only covers a portion of the BeltLine corridor. The grants secure affordability for 15-year periods, but in some cases, the affordability requirement will expire before the BeltLine project is completed (Hickey, 2013).

In 2005, the tax allocation district program was anticipated to generate $240 million USD for the housing trust fund by 2030 (Padilla, 2010). However, by 2013 only $8.8 million USD had been generated (Hickey, 2013). The significant difference between anticipated and actual revenue has largely been attributed to the recession (Hersey & Spotts, 2015). Conflicts between the school district and the BeltLine have also plagued the tax allocation district program as these two uses were competing for tax revenue (Immergluck & Balan, 2017). This funding shortage has impacted the number of affordable units produced. By 2014, only 985 units were generated, which put the BeltLine well behind schedule to achieve its original target (Integrated Action Plan, 2015). The proportion of affordable rental units to owned units is not clear as the units reported were aggregated. However, Hickey (2013) indicates the trust fund has been primarily focused on homeownership.

Hersey and Spotts (2015) and Padilla (2010) identify three other BeltLine strategies that seek to address housing affordability. These include a plan for equitable development, a mixed-income TOD strategy and a requirement for developers to provide community benefits if they accept project funding generated through the tax allocation district.

An Equitable Development Plan was created by the TADAC and Atlanta BeltLine Inc. This plan established four equity and sustainable development principles to guide the entire project. These principles include the “integration of people and place strategies; reduction of local and regional disparities; promotion of triple bottom line investments; and inclusion of meaningful community voice, participation, leadership and ownership” (Atlanta BetlLine, 2012, p. 1). These principles provide a strong foundation for the project, but it is not clear if they have been effective in practice.

The Atlanta BeltLine Inc., BAHAB, Enterprise Community Partners and an Atlanta based real estate consulting firm partnered to create a mixed-income TOD strategy in 2013 (Atlanta BeltLine, 2017g). The strategy determined there was a growing need for affordable housing within the BeltLine corridor and provided recommendations to enhance the impact of the housing trust fund such as aligning the fund with other funding programs and integrating a community land trust (Atlanta BeltLine, 2013). Although Hickey (2013) describes the establishment of the Atlanta Land Trust Collaborative in 2009, which was led by the Atlanta BeltLine Partnership, the author indicates the land trust did not receive financial support from the BeltLine. Therefore, the Atlanta Land Trust Collaborative must not have been functioning adequately to suit the BeltLine’s needs.

Lastly, the City of Atlanta passed legislation that requires developers to provide community benefits in exchange for project funding through the tax allocation district (Padilla, 2010). The benefits are focused on providing access to jobs, training and fair wages for low-income residents near the BeltLine. The legislation also established a set of 12 principles, including mixed-income developments and environmental and accessibility standards that are intended to help generate additional community benefits (Atlanta BeltLine, 2010).

The cases did not provide much discussion of partnerships. Instead, the partnerships seem to be embedded within the structure of the BeltLine project. For example, the tax allocation district established a formal partnership with Atlanta Public Schools and the neighbouring county which encompasses most of the City of Atlanta. Hickey (2013) identifies other partnerships that have been forged to secure affordable homeownership, but these partnerships were omitted as homeownership is outside the scope of this project.

There are other initiatives within the region that support equitable TOD, but they are not well aligned with the BeltLine. Atlanta's TransFormation Alliance (Alliance) is one of these initiatives. The Alliance "is a collaboration of community advocates, policy experts, transit providers and government agencies that believes equitable transit-oriented development can promote community building practices to link communities near transit stations with the opportunities they need to thrive" (Atlanta's TransFormation Alliance, 2017). Hersey and Spotts (2015) indicate the Alliance has also worked with MARTA to incorporate equitable TOD into MARTA's TOD guidelines and has a large network of established partners. However, the Beltline is noticeably absent from the list of partners, despite the obvious alignment, between the Alliance and Beltline (Atlanta's TransFormation Alliance, 2017).

7.3.2.4 Summary

The BeltLine primarily provides insight into the function of both a tax allocation district and a housing trust fund. The tools were designed to assist in the creation and preservation of affordable housing units. However, the risk in using a tax allocation district or TIF funding scheme, which is dependent on property tax increases, is that property taxes may not generate the anticipated revenues. Given this tool was the primary funding mechanism to deliver affordable housing in the BeltLine, the project's ability to achieve equitable TOD is severely limited. Immergluck and Balan (2017) have suggested utilizing additional strategies such as low interest financing, property tax relief for low-income residents and inclusionary zoning to support the creation and preservation of affordable rental housing. Hickey (2013) also notes that for-profit developer's inexperience with affordable housing programs in Atlanta has limited progress and that more substantial incentives are required to overcome this barrier. Ultimately the project's prominent commitment to affordable housing and equity can be questioned. This is reinforced by the fact that two Atlanta BeltLine Partnership board members, including Ryan Gravel, the graduate student who conceived the project, recently resigned, citing a lack of progress on housing affordability as the reason (Immergluck & Balan, 2017).

7.3.3 Boston Fairmount/Indigo Corridor

7.3.3.1 Context

The state of Massachusetts provides the City of Boston Home Rule authority, but these powers are more restricted than in other states (CTOD, 2007). The state restricts the city's ability to raise funds through taxing and borrowing (CTOD, 2007; Padilla, 2010). This lack of authority has limited the city's capacity to support equitable TOD.

Massachusetts Bay Transportation Authority (MBTA), a public transit agency, operates an extensive transit network within the Boston region. This network serves the broader metropolitan area.

The Fairmount line is a nine-mile commuter rail line that runs through established low-income and racially diverse communities (CTOD, 2007). It is one of the city's oldest commuter rail lines with a history marked by intermittent service and community activism. Service began in the 1850s, ceased after WWII, but commenced again in 1980s due to the construction of an adjacent rail line (Griffith, 2017). The MBTA was going to remove service in 1987 but community groups won the fight to preserve it (Pendall et al., 2012). Then around 2000, community groups began advocating for improved transit service, including new stations and upgrades to existing stations (Fairmount Indigo Line CDC Collaborative, 2006). The MBTA completed a feasibility study in 2002 that provided a rationale for expanding service and announced the addition of four new stops and investments in existing stations bringing the total to nine (Pendall et al., 2012). Three of the four new stations were opened in 2013 with the fourth to open in 2019 (MBTA, 2017). Figure 15 depicts the rail line and its stations as of 2012. The completed stations are represented as white circles, three stations under construction are represented as grey circles and two potential stations are represented as small faded circles.

7.3.3.2 Rise of Equitable TOD

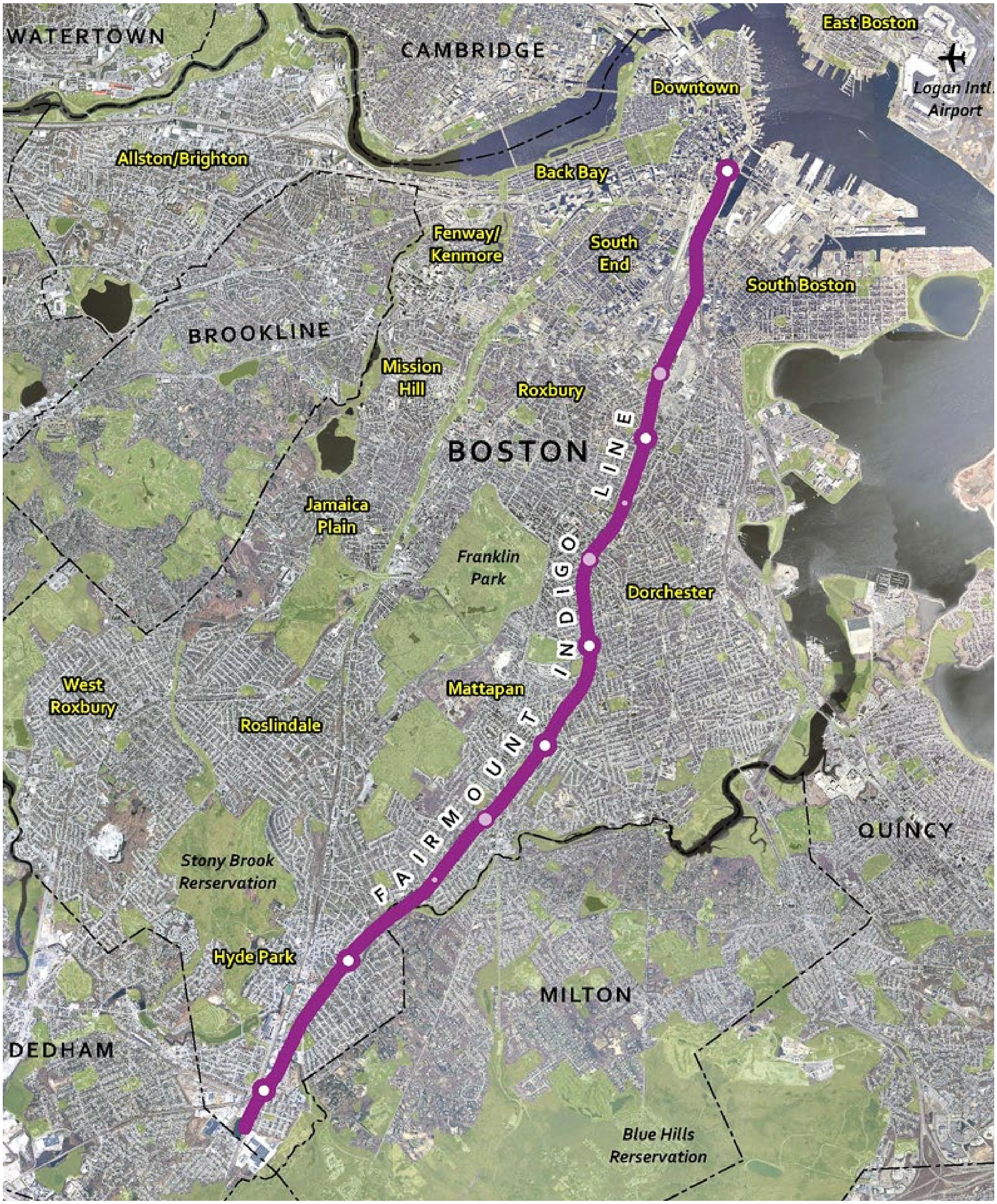
Community activism served to bring new investment and improved transit access, but with that brought a focus to housing affordability concerns (Pendall et al., 2012). In 2004, four local community development corporations formed the Fairmount Indigo Line CDC Collaborative (Collaborative). Community Development Corporations (CDCs) are non-profit organizations that undertake community revitalization efforts which typically deliver programs to assist low-income residents and develop affordable housing (Community-Weath.org, n.d.). The Collaborative was formed to coordinate affordable housing efforts and continue to advocate for improved transit service (CTOD, 2007).

Around the same time, the Massachusetts government launched a smart growth agenda and adopted 12 principles for sustainable development that were intended to coordinate and guide state decision-making (Massachusetts Office for Commonwealth Development, n.d.; Springer, n.d.). Some of these principles included improving both housing and transportation options, promoting equity and concentrating development. Equitable TOD was well aligned with this policy agenda.

7.3.3.3 Strategies and Partnerships

In 2006, the Collaborative completed a plan for the corridor, tilted Boston's Newest Smart Growth Corridor: A Collaborative Vision for the Fairmount/Indigo Line. The branding of the document was likely strategically aligned with the state's smart growth agenda. The plan focused on affordable housing and realizing economic development that serves low-income communities without displacing existing residents (Fairmount Indigo Line CDC Collaborative, 2006). The plan identified key opportunity sites and proposed developments at each station along the line.

Figure 15. Boston Fairmount/Indigo Line (Boston Planning and Development Agency, 2017)



Working within the framework of this plan, the individual CDCs have developed a significant amount of affordable housing. Between 2004 and 2014, a total of 12 projects have created 566 units within 800 metres of the rail line (Fairmount Indigo Line CDC Collaborative, 2015). Close to 450 units have been retained as long-term rentals with a near split between rental preservation and new construction. The CDCs receive support from both local and national philanthropic organizations (Pendall et al., 2012). The city and the state provided a number of strategies that supported the CDCs and equitable TOD more broadly within the region (CTOD, 2007).

The City of Boston's Linkage Program generated funds for affordable housing projects that were used by non-profit or for-profit developers (CTOD, 2007). The program charged a prorated fee for large developments (greater than 100,000 square feet). This program supported one of the CDC's developments in the corridor. The city's Planning and Development Agency has also utilized a policy that waived fees for the CDCs when acquiring property (CTOD, 2007).

The Massachusetts state government established at least seven strategies and programs that were linked to the state's smart growth agenda. Five of these strategies were funding programs. Table 5 describes these strategies in more detail. The reviewed cases only explicitly linked one of these strategies to a CDC housing project. However, the suite of programs reflects the state's commitment to equitable TOD more broadly. While these programs demonstrate a strong commitment, the Center for Transit-Oriented Development (2007) suggests that too many individual or "specialized" funding programs can serve as a barrier, since aligning multiple program criteria and timelines can be difficult for affordable housing developers. Rather, modifying existing affordable housing programs may be more effective (CTOD, 2007).

In addition to the substantial financial commitments, the state enabled local governments to streamline development permits for affordable housing developments and partnered with the MBTA to create a TOD Planning Manager position to improve coordination between housing and transportation (CTOD, 2007). Responsibilities for this position also included assisting both non-profit and for-profit developers in navigating the housing funding programs. The MBTA also embraced the coordination efforts and established an agreement with the state and Boston's Planning and Development Agency to promote affordable housing on MBTA owned lands (CTOD, 2007).

Even with the extensive suite of strategies, the CDCs still identified securing land as an issue (CTOD, 2007; Pendall et al., 2012). Padilla (2010) indicates the Collaborative began investigating the establishment of a TOD fund similar to Denver's to address this gap. In 2014 a group of philanthropic agencies and the state launched the Equitable Transit-Oriented Development

Table 5. Massachusetts Funding Programs

Program	Description
Smart Growth Zoning	• Incentive for municipalities to create overlay zoning districts around transit stations • Cash payment for new housing construction or rehabilitation within the district • Requires 20% of housing developments within rezoned areas to be affordable • Payments range between \$10,000 and \$600,000 USD, plus \$3,000 per new unit
Commercial Area Transit Node Housing Program (CATNHP)	• Available to municipalities, for-profit and non-profit developers • Targeted to rental housing creation or preservation within TOD areas for developments greater than 25 units • 50% of total units must be affordable for 30-year period • 30-year loans with 0% interest • Up to \$1 million USD per development or up to \$50,000 USD per unit
Affordable Housing Trust Fund	• Available to municipalities, for-profit and non-profit developers • Targeted to create new or preserve existing housing (rental and ownership) • Provides loans up \$1 million USD per project or \$50,000 per unit • Must be affordable for 30-year period
TOD Infrastructure and Housing Support Program TOD Bond Program (no longer active)	• Available to public agencies or public-private partnerships • Targeted to new housing or renovations projects (ownership or rental) within TOD areas for developments greater than 25 units • 25% of total units must be affordable for 30-year period • Grants up to \$2 million USD for housing projects • Provided funding support for one CDC project
Priority Development Fund (no longer active)	• Targeted new affordable rental housing near transit stations • Provided \$22 million USD in planning and development grants

Sources: CTOD, 2007; Commonwealth of Massachusetts, 2017; Department of Housing and Community Development, 2007; Executive Office of Transportation, 2006; Housing and Economic Development, 2017

Accelerator Fund to fill this gap (LISC, 2015, n.d.). This fund totals $25 million USD and can be used for preservation or development of new affordable or mixed-income housing. The fund is managed by the Local Initiatives Support Corporation (LISC), a national non-profit. Loans are provided for two to three year periods for amounts between $200,000 to $1.5 million USD (LISC, n.d.). The fund can be accessed by both non-profit and for-profit developers, but non-profits receive a lower interest rate.

Neither the City of Boston nor the Planning and Development Agency endorsed the Collaborative's 2006 corridor plan (CTOD, 2007; Pendall et al., 2012). However, in 2012 the Planning and Development Agency initiated their own Fairmount/Indigo Corridor planning project. Their corridor plan was completed in 2014 and acknowledges the work of the Collaborative. Their plan also includes affordable housing, equity and displacement prevention as key components which likely signifies the impact of the Collaborative's efforts on the issue (Planning and Development Agency, 2015).

The Collaborative is still actively pursuing equitable TOD. The Collaborative anticipates producing another 300 affordable units by 2018 and is evaluating other projects that could produce another 200 affordable units (Fairmount Indigo Line CDC Collaborative, 2015). The Collaborative's latest strategic plan highlights three priority areas. These include TOD without displacement, transit equity and financial resilience through improved employment opportunities (Fairmount Indigo Line CDC Collaborative, 2015). Although the CDCs have accomplished a great deal over the last 13 years, these priorities reveal the need for continued action towards equitable TOD.

7.3.3.4 Summary

The Fairmount/Indigo Corridor highlights the strength of local community groups and the benefit of strong senior government action in coordinating policy. The Collaborative demonstrates that leadership can take many forms and that working together with a unified voice can have a tremendous impact. This spirit of coordination and collaboration was also represented in the efforts of the state government and the MBTA.

8. Discussion

The goal of this project was to identify strategies to minimize gentrification and resident displacement in the development of the Joseph Howe Future Growth Node into a transit-oriented community. Equitable TOD is one approach that could help address these issues as it utilizes the principles of TOD but provides an emphasis on serving the needs low- and moderate-income households (Hersey & Spotts, 2015). Reviews of equitable TOD best practice literature, HRM strategies and partnerships, and three cases provide insight into the development of strategies to realize equitable TOD within HRM.

Equitable TOD literature reveals four best practice themes. These include planning and coordination, land access and acquisition, incentives and regulations, and financial tools and programs. These themes provide a framework for conceptualizing the components of an effective equitable TOD approach. They also assist in evaluating HRM's capacity for equitable TOD.

HRM has recently made a stronger commitment to affordable housing. The Municipality is primarily exploring ways to support affordable housing through new incentives and regulations or actively reducing regulatory requirements in other areas. The Municipality has also joined the Housing and Homelessness Partnership, which provides a strong framework to coordinate multi-jurisdictional and multi-agency efforts. However, realizing equitable TOD in HRM requires improved planning and coordination between affordable housing and transit initiatives as well as programs to support land access and acquisition. Denver's West Corridor, Atlanta's BeltLine and Boston's Fairmount/Indigo Corridor demonstrate strategies and partnerships that address these two gaps. Denver and Boston provide insight into a comprehensive suite of strategies, while Atlanta may serve as more of a cautionary case.

Overall, these cases illustrate the complexity of equitable TOD. Preserving or creating affordable rental housing and TOD are challenging policy objectives on their own. The integration of the two makes equitable TOD that much more challenging. Regardless of their relative success, the cases provide insight into future equitable TOD applications. Most importantly, they demonstrate that no single strategy, policy tool or partnership can deliver equitable TOD. The other primary findings are discussed within HRM context here.

A strong commitment to equitable TOD is a consistent theme across all three cases. Each case demonstrates years of effort from local and state governments and non-profit groups. As TOD projects are typically multi-year initiatives, efforts to support affordable housing must be sustained for extended periods of time. Pendall et al. (2012) suggests that communities with a strong commitment to affordable housing overall will generally be more successful in achieving equitable TOD. As such, HRM's recent commitment to affordable housing provides a strong foundation to support equitable TOD.

The establishment of partnerships and a willingness to collaborate appears to contribute to success. Both Denver and Boston highlight innovative partnerships which have supported the preservation and creation of affordable housing within TOD areas. These partnerships have also been supported or enabled by active philanthropic agencies. Conversely, the BeltLine seems to lack the level of collaboration demonstrated in the other two cases. HRM could explore partnership opportunities with local non-profit agencies or through the Housing and Homelessness Partnership to secure funding from agencies such as CMHC.

Equitable TOD strategies were guided by a plan of some sort in all three cases. These were primarily TOD specific plans, but affordable housing was well integrated in each case. Coordination between multiple agencies was also highlighted in the cases. Numerous local government agencies and separate transit service providers increase the complexity of equitable TOD in the United States. Leadership was demonstrated by local governments in Denver and Atlanta, but Boston illustrates that this leadership role can also be filled by non-profit organizations. The coordination of affordable housing and transit should theoretically be less complex within HRM as there are fewer agencies to coordinate with. Unlike the three cases, Halifax Transit is embedded within HRM administration. As well, the Housing and Homelessness Partnership provides a mechanism to facilitate coordination between multiple levels of government and non-profit organizations.

Land acquisition programs have also played a large role in supporting equitable TOD, but these programs do not work in isolation. Land acquisition strategies need to be complemented by stable funding to develop or renovate housing and vice versa. Denver created the first TOD land acquisition fund which filled an identified gap. Yet, the preservation or creation of affordable housing units still rely on senior government funding. Boston has benefited from the provision of multiple local and state funding sources to support equitable TOD. However, the CDCs, who were the primary providers of affordable housing still identified the need for a land acquisition fund similar to Denver's. Lastly, while Atlanta has a program to secure land within TOD areas, it has struggled to generate units, as it relied primarily on one funding source. The *HRM Charter* would restrict the establishment of an HRM acquisition program. However, HRM could support the establishment of a non-profit acquisition program as the *HRM Charter* enables the Municipality to provide grants to non-profits and charities. As well, the pursuit of natural person powers may enable HRM more latitude to create or support a land acquisition program moving forward. Regardless of how the program is created, any acquisition program would need to be well aligned with existing affordable housing funding programs.

The availability of stable funding is the most significant contributing factors to preserving or creating new affordable housing. The cases present a variety of funding sources and funding schemes. Denver and Boston utilize a combination of state, local and non-profit funding sources, while Atlanta has relied primarily and somewhat unsuccessfully, on one local funding source. Relying on one program is not sufficient, but as the Center for Transit-Oriented Development (2007) indicates, too many individual or specialized programs can also limit program effectiveness. The cases also demonstrate that incentives at times have not been strong enough, which has led to the underutilization of funding programs. As the federal and provincial governments provide the bulk of the funding for affordable housing within Nova Scotia, HRM could engage the CMHC and Housing Nova Scotia to discuss modifications to existing programs to align with equitable TOD and determine if the program incentives are strong enough in TOD areas. Natural person powers may provide HRM with more authority to raise and expend funds. This could allow HRM to bundle additional incentives with existing funding programs or create new ones if the federal and provincial programs cannot be modified.

While the cases provide insight into multiple strategies and partnerships that have supported the delivery of affordable housing within TOD areas, there are two gaps which are common among them. The cases focus almost exclusively on non-market affordable housing. Therefore, there is little insight into strategies that may assist in the preservation of private market rentals that are affordable. Additionally, there is almost no discussion of displacement. Displacement is only referenced within the Fairmount/Indigo Corridor case but even here, there is no discussion of the type of displacement targeted. Literature indicates that displacement can occur in many forms (e.g. direct, exclusionary, social) which may require separate strategies to address it. The combined impact of these two gaps is reinforced by Jones (2015) who demonstrated that policies which promoted TOD in Vancouver led to the loss of market rate affordable rental housing and exclusionary and social displacement. While a strategy that focuses on non-market housing may help address part of the gentrification and displacement issue, additional strategies to target market rate affordable housing and other, non-direct forms of displacement may be warranted.

8.1 Recommendations

The literature and the three cases demonstrate that delivering equitable TOD requires an integrated approach. HRM has a strong foundation to support equitable TOD. Recommendations are provided here to build capacity for equitable TOD within HRM. These recommendations are framed as initiatives that can be led by HRM and are primarily targeted to the Joseph Howe Future Growth Node if the area is developed into a transit-oriented community. Additional recommendations are also provided which could support the achievement of equitable TOD in other areas where TOD is being considered.

1. Support efforts to preserve the existing non-market affordable housing near the Joseph Howe Future Growth Node.

This could include waiving the annual application required for the Non-profit Tax Relief Program by automatically considering non-profit housing organizations in the program for the following year. Revenues generated through the inclusionary zoning or density bonusing programs from payments made in lieu of affordable housing developments could also be targeted to preservation efforts.

2. Identify strategies to support the preservation of existing market rate affordable rental housing near the Joseph Howe Future Growth Node. This could include targeting the Solar City program to landlords in the area, the creation of a renovation funding program or property tax relief for landlords providing private market rentals that are affordable.

3. Utilize affordable housing strategies being considered in the Centre Plan within Future Growth Nodes and potential transit-oriented communities identified in the Integrated Mobility Plan to create new affordable rental units. These strategies include inclusionary zoning, reduced lot sizes, secondary dwelling units and allowing a variety of housing forms. Density bonusing would only need to be targeted to the transit-oriented communities identified in the Integrated Mobility Plan, as the Centre Plan discusses density bonusing in Future Growth Nodes. Waiving minimum parking requirements and development fees for affordable housing developments would also prove beneficial.

4. Adopt affordable housing targets for the Future Growth nodes identified in the Centre Plan and potential transit-oriented communities identified in the Integrated Mobility Plan. This would also apply to station area plans that are referenced in the Integrated Mobility Plan.

5. Explore the creation of a housing trust fund, community land trust or TOD Fund that would provide affordable housing developers access to capital to support the purchase of existing rental properties or the purchase of land to develop new units.

6. Seek opportunities to secure additional land along transit corridors or around potential TOD sites when acquiring land for transit infrastructure. This land could then be sold or leased at below market value to support affordable housing.

7. Target community engagement initiatives to existing low- and moderate-income residents in the development of plans for Future Growth Nodes or station areas as part of the Integrated Mobility Plan. Seek to identify amenities that will benefit existing residents. Consider the potential for different types of displacement that may result from development.

8. Improve the integration of affordable housing and transit planning initiatives or policies. This could include expanding the Housing and Homelessness Partnership's Affordable Housing Working Group to include HRM Transit staff or transportation planners. Future housing affordability

studies could also include household transportation expenditures to provide a more complete understanding of housing affordability.

8.2 Limitations and Future Research

There are two primary limitations to this project. First, the equitable TOD cases reviewed were set in cities with different governance structures from HRM. The variability in these structures, paired with the changing nature of government policies, presented challenges in inventorying all strategies or policy details that may influence equitable TOD. Future research could investigate if there is sufficient movement on this issue within Canadian municipalities to generate new equitable TOD cases. Second, the studies demonstrating the link between TOD and gentrification are based in larger municipalities with established rapid transit systems. These studies were used to provide an understanding of the phenomenon, rather than predict its occurrence. This is an important distinction as this project was not seeking to predict or measure gentrification but instead explore strategies that could mitigate a phenomenon that may occur. Future research within HRM could establish metrics to monitor gentrification and displacement as well as investigate the combination of household shelter and transportation expenditures to provide a more complete understanding of housing affordability.

8.3 Conclusion

HRM has recently made a commitment to address housing affordability. However, this commitment needs to consider the potential impact of the Municipality's other initiatives such as TOD and rapid transit. This project explored how TOD can compound housing affordability issues and presented one approach, equitable TOD, that could be used to help mitigate this issue. Realizing equitable TOD in HRM requires improved planning and coordination between affordable housing and transit initiatives as well as programs to support land access and acquisition. Three equitable TOD cases provide insight into strategies that address these two gaps.

As demonstrated through the cases, equitable TOD is a complex and challenging policy objective. No one policy can deliver equitable TOD. Multiple efforts such as a strong commitment to equitable TOD, establishment of partnerships, a willingness to collaborate, integrated planning efforts, policies or programs to facilitate land acquisition and the availability of stable funding are required. While not evident in the cases, the literature provides evidence to support the development of strategies to address the various dimensions of displacement that may also result from TOD initiatives. Although TOD may be in its infancy in HRM, the recommendations identified in this project provide the foundation for a more equitable approach to development in HRM.

Appendices

Appendix A: Affordable Rental Housing Funding Programs

Agency	Program	Description
Federal (CMHC)	Investment in Affordable Housing	• Federal government committed $51.2M; Nova Scotia provincial government committed matched funds • Funding supports increasing the supply of affordable housing, improving access to affordable housing including rent supplements and shelters and preserving, repairing or renovating existing affordable housing • Program ends in 2019
Federal (CMHC)	Social Infrastructure Fund	• Federal government committed $21.4M; Nova Scotia provincial government committed matched funds • Funding supports seniors housing, shelters, improvements to existing public housing and existing Housing Nova Scotia funding programs • Program ends in 2018
Federal (CMHC)	Social Housing Agreement	• $1.3B committed over 37 years • Funding supports public housing, non-profit housing, co-operative housing, urban native housing and rent supplement programs • Program ends in 2034
Federal (CMHC)	Loans Administration for Social Housing	• Provides loans to social housing providers, First Nations housing providers, provinces and municipalities • Ongoing program
Federal (CMHC)	Direct Lending for Social Housing	• Provides loans at discounted rates to First Nations housing providers to finance new production or to existing "federally-assisted" housing providers to refinance projects • Ongoing program
Federal (CMHC)	Affordable Rental Innovation Fund	• $200M fund to support innovation in rental housing including financing schemes that reduce the dependence on government funding over the long-term • Available to municipalities, private sector developers and builders and non-profit housing providers • Affordability must be maintained for at least 10 years • Program ends in 2022
Federal (CMHC)	Rental Construction Financing	• Provides $2.5B in low cost loans • Available to municipalities, private sector developers and builders and non-profit housing providers • Rent is capped at 30% of median household income for a minimum of 20% of total units • Program ends in 2021

Federal (CMHC)	Seed Funding	• Grants up to $50,000 to support soft costs such as preliminary assessments and professional fees • Available to municipalities, private sector developers and non-profit, co-operative, and First Nations housing providers as well as individuals • Projects must be affordable as defined by the local municipality • Ongoing program
Federal (CMHC)	Mortgage Loan Insurance (Affordable, Student, Single Room Occupancy, Supportive and Housing)	• Provides mortgage insurance for construction, purchase or refinancing of a range of housing projects • Rent is capped at 30% of median household income for a minimum of 20% of total units for new construction • Rent must be less than the 30th percentile of rents for 80% of the units for existing properties • Affordability must be maintained for at least 10 years • Ongoing program
Provincial (Housing Nova Scotia)	New Rental Housing	• Provides up to $50,000 per unit in capital funding to create new affordable units • Available to non-profit and private housing providers • Affordability must be maintained for at least 15 years
Provincial (Housing Nova Scotia)	Rental Housing Preservation	• Provides up to $25,000 per unit in capital funding and up to $25,000 in rent supplements per unit over a 10 year period to rehabilitate affordable units • Available to non-profit and private housing providers • Affordability must be maintained for at least 15 years
Provincial (Housing Nova Scotia)	Landlord Rent Supplement	• Provides funding to landlords who provide rental housing to low-income households • Subsidizes rent in private rental
Provincial (Housing Nova Scotia)	Rental Residential Rehabilitation Assistance	• Provides up to $24,000 per unit to rehabilitate existing units to preserve affordability for low-income renters • Available to landlords • Rental cap is placed on units to maintain affordability
Provincial (Housing Nova Scotia)	Rooming House Residential Rehabilitation Assistance	• Provides up to $16,000 per unit to rehabilitate existing rooming houses • Available to owners of rooming houses • Rental cap is placed on units to maintain affordability
Provincial (Housing Nova Scotia)	Disabled Residential Rehabilitation Assistance	• Provides up to $16,000 per unit or up to $24,000 per unit depending on building type to modify existing affordable units to improve accessibility • Available to landlords • Landlords must agree to maintain affordability
Provincial (Housing Nova Scotia)	Shelter Enhancement	• Provides up to 100% funding for repairs to improve existing shelters or build new shelters • Available to non-profit and charities that operate shelters

HRM	Mandatory Operating Def	• Provides annual funding that supports the operation of Metropolitan Regional Housing Authority • The amount varies year by year
HRM	Non-Profit Tax Relief	• Provides property tax relief or a complete exemption on an annual basis • Available to non-profits that operate emergency shelters, supportive housing or affordable housing which is defined as independent living with below market rents
HRM	Community Grants	• Can provide grants of $25,000 for shelters, temporary housing, transitional housing and supportive and independent affordable housing • Supports capital projects

Sources: CMHC, n.d., 2014b, 2017g, 2017h, 2017i, 2017j, 2017k; Government of Nova Scotia, 2017; HRM, 2016b, 2017d, 2017g, 2017h, 2017i; Housing Nova Scotia, 2016, 2017c, 2017d, 2017e, 2017f, 2017g, 2017h, 2017i, 2017j

Appendix B: Equitable TOD Best Practices References

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