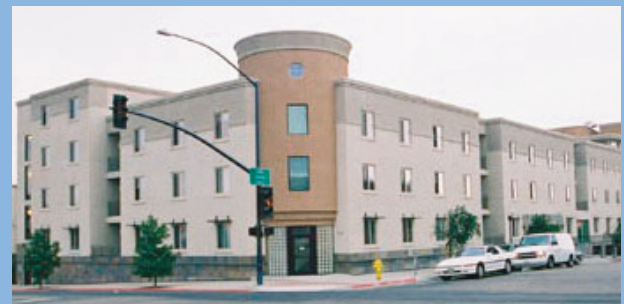


Is Mixed-Population Housing a Solution to Homelessness?



Prepared by
Shelter Partnership, Inc.
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ABOUT SHELTER PARTNERSHIP, INC. AND BRIDGE HOUSING CORPORATION

Established in 1985, Shelter Partnership is a non-profit organization committed to ending homelessness of men, women and children in Los Angeles County through the development of short-term and permanent housing and resources. Shelter Partnership also works toward reducing the risk of homelessness. We accomplish our mission through three major activities: providing technical assistance and support to community-based organizations that develop housing; undertaking major studies on homeless populations and the systems that serve them, which inform and motivate changes in public policy; and operating the S. Mark Taper Foundation Shelter Resource Bank program that has secured more than \$160 million in new goods for people who are homeless and people who are living in poverty.

This report is intended to further the understanding of Developers, Property Managers, social service agencies, and public officials on the efficacy of developing mixed-population housing specifically for both formerly homeless and low-income households.

We undertook this study at the request of BRIDGE Housing Corporation as part of their 25th year celebration. BRIDGE creates high-quality, affordable homes for working families and seniors. With over 13,000 homes and counting, BRIDGE has become the leading affordable housing Developer in California. BRIDGE builds many housing types that not only fit comfortably into their surroundings, but also act as catalysts for revitalizing and strengthening neighborhoods.

You can learn more about Shelter Partnership, as well as our other publications, at our website www.shelterpartnership.org. BRIDGE can be accessed on the Internet at www.bridgehousing.com.

ACKNOWLEDGMENTS

We thank the Developers, Property Managers, service providers, and all of the other interviewees who took precious time from their busy schedules to help inform this study. We particularly appreciate the Developers who gave generously of their own time and facilitated access to their staff and partners: Martin Dunn, President, Dunn Development Corporation; Lee Milman, Director of Housing & Development, A Community of Friends; Steve Coe, Executive Director, Community Access; Paul Downey, President & CEO, Senior Community Centers; and Gary Frazier, Acacia Housing Advisors. All interviewees are listed in the Appendix.

We offer special thanks to the tenants who participated in our focus groups and whose thoughtful candor enriched this study.

The primary researcher was Steve Renahan, Senior Policy Advisor, who participated in all of the interviews. Other staff who contributed were Ruth Schwartz, Executive Director; Nicky Viola, Senior Project Manager; and Dhakshike Wickrema, Project Manager. Rhonda Villanueva, Development Associate, designed the cover.

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Is Mixed-Population Housing a Solution to Homelessness?

I. INTRODUCTION

A. Goals of This Paper

This report is intended to further the understanding of Developers, social service agencies, property managers, and public officials on the efficacy of developing mixed-population housing specifically for both formerly homeless and low-income households. We hope this report answers many questions as well as raises new questions that stakeholders were not even aware they had.

B. Literature Review

Whereas much has been written about mixed-income housing, we were able to locate a paucity of literature on providing housing for formerly homeless households with low-income households. We believe that a brief review of research on mixed-income housing will inform discourse on our study populations.

1. Mixed-Income Housing

While there is no formal definition of the term “mixed-income,” in general, it denotes a concerted effort to produce a housing development with a mix of income groups (Brophy and Smith, 1997; Khadduri and Martin, 1997; Smith, 2002).

Mixed-income housing has been described as a response to the increasing social and economic isolation of residents housed in low-income neighborhoods (Schwartz and Tajbakhsh, 1997; Brophy and Smith, 1997; Smith, 2002). A confluence of events and circumstances that included the construction of the highway system, middle-class flight to the suburbs and government policies that targeted subsidized housing exclusively to those with very low incomes, conspired to concentrate the poor in already underserved urban communities (Wilson, 1987; Smith 2002). The embrace of mixed-income housing also acknowledged the fiscal and managerial difficulties involved with “warehousing the very poor in large developments” (Schwartz and Tajbakhsh, 1997). Dispersal, in the mode of portable tenant vouchers, and integration, in the form of mixed-income developments, were policy choices that attempted to reverse the negative effects of poverty clusters (Schwartz and Tajbakhsh, 1997; Khadduri and Martin, 1997; Cisneros, 1995; U.S. Department of Housing and Urban Development, 1995; Smith, 2002).

Schwartz and Tajbakhsh (1997) identified four general groups of mixed-income housing borne of public and private incentives: (1) land-use regulations, such as density bonuses and inclusionary zoning ordinances, that encouraged developers to reserve a percentage of new units for low-income households; (2) public housing projects that strongly promoted mixed-income housing through federal strategies such as the HOPE VI program; (3) state and local housing funding guidelines that required a percentage of units set-aside for low-income residents; and (4) like-minded agencies and developers that crafted mixed-income housing using a variety of funding sources, such as Federal Low Income Housing Tax Credits and federal block grants.

Some authors further categorized mixed-income housing according to the blend of incomes targeted by the development: (1) moderate-income inclusion (primarily market-rate units but includes moderate-income units); (2) low-income inclusion (development with primarily market-rate units but includes low-income units); (3) broad range of incomes (development with market-rate units, moderate-income or low-income units and extremely low-income units); (4) market-rate inclusion (development with primarily low-income units but includes market-rate units); (5) affordable mix (development with moderate-income or low-income units and extremely low-income units) (Khadduri and Martin, 1997; Smith, 2002).

A review of the literature revealed the underlying concern that mixed-income housing would not appeal to moderate-income households or that moderate-income tenants would be dissatisfied. However, in cities with strong housing markets and a shortage of affordable housing, such as New York, mixed-income housing successfully attracted moderate-income households in addition to formerly homeless and low-income households (Schwartz and Tajbakhsh, 1997). Similarly, in a quantitative study of a Chicago Housing Authority mixed-income development, Rosenbaum et al. (1998) found that the project had successfully attracted moderate-income residents and, following several years in operation, was considered well-managed by tenants.

Mulroy (1991) established that, in three cities, the determining factors for tenants choosing to live in market rate units in mixed-income housing were location and development quality. After looking at seven case studies of mixed-income housing across the nation, Brophy and Smith (1997) surmised that mixed-income housing tended to succeed when the nature and quality of units were the same for residents of all income levels and the income mix was de-emphasized during marketing of the units.

A landmark study by Ryan et al. (1974) of the pioneering mandate of the Massachusetts Home Finance Agency to achieve economic and population integration in its housing projects concluded that tenant satisfaction was unrelated to the income and/or population mix but strongly related to the quality of the development's design, construction and management. Expanding on the importance of development quality, Brophy and Smith (1997) emphasized real estate rudiments such as location, design, management and maintenance, as well as financial viability, if a mixed-income project was to achieve its goals.

2. Mixed-Population Housing

Mixed-population housing may be seen as a special set of mixed-income housing. In these types of housing, in addition to a variety of incomes, there may also be units set aside for certain populations such as seniors, those with mental illness or developmental disabilities, youth, or residents who were formerly homeless. Mixed-population housing may also be called mixed-occupancy housing, mixed-tenancy housing or mixed-model housing. In certain instances, mixed-population housing may be referred to as "integrated" supportive housing, as opposed to "stand-alone" supportive housing (Supportive Housing Network of New York, 2006). Supportive housing may describe any housing approach that incorporates support services (Lipton et al., 2000) but in the affordable housing field, it frequently refers to affordable housing

that provides on-site services to tenants who may need support to live independently (Furman Center, 2008).

Authors agreed that mixed-income housing and mixed-population housing were tools that could be used to overcome NIMBYism as working families and other moderate-income households might benefit from affordable housing in their communities (Smith, 2002; Supportive Housing Network of New York, 2006). In fact, a recent New York City study established that properties located near supportive housing developments increased in value over time relative to other properties in the neighborhood (Furman Center, 2008).

A case study of a mixed-population (25% of units set aside for formerly homeless families in addition to low income families earning more than 50% of Area Median Income and very low-income families earning less than 50% of Area Median Income) development in Vista, San Diego County, California, revealed that the ongoing profitability of the property was aided by the high cost of homeownership in the area and the lack of other affordable rental housing options. Furthermore, the project contained conditions for success that were identical to those corresponding to success in mixed-income housing, such as desirable location, design quality and steady asset management (NeighborWorks, 2005).

Over the next 10 years, the New York New York III Agreement hopes to generate 9,000 new supportive housing units for chronically homeless and at-risk individuals and families in New York City. The Supportive Housing Network of New York recommends a mix of tenants with different disabilities and backgrounds as well as making housing units available to residents in the immediate vicinity of the development. Furthermore, they recommend moving away from varied reimbursement rates based on disease diagnosis such as mental illness or HIV/AIDS. Instead, they suggest an innovative 3-tier reimbursement rate model that would allow all providers to provide comparable services depending on whether a tenant had one disability, two disabilities or was part of a family coping with a disability (Supportive Housing Network of New York, 2006).

II. METHODOLOGY

A. Case Study Approach

We chose a case study approach to take advantage of the real life experiences of *Developers* who have chosen to mix populations in affordable buildings. We reviewed the history of the development of these buildings and investigated their successes and problems. Exhaustive interviews with the *Developers*, *Property Managers*, services providers, and tenants themselves yielded in-depth assessments. Thus, we were able to learn how mixed-population housing has worked in practice, benefit from thoughtful reflection on the parts of key personnel, and develop themes consistent among the buildings.

B. Selection Criteria

Shelter Partnership scanned the national landscape of communities in which mixed-population permanent housing for formerly homeless and low-income households had been developed. We conducted Internet research, and spoke with local and national experts, including staffs of the Corporation for Supportive Housing and the National Alliance to End Homelessness, as well as authorities in the cities of Seattle and New York.

We were interested primarily in developments that utilized 9% Federal Low Income Housing Tax Credits and were open at least two years, which would allow enough time for tenants to have adjusted to living together and also allowed the *Developers* to have assessed property management and services issues and to have made adjustments, thereby allowing for richer analysis.

We selected buildings with at least 40 units to allow valid group sizes for the homeless and general populations and where at least one-third of the tenant households were formerly homeless.

In all, five developments were selected: three in California—one each from Los Angeles, Orange, and San Diego Counties—and two developments in the Bronx of New York City. Basic data for the five projects are summarized here:

Table 1: Characteristics and Populations of the Selected Developments

Housing Development	1212 MLK Apartments (Bronx)	Amistad Apartments (Los Angeles)	1363 Franklin Ave (Bronx)	Potiker Family Senior Housing (San Diego)	Tyrol Plaza Senior Apartments (Anaheim)
Total Units	54	49	66	200	60
Manager Units	1	1	1	2	1
Homeless Units	17	12	44	About 100	18
Target Population	Working Families, Homeless Individuals with Disabilities, and Persons with Developmental Disabilities	Low-income families	Working Families and Homeless Individuals with Mental Disabilities	Older Adults	Older Adults
Units for Disabled	17 and 10 for Developmentally Disabled	21, including 12 homeless	44		12
Occupancy Date	6/06	2/03	6/05	8/03	9/04
Services Funding Source	Section 8 Voucher Surplus	Formerly SHIA ¹ ; now County of Los Angeles Homeless Prevention Initiative (HPI)	City of New York Homeless Services Department	Fundraising	SHP; Project budget
On Site Services Staffing	Part Time (24 Hours per Week) Licensed Clinical Social Worker/ Aftercare Case Manager	One Full Time Resident Services Coordinator	2 Full Time Service Coordinators, 1 Full Time Program Director, 5.2 Full Time Receptionists (24/7), Half Time Nurse Practitioner, Part Time (.2) Psychiatrist	One Full Time Resident Services Coordinator; One Full Time Older Adult Rehabilitative Specialist; Part Time (8 Hours per Week) RN; Part Time (8 Hours per Week) Psychiatric Nurse	Full Time Resident Services Coordinator; Part Time (24 Hours per Week) Case Manager
Rent Subsidy	Tenant-based Section 8 Vouchers from New York City Department of Housing Preservation and Development; New York State Office of Mental Retardation & Developmental Disabilities Operating Subsidies	Operating Subsidy from State of California Supportive Housing Initiative Act (SHIA) ¹	New York City Department of Homeless Services; New York City Department of Health & Mental Hygiene	Expect 30 Project-Based Section 8 Vouchers soon	Project-Based Section 8 Vouchers for 35 units and Tenant-Based Section 8 for most of the rest

¹ Between 1998 and 2003 the California Statewide Supportive Housing Initiative Act (SHIA) funded both supportive services and housing operations for very low-income adults having one or more disabilities, half of whom were homeless. Service funding was for three years, while operating subsidies were for ten years.

C. Questionnaires

Shelter Partnership developed five questionnaires, all of which are in the Appendix. The first two questionnaires were for the Property Management and Social Services staffs, which were administered generally by telephone, but also in person. In all cases, the staffs received the questionnaire in sufficient advance of the interview. The next two questionnaires were of the formerly homeless tenants and the other affordable housing tenants. At all times, these focus groups were conducted in person. In the case of these four questionnaires, generally two staff people from Shelter Partnership were involved in the interviews to facilitate understanding and note taking.

The final interview was of the Executive Director of the agency operating the development to query them on some final thoughts as well as ask any outstanding questions.

Following is a general description of the interview questions.

D. Interviews with Property Managers

The Property Manager survey instrument included 54 questions in six sections:

1. General Information
2. Property Management Staffing and Services
3. Leasing
4. Property Management Issues
5. Supportive Services
6. Recommendations for Developers

E. Interviews with Service Providers

We attempted to jointly interview on-site service providers and their program directors, and were successful in three cases. In two others, we interviewed only on-site direct service providers.

The service providers survey instrument included 36 questions in six sections:

1. General Information
2. Description of Homeless Population
3. Services
4. Staffing
5. Other Services-Related Questions
6. Recommendations for Developers

F. Focus Groups with the General Population

We asked each Developer to schedule a focus group of six to ten tenants from the general population (i.e. residents of the affordable housing units) that we estimated would take 90 minutes. We asked that prospective participants be told that we were researching affordable

housing and services in affordable housing and that each participant would be given a gift bag of personal care items. We also offered toys to parents in the three buildings with children. In one case, the Developer also offered cash payments to those tenants that participated.

We asked the general population focus groups 16 questions in four sections:

1. General Information
2. Activities and Services
3. Impressions of other Tenants
4. Recommendations for Developers

G. Focus Groups with the Formerly Homeless

We asked each Developer to schedule a focus group of six to ten tenants from the formerly homeless population that were again intended to last no more than 90 minutes. As with the general population, we asked that prospective participants be told that we were researching affordable housing and services in affordable housing and that each participant would be given a gift bag of personal care items. We also offered toys to parents in the three buildings with children and again one of the Developers provided participants with cash payments.

We asked the formerly homeless population focus groups 11 questions in four sections:

1. General Information
2. Activities and Services
3. Impressions of other Tenants
4. Recommendations for Developers

H. Interviews with Developers

Upon completion of all other interviews and focus groups, we interviewed by telephone the Developers to clarify issues raised in the interviews and focus groups and to ask the questions:

1. Why did you develop a mixed population building?
2. Why did you choose to mix populations rather than developing a 100% special needs building?
3. Would you develop another mixed population building?
4. If so, what would you do differently?

III. CASE STUDIES

- **MLK Apartments (1212 MLK)**
- **Amistad Apartments (Amistad)**
- **Franklin Avenue Apartments (Franklin)**
- **Potiker Family Senior Housing (Potiker)**
- **Tyrol Plaza Senior Apartments (Tyrol)**

1212 MLK Apartments

Bronx, New York

Dunn Development Corp.

The Organization

Martin Dunn founded Dunn Development Corp. in 1998, and has since been involved in the development of more than 1,000 units of new housing. Dunn Development Corp., a for-profit real estate and development firm, builds traditional low-income housing projects and specializes in creating model housing projects for underserved communities to be operated by non-profit partner organizations. Dunn Development Corp. has developed an expertise in producing projects with supportive or service-enriched housing components within multifamily apartment buildings, pioneering the integration of people with special needs in mainstream settings. Dunn Development Corp. is currently developing innovative initiatives to serve the homeless, people with psychiatric disabilities, people with developmental disabilities and ex-prisoners. The firm has extensive experience using numerous City, State and Federal funding programs for affordable housing. Dunn Development Corp. is also at the forefront of sustainable development and is incorporating high performance standards and green building technology into each of its projects.



The Project

Located at 1212 Martin Luther King Jr. Blvd in the Highbridge section of the South Bronx, the six-story, 54-unit building was funded largely by 9% Federal Low Income Housing Tax Credits and opened in June 2006. It is close to public transportation and retail establishments.

At 1212 MLK Apartments, ten studio apartments are leased to adults with developmental disabilities who are living independently for the first time. Extensive 24-hour on-site services are provided to these residents by The Center for Family Support (CFS), a non-profit agency that works with the developmentally disabled. An additional seventeen units are leased to formerly

homeless families referred from the New York City shelter system. Services to help these families transition from the shelter system and be successful in independent housing are being provided by Volunteers of America. These tenants are eligible for Section 8 Vouchers provided by the New York City Department of Housing Preservation and Development and pay 30% of their income towards rent, with the Section 8 Voucher covering the balance. The remaining twenty-six units were targeted to non-special needs working families, more than half of whom came from the local community, creating a truly integrated setting and an innovative alternative to group homes and other buildings that are 100% special needs. The units designated for the three population groups are distributed throughout the building.

All building residents have initial incomes below 50% of Area Median Income (AMI), which means a family of four must have an annual income of less than \$35,450. Twenty-six units are leased to working families, more than half of whom were already residents of the local Highbridge neighborhood at rents of \$535 per month for one-bedroom apartments and \$645 per month for two-bedroom apartments.

In addition to the services provided for the special needs populations, Beulah HDFC, Inc., one of the co-developers of the project, runs meetings and trainings in an effort to encourage all building residents to become active participants in the building and in the surrounding neighborhood. One gratifying aspect of this is the extent to which all building residents – regardless of background or financial status - interact at building activities as neighbors.

The *Developer* reported that he chose to mix these populations at 1212 MLK because the New York State Federal Low Income Housing Tax Credit competition gave more points to projects that set aside at least 15% of units for special needs tenants. However, the *Developer* said that he chose to go well beyond the 15% because he believes it is important to try new models to help people to live independently. The *Developer* included the developmentally disabled units because the State asked and it made financial sense.

The *Developer* said that there was no community opposition to this project. In his experience, communities are biased against 100% special needs projects, but mixed-population buildings are viewed as other affordable projects. The only concern is that the product be nice. And the *Developer* believes in producing such buildings; he believes that tenants are proud of living in good quality buildings and therefore protect the property.

Physical Features

The six-story, 52,127 square foot security building includes a community room, laundry room, two elevators, live-in superintendent, and a 1,400 square foot first floor office suite with three offices plus waiting area for on-site social service providers. A 5,000 square foot landscaped backyard includes a children's play area with a safety surface.

The two bedroom units average 814 square feet, the one-bedroom units 601 and the studios 468. The units for the formerly homeless tenants are distributed throughout the building.

The building is located in a high-density area and fits in well with its surroundings, through the use of a brick façade similar to the surrounding buildings, while including distinctive design elements, such as an ornate front façade with concrete bands, headers, and window surrounds and a historic-style cornice.

The project incorporated many energy-saving and green building features to increase the building's energy efficiency and lower both building operating expenses and tenant-paid utilities.



Tenant Characteristics

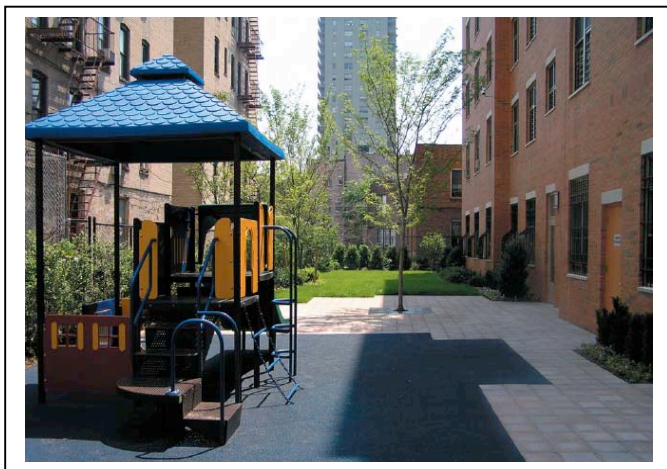
All building residents have initial incomes below 50% of AMI, or an annual income of less than \$35,450 for a family of four. Twenty-six units are leased to working families—more than half of whom were already residents of the local Highbridge neighborhood.

Seventeen units are leased to formerly homeless households referred from the New York City shelter system, twelve families with children and five single adults. The on-site case manager reported that all of these tenants were chronically homeless, often living for years in New York City shelters. He said that they do not maintain statistics on disabilities or substance use. With eleven of the 17 formerly homeless households in rent arrears, the case manager believes that the

single most important problem for the formerly homeless tenants is poverty, but that disabilities and substance use may be issues as well. These rent arrearages have not yet had a major impact on the financial stability of the project, largely because the payments for the Section 8 Voucher subsidies and the master lease funded by the New York State Office of Mental Retardation and Developmental Disabilities for the ten adults with developmental disabilities are made directly. Still, bringing rent collections current is the primary focus of the on-site case manager (see below).

Ten studio apartments in the building house adults with developmental disabilities with initial incomes below 30% of Area Median Income. The residents of these ten units were selected by The Center for Family Support (CFS) based on their ability to live and thrive in a more independent environment. Many of these residents moved to the building from group homes and for a number of them it marks the first time in their lives that they are living alone. On-site CFS staff assist these ten adults, many of whom work during the day, and arrange educational and recreational activities for these residents.

Requirements are the same for new applicants as for the original lease-up, so there has been no change in the composition of the tenant population with regard to the targetted populations.



Property Management Staffing

Prestige Property Management provides property management services at 1212 MLK Apartments. A full-time *Superintendent* lives in a two-bedroom unit. A full-time *Property Manager* and a full-time *Assistant Property Manager* also staff the building. A *Site Manager* with responsibility for many buildings supervises the on-site staff and was interviewed for this case study.

Property Management and Leasing

Different application processes are employed for the three populations. Prestige Property Management conducts outreach for the general population, takes applications, and conducts a lottery to determine the order in which applicants are considered. General applicants must meet the income restrictions and standards for credit and prior tenancy history.

Homeless applicants are referred from the New York City shelter system, with six or seven referred per vacancy. Prestige Property Management interviews, conducts a briefing session, and tries to judge if the applicant is ready for independent living. Prestige is flexible with respect to credit and tenancy histories, much more so than with the general applicants. Similarly, Prestige is flexible with criminal background screening, and does not exclude homeless applicants with convictions, including drug convictions, if the City caseworker can substantiate there has been an improvement. Independent of Prestige's screening, homeless applicants must meet the requirements of the New York City Department of Housing Preservation and Development Section 8 Voucher Program, which includes exclusions for certain criminal histories.

The Center for Family Support (CFS) has a master lease for 10 studio apartments and first-floor office space in support of ten tenants living with developmental and related disabilities. Under the master lease, CFS has responsibility for determining which of its clients become tenants at 1212 MLK Apartments.

In comparing the general and formerly homeless applicants, the *Site Manager* reports that similar percentages of applicants are screened out of the process (45% of homeless applicants and 55% of the general applicants), but that general applicants are much more likely to drop out of the process (15% of general applicants drop out, vs. 5% of homeless applicants).

Prestige Property Management informs applicants that the building has mixed populations, but has not had any applicants withdraw from the process because of that.

Property Management Challenges

The *Site Manager* reports that most of the issues confronting property management staff involve the formerly homeless tenants, and those issues explain the staff to tenant ratio of 1:18, an unusually low ratio for rental housing. In fact, if the building housed only general population tenants, the *Site Manager* would need fewer on-site staff. The *Site Manager* said the most challenging property management issues relating to formerly homeless tenants, in order of frequency, are:

1. Non-payment of rent,
2. Unable to live independently,
3. Drug/alcohol-influenced behavior,
4. Unauthorized guests,
5. Disturbing other tenants,
6. Clutter, and
7. Pet violations.

The *Site Manager* explains that most of the property management issues relate to the problem of non-payment of rent and other lease violations by many of the formerly homeless tenants. The *Site Manager* suggests that because of their extremely low incomes and long shelter stays, these tenants often do not put aside money for rent. They are not accustomed to budgeting and prioritizing their money. Recently, tenants behind in rent say their other costs, particularly food, are increasing.

Evictions of the formerly homeless tenants who do not pay rent take longer and are more time-consuming and expensive than evictions of general tenants. The New York Court system gives low-income people second chances and often directs property managers to come up with work-out plans. Frequently, these cases are extended because the Court requires government program representatives to come to court to explain the rules of programs such as the Section 8 Voucher or Public Assistance to the Court. In fact, it takes about six months to settle with or evict a homeless tenant as compared to two to two and one-half months for other tenants. Throughout that process, attorneys must be paid for court appearances.

The *Site Manager* has taken two former tenants through this process to eviction, but the *Developer* and *Site Manager* determined that a better approach to the rent arrearage problem would be to staff a *Case Manager* to assist tenants in addressing the issues that lead to the arrearages. On-site supportive services for the formerly homeless tenants had been part of the original plan for the building, but there had been a delay in staffing. The *Developer* resolved this by contracting with Volunteers of America to provide a part time (24 hours per week) *Case Manager*. The efforts of the *Case Manager* to preserve tenancies are described below.

In addition to the rent payment issues, the *Site Manager* reports that both formerly homeless and general population tenants sometimes bring in unauthorized guests or present problems with clutter. However, some formerly homeless new tenants require more attention for issues that do not arise with other tenants, such as inability to live independently, disturbing other tenants, drug or alcohol-influenced behavior, and pet violations.

Despite the rent payment issues, no tenants use representative payees and management has not encouraged tenants to use a representative payee, although they do encourage tenants to open bank accounts.

Supportive Services Staffing

Volunteers of America – New York (VOA) made referrals to 1212 MLK during the initial lease-up and was recently contracted as the lead service provider. VOA provides a *Licensed Clinical Social Worker/Aftercare Case Manager (Case Manager)* to provide support for all 17 formerly homeless households. The *Case Manager* works 24 hours per week, Monday through Friday evenings and Saturday. The *Case Manager* is focusing on rent payment issues, which he believes can be remedied if tenants receive the public benefits to which they are entitled. He looks forward to making referrals offsite for education, training, employment, and vocational services, once the tenants are caught up on rent.

The project budget is adequate to fund the *Case Manager* position because the formerly homeless tenants come to the project with Section 8 Vouchers from the New York City Department of Housing Preservation and Development. The project is budgeted to meet its operating and debt service obligations with income equal to the “Tax Credit rent.” The Section 8 Vouchers subsidy plus the tenant rent exceeds the Tax Credit rent, so the project uses that surplus to fund the *Case Manager* position.

Some of the formerly homeless tenants also receive some aftercare services from *Social Workers* from the shelters that referred them to 1212 MLK Apartments.

While the ten adults with developmental disabilities receive 24/7 on-site support from The Center for Family Support, the general tenants have no supportive services targeted to them on-site. The *Case Manager* indicates that he is available to make referrals for general population tenants upon request. The *Site Manager* reports that there have been no issues among the general tenants over their exclusion from services provided on-site for the two special needs tenant groups.

Supportive Services

Seventeen units are leased to formerly homeless individuals and families referred from the New York City shelter system. Prestige Property Management and the owner concluded that the formerly homeless tenants needed supportive services to preserve their housing. Accordingly, in 2008 they funded the Volunteers of America to increase the social services effort from intermittent services off-site to a scheduled, part-time on-site *Case Manager* six days per week.

The priorities they established for the *Case Manager* were:

1. Eviction prevention,
2. Budgeting and planning coaching,
3. Referrals for rental assistance and other services,
4. Career and job development, and
5. Help with City agencies.

Because many tenants cite other expenses as the reason they do not pay rent, the new *Case Manager* is initially focusing on helping the formerly homeless families secure entitlements, such as Food Stamps, so they will be more likely to have money for rent. (The *Case Manager* reported that most tenants were of the mistaken belief that they do not qualify for Food Stamps.) Because qualifying for and keeping Section 8 Voucher Rental Assistance and Public Assistance requires follow-through and at least annual recertification of eligibility, the *Case Manager* helps the formerly homeless families comply with instructions and keep appointments. The *Case Manager* also coaches on individual household issues, such as budgeting and prioritizing.

The *Site Manager* believes that the 24 hours per week of staffing provided by the part-time *Case Manager* will prove sufficient to remedy the rent arrearages and support long-term, successful tenancies.

The newly-staffed *Case Manager* provides on-site case management and assistance with getting and retaining entitlements for the 17 formerly homeless households. Currently, these functions occupy almost all his time. Once the rent arrearage problem has been remedied, the *Case Manager* plans to develop individual career and job development plans for each member of the formerly homeless families and make referrals to other organizations for education, training, employment and vocational services, food, meals, nutritional counseling, legal assistance, medical care, mental health counseling and treatment, substance abuse counseling and treatment, support groups/non-professional counseling, and transportation.

Of the services provided, the *Case Manager* believes the most important in supporting long-term successful tenancies, in order of importance, are:

1. Medical/Heath Services
2. Substance Abuse Services
3. Transportation
4. Money Management

The *Case Manager* believes the location of his office is ideal, because it is accessible on the first floor, but people do not see each other come and go, maintaining a confidentiality that is important to many of his clients.

Ten studio apartments house adults with developmental disabilities, with 24-hour on-site services provided by the non-profit Center for Family Support. CFS staff assist these ten adults, many of whom work during the day, and arrange educational and recreational activities. The New York State Office of Mental Retardation and Developmental Disabilities provides funding for rent subsidies and services for these tenants.

Service Efficacy

Both the *Site Manager* and the *Case Manager* believe that the *Case Manager* will prove essential to long-term, successful tenancies among the formerly homeless tenants, most of whom, on their own, have been unable to avoid rent arrearages. The formerly homeless focus group confirmed that the *Case Manager* has been effective in helping them with Food Stamps and access to food pantries, which has made it easier to pay the rent.

The *Case Manager* cites as evidence of the success of the services program that there is no graffiti and no one is hanging out on the front door stoop.

Tenant Satisfaction

While the formerly homeless tenants were satisfied with the new *Case Manager* for showing concern and being accessible, they felt there should be more activities for tenants, especially an after-school program for children. They also were troubled by the fee charged to use the community room.

The general tenants' focus group said that the special needs tenants had many services available to them, but described the activities open to them as "limited:" the only activity they could recall that included all tenants was an Easter event. They appreciated the secure playground in back for the children, but would like to have an after-school program and other activities for children on-site. In addition, the general tenants' focus group said that they would like on-site career assistance, free flu shots, a TV in the community room, a movie night, and activities for senior citizens and people with disabilities, who, they said, get lonely.

Both groups were highly satisfied with the resident *Superintendent*, who responds quickly to maintenance requests and unfailingly treats tenants with respect.

Mixed-Population Issues

Both focus groups reported that most of their neighbors in the building are good neighbors. However, both groups reported that specific floors suffered from noisy tenants. Both focus groups recalled formerly homeless individuals panhandling aggressively in the halls, which they believed to be an attempt to get money for drugs, and said that Prestige Property Management is dealing with this issue. One general population tenant said that children should not be allowed to run in the halls. Neither group generalized these behaviors as typical of the homeless. No conflict or prejudice toward the formerly homeless tenants was reported.

Both groups recalled being told about the developmentally disabled tenants and formerly homeless tenants when they were interviewed prior to leasing. They said that they had no apprehension about living in a building with special needs tenants, and still have no concerns.

The formerly homeless focus group recounted negative experiences in the shelters, but said they had experienced no discrimination or stereotyping at 1212 MLK Apartments.

The *Developer* reported that some of the formerly homeless families have emerged as leaders in the building, organizing activities such as a Halloween event.

Recommendations from Tenants and Staff

The *Case Manager* says that the recent experience at 1212 MLK Apartments demonstrates the importance of having good property management that understands it takes time to work with the tenants and is not too quick to take tenants to rental court. Property management must understand that rent is not the tenants' first priority, but that eviction is not the solution. Instead, property management should involve the *Case Manager* to resolve the issues that lead to non-payment of rent. Of course, that means it is important to have services staff available. The *Site Manager* agreed that it is important to have services available from the day the project opens.

Both tenant focus groups spent much time on security issues. Both like that 1212 MLK is a security building requiring a key for entry from the street, but both groups would prefer more security cameras, a security guard to monitor the cameras, and a closed circuit TV system so they can see who is buzzing them from the front door. (Many tenants have seen such systems in other New York buildings and referred to them as "Channel 3" systems.) The formerly homeless

tenants described the violence they witnessed in emergency shelters, which may partly explain their concern with security.

The formerly homeless focus group commended the size of the units, motion-activated hall lights, and having two elevators. They would like less expensive laundry facilities, a larger play area for children, and more *Case Manager* hours during the day.

The *Developer* reports that he has used a range of mixed population models and found that many approaches can work. For example, 1212 MLK does not have a 24/7 front desk, while some of his other buildings do. He particularly supports including working families with children, because, “Children change the dynamic. It’s natural to have children around, and it makes people feel good.”

Funding

1212 MLK Apartments was developed at a total cost of \$10.5 million. The permanent funding and operating subsidy sources are:

	SOURCES	AMOUNTS
9% LIHTC Equity	New York State Division of Housing and Community Renewal - Tax Credit equity from Fannie Mae through Richman Housing Resources	\$6,461,000
Loan – Mixed Income Rental Program (1%, interest only, 30-yr term)	New York City Dept. of Housing Preservation & Development (NYC HPD)	\$2,538,000
Loan – Hard Debt	The Community Preservation Corporation	\$975,000
ENERGY STAR pilot program	New York State Energy Research and Development Authority	\$200,000
Deferred Developer Fee	Developers	\$344,872
Operating Subsidies for 17 families	Tenant-based Section 8 Vouchers from NYC HPD	Varies for both rental and service.
Operating Subsidies for 10 units	New York State Office of Mental Retardation & Developmental Disabilities	Varies for both rental and service.

New York State subsidies include an annual allocation of \$766,900 in Federal Low Income Housing Tax Credits from the New York State Division of Housing and Community Renewal (DHCR) and \$200,000 in design and construction grant funding from the New York State Energy Research and Development Authority as part of its ENERGY STAR pilot program. Local subsidies include a \$2,538,000, 1% interest, non-amortizing loan from the New York City Department of Housing Preservation and Development (HPD) as part of its Mixed Income

Rental Program (MIRP). As part of MIRP, HPD has provided a rental subsidy in the form of tenant-based Section 8 vouchers to 17 resident families who were formerly homeless.

The case management services from Volunteers of America - Greater New York are funded through a social services reserve funded by a portion of the Section 8 rents. Because the combination of the Section 8 subsidy and tenant rents are higher than the Federal Low Income Housing Tax Credit rents projected in the *pro forma*, the difference is available to fund services. The *Developer* reported that the City Department of Housing Preservation and Development (HPD) approved of this approach when it agreed to provide Section 8 Vouchers.

The New York State Office of Mental Retardation and Developmental Disabilities provides funding for rent subsidies and services for these ten adults with developmental disabilities.

All of the units except the manager's unit are restricted to incomes below specified percentages of Area Median Income (AMI): 43 units at 50% of AMI and 10 units at 30% of AMI.

Amistad Apartments

Los Angeles, California

A Community of Friends

The Organization

A Community of Friends (ACOF), a non-profit development organization, has been developing permanent, affordable housing for individuals and families with special needs since 1988. To date, ACOF has completed over 1,225 units in 33 properties of which 28 remain in the agency's portfolio. The majority of ACOF's developments are located in Los Angeles County, with some additional projects in Orange County and San Diego. The agency provides its homeless, disabled, and very low-income residents with supportive services through collaboration with community-based social service agencies. ACOF often maintains a significant presence in the projects it develops by performing various management functions.



The Project

Open since 2003, Amistad Apartments is a 49-unit apartment complex for families with children located in the Lincoln Heights area of Los Angeles. The development is located in a primarily multi-family residential neighborhood, one block away from a large municipal park and close to the USC Medical Center Campus. As such, the property fits in well with its surroundings.

The four-story building is 55,000 square feet and includes ample common space, office space, and an independently-operated childcare center. A Community of Friends acts as the lead service provider for Amistad's residents.

Amistad is comprised of five one-bedroom units, 24 two-bedroom units, and 20 three-bedroom units. The manager resides in a two-bedroom unit. Twelve units are reserved for formerly homeless families with special needs, nine units for families with special needs, while the remaining 27 house low-income families. The formerly homeless households occupy a variety of unit sizes, while the low-income families predominantly live in two- and three-bedroom units.

Of the 36 non-homeless units, twelve are reserved for households at 50% of AMI, 11 for 40% of AMI, four for 35% of AMI, and nine for 30% of AMI. In 2008, 50% of AMI income limit for a four-person household in Los Angeles County, California, was \$37,900. The 12 formerly homeless families benefit from an operating subsidy that makes their rent affordable.

The *Developer* chose to mix populations in Amistad because the need for affordable housing in the community is so strong that they felt confident that the community would not oppose housing special needs tenants in the building.

Physical Features

Amistad Apartments is designed with the apartments surrounding a central courtyard area, with a community room situated in the center of the space.

The common space includes 19,000 square feet of exterior space consisting of three courtyards and a garden area. The building features a community room with kitchen, a computer room, a laundry room and two case management offices. An independently-operated child care center serving 48 children from the community is also located on-site. The design provides significant outdoor and common space for the children to play while being monitored by parents.

The five one-bedroom units are 600 square feet, the 24 two-bedroom units are 1,000 square feet, and the three three-bedroom units range from 1,100 to 1,450 square feet. The development includes a 56-space parking garage.

Amistad is a security building, and has a security guard on patrol regularly.



Tenant Characteristics

All residents of Amistad are low-income families with children. The twelve formerly homeless households also have a family member with a disability. Staff estimates that 80% of the formerly homeless households have a mental illness and 20% have a co-occurring mental illness and substance abuse issue.

Tenant focus group participants described various prior living situations including homeless shelters, hotels, other affordable housing developments, and overcrowded living situations. According to property management, 60% of formerly homeless households previously lived in a transitional housing program, 30% in a shelter, and 10% on the streets.

Property Management Staffing

The John Stewart Company provides property management services at Amistad. A full-time *Resident Manager* lives on-site and is assisted with maintenance issues by a *Maintenance Worker* who is at the property for 16 hours per week. The property is supervised by a *Regional Manager* who is responsible for 12 – 20 John Stewart Company-managed properties.



Property Management and Leasing

Applicants for the 21 special needs units are referred to the property by various service providers, including Beyond Shelter, Housing WORKS, Jovenes, The Salvation Army, and Union Station. The low-income units are filled by walk-ins from the community and through the property management company's internal mechanisms.

While the source of referrals for vacant units varies based on the population, the application process itself is basically identical for all applicants. The special needs units require verification of a disability and homelessness, if applicable, but otherwise complete the same application process as the strictly low-income units. Specific units are not reserved for either group of tenants.

Property management staff did report that homeless applicants are more likely than other applicants to drop out (20% versus 10%) or be screened out (20% versus 10%) of the leasing process. The higher rate of dropping out is primarily due to the difficulty in maintaining contact with the applicant throughout the process. The property manager has found, however, that working closely with the referring agency's case manager alleviates many of the problems. The *Case Manager* is then better able to track the client and can help the applicant complete the application and ensure that all required documents are included.

Since Amistad provides housing to families with children, the criminal background screening requirements are more stringent than for their other properties. Accordingly, applicants with violent felonies or sex offenses on their record are not permitted to lease units. Property management has found that such criminal background issues are more common with homeless applicants.

According to the Property Manager, applicants are not notified up front that other Amistad tenants are formerly homeless. In the rare instances that the issue of different tenant backgrounds arises, applicants are told that some units are reserved for families with special needs.

Some of the tenants in both focus groups reported knowing during the application process that a portion of tenants had special needs. In some cases, this disclosure seems to have occurred through the referring agency. The fact that some tenants were formerly homeless does not appear to have been disclosed during the leasing process. While some tenants did share that they were initially concerned about living in close proximity to persons with special needs, none reported any ongoing concerns once they moved into their apartments.

Property Management Challenges

The *Property Manager* reports that the formerly homeless tenants do tend to require more staff attention than other tenants, at least during an initial adjustment period. According to the *Property Manager*, formerly homeless tenants' main problems, in order of priority, are:

1. Disturbing other tenants,
2. Drug/alcohol influenced behavior, and
3. Unable to live independently.

The *Property Manager* reports interesting differences in the frequency of management challenges between the formerly homeless and other tenants. While the main issue for all residents is disturbing other tenants, the rent paying habits of the two groups are markedly different. The *Manager* ranked non-payment of rent as the second most frequent management challenge for other tenants and the least occurring issue for formerly homeless Amistad residents. She believes that this group is so conscientious about paying their rent in a timely manner because "they don't want to lose their housing." The *Property Manager* did state that drug or alcohol-influenced behavior and the inability to live independently is considerably more common among the formerly homeless tenants.

The *Property Manager* has found that the formerly homeless tenants often need assistance with particular issues that other tenants are better able to handle on their own, such as maintaining appropriate sound levels in their units and proper housekeeping. Once these tenants grow more accustomed to living in a permanent housing situation, however, there is no difference in how property management works with the tenant populations.

Given that non-payment of rent is not a concern among the formerly homeless tenants, they are not required nor specifically encouraged to use representative payee services. Currently only one Amistad resident employs such a service.

The John Stewart Company, the *Property Manager*, feels that the property management approach combined with the presence of effective case management services have resulted in a successful housing development. Property management and the lead service provider clearly work together. In the past, when property management issued notices regarding lease violations, tenants often misinterpreted the document as an eviction notice. Now the *Case Manager* is utilized to assist the tenants in understanding the process and what needs to be accomplished to comply with the terms of the lease and retain their housing.

Supportive Services Staffing

ACOF employs one full-time *Resident Service Coordinator* (RSC) and one part-time Supervisor to provide on-site services to Amistad's families. The current RSC only recently began working at the property. Prior to her employment, the ACOF *Outreach Coordinator* was temporarily filling the role of the RSC.

Case management services are designed to primarily benefit the special needs tenants. The other tenants are generally referred to other off-site service providers based on their needs. If the agency's budget allowed, ACOF would ideally like to staff an additional RSC at Amistad.

Supportive Services

Supportive services were originally provided to Amistad tenants by Enki, an outside provider. Once the agency was no longer funded to provide services, ACOF took on the responsibility of lead service provider. On-site voluntary services include case management, benefits advocacy, money management, and living skills. Childcare is provided on-site at the independently-run childcare center. Social activities at Amistad include monthly community meetings, occasional holiday dinners, and camping trips for the children.

Tenants are referred off-site to such services as mental health treatment, substance abuse treatment, and education. Roughly 70% of Amistad households have their own vehicles, thus transportation is not a frequently requested service.

When Amistad initially opened, an employment specialist worked with the tenants. As this position is no longer funded, residents must be referred to an outside provider for such services. Similarly, the popular on-site after-school program was terminated due to the lack of ongoing funding.

The 21 special needs tenants receive more intensive case management services than the other households. According to ACOF, this system works well. Providing limited case management, primarily in the form of referrals, to the non-homeless tenants is sufficient in meeting their needs.

Of the services provided, the *Case Manager* believes the most important in supporting long-term successful tenancies, in order of importance, are:

1. Case Management
2. Money Management Medical/Health Services
3. Independent Living Skills Substance Abuse Services
4. Referrals to Mental Health Treatment
5. Referrals to Medication Management

Service Efficacy

Both the service and property management staff report that the services are critical to the functioning of the building and the well being of the tenants. By acting as a liaison between property management and the families, the *RSC* is able to help control physical damage to the property. As staff stated, “kids are hard on a property.” The *RSC*’s efforts also help tenants remain housed by intervening and providing support when issues arise.

The service staff did express a desire to reinstitute the services that were originally offered at Amistad, including the after-school program. They also would like to hire a second *RSC*.

The tenants thought highly of ACOF’s service provision as a whole. They felt that having activities and services on-site “keeps things orderly.” One person commented that services prevent Amistad from “turning into the projects,” describing the property as “an apartment, not the projects.” Services were cited as critical for the children specifically, and the loss of the after-school program appears to have been particularly disappointing to the tenants.

Tenant Satisfaction

All tenants interviewed in the focus groups appeared quite pleased with their housing situations. Participants of both groups commented on feeling “secure” and “stable” at Amistad. Formerly homeless tenants also reported feeling “grateful” and “much more comfortable here” as opposed to the stress of constantly moving while living without permanent housing. One tenant summed up her sentiment with, “It feels good to be home.”

Security was a concern for members of both groups. Cars have been stolen and a mugging occurred in the parking lot. Tenants criticized the gates for being too low, allowing people to easily climb into the property.

Tenants from both groups lamented the loss of the after-school program and expressed a desire for more community gatherings.

Mixed-Population Issues

Tenants were largely complimentary of their fellow Amistad residents, describing them as “friendly” and “willing to talk about their problems.” While the families come from differing backgrounds people generally seem to get along. Although noise and children performing petty

acts of vandalism to the property appear to be issues, the tenants did not cite any conflicts arising from varying prior living situations specifically. One tenant opined that having families with different housing backgrounds in the same building is preferable to a project with all formerly homeless tenants because the children in such developments may get stigmatized.

The service staff did cite some conflicts between the special needs and other tenants. At one point the original service provider hosted a celebration only for special needs tenants, which angered the other tenants. Since then the policy has changed so that events involve all Amistad families. Some low-income tenants have also complained that the special needs tenants receive special treatment in terms of management's tolerance of lease violations. Service staff, however, maintain that it takes time for the *RSC* to be effective in working with the special needs tenants on such issues.

Recommendations from Tenants and Staff

All staff members cited the importance of having a close working relationship between property management and the service provider. Employing a *Property Manager* who has been trained in working with special needs populations, specifically in terms of mental illness, was also noted as a critical reason for success. The tenants appreciate how the current *Property Manager* is approachable and responsive to their needs.

Tenants felt strongly about the need to foster a sense of community within the development, and wanted more community-wide activities to be offered at Amistad. Parents also wanted additional activities to be offered to benefit the children, such as on-site parenting classes and the return of the after-school program, a sentiment shared by services staff. They praised the building's amenities, such as the childcare center, community room, and computer room.

All tenants also remarked that the location of the property itself was an important consideration. They appreciated Amistad's proximity to amenities such as supermarkets, and access to good schools. The importance of providing ample outdoor space for children was highlighted, and adequate security remains an ongoing concern for residents.

The *Developer* emphasized the importance of offering services to non-special needs tenants, for they have needs as well.

Funding

Amistad was developed at a total cost of \$9,096,998. The permanent funding and operating subsidy sources are:

	SOURCES	AMOUNTS
9% LIHTC Equity	State of California Tax Credit Allocation Committee (TCAC) - Tax Credit equity	\$6,221,998
Loan - City of Industry Special Needs Program	Housing Authority of the County of Los Angeles	\$2,170,000
Grant for New Construction	HUD Supportive Housing Program (SHP)	\$400,000
Grant	Federal Home Loan Bank of San Francisco Affordable Housing Program (AHP)	\$300,000
General Partner Equity	General Partner	\$5,000
Operating Subsidy	State of California Supportive Housing Initiative Act (SHIA)	Approximately \$77,000 per year

Amistad received significant funding from the State of California in the form of Federal Low Income Housing Tax Credits – a total of \$6,221,998. The developer additionally secured a \$2,170,000 loan from the Housing Authority of the County of Los Angeles' City of Industry Special Needs program. Smaller, yet critical, grants were secured through the HUD Supportive Housing Program and the Federal Home Loan Bank of San Francisco's Affordable Housing Program. Finally, \$5,000 in General Partner Equity completed the permanent funding required to develop the project.

The project receives approximately \$77,000 annually in operating subsidies for 21 units from the State of California Supportive Housing Initiative Act (SHIA).

1363 FRANKLIN AVENUE

Bronx, New York

Community Access, Inc. and Dunn Development Corp.

The Organizations

Community Access, Inc. is a not-for-profit organization that was founded in 1974 by family members and friends of patients who were suddenly discharged en masse from state-run psychiatric hospitals. At the time, those without assistance had two housing options: flophouses or municipal shelters.

Community Access describes itself as “helping people with psychiatric disabilities make the transition from shelters and hospitals to independent living. We provide safe, affordable housing and support services, and we advocate for the rights of people to live without fear or stigma.” The agency practices a Housing First approach to housing and a harm-reduction philosophy. It was one of the national leaders in developing the supportive housing model.

Community Access now provides over 850 affordable housing units for people with psychiatric disabilities, people living with HIV/AIDS, families with disabilities and low-income people from local neighborhoods. Sites and programs are located in the Lower East Side, East Village, and Washington Heights in Manhattan, as well as in the Bronx and Brooklyn. In fact, the Franklin Avenue development is one of three projects developed by Community Access in this area of the Bronx that are in fairly close proximity to each other.

The agency now has more than 100 additional units in the development pipeline. Community Access has organized its programs around an important concept: that is, people who have received services (“former patients”) possess special insights into how best to design and deliver services. Toward that end, currently one-third of its staff are current or former users of mental health services.

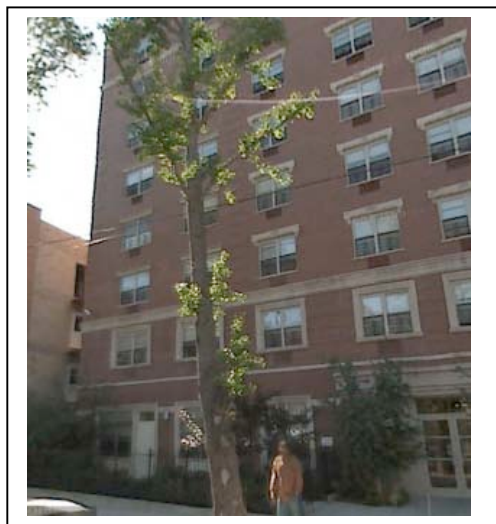
Additionally, among its other programs, Community Access operates the Harp Peer Advocacy Center, which has helped hundreds of mental health consumers find meaningful, permanent employment in the New York area. Founded in 1995, the Center is operated exclusively by professionals who have personal experience as consumers of the mental health system.

Dunn Development Corp. brought critical resources to the development partnership with Community Access. Dunn Development Corp. is a for-profit real estate consulting and development firm founded in 1998 to develop new affordable and supportive housing projects. Dunn Development often collaborates with nonprofit organizations, as they did with Community Access, to jointly develop housing. In this case, Dunn already had possession of the site and Community Access valued Dunn’s experience at assembling complex financing packages, including securing 9% Federal Low Income Housing Tax Credits to fund projects.

The Project

Occupied since 2005, the Franklin Ave. development is in the Morrisana neighborhood of the Bronx, mid-block on a largely residential street with apartments (some new), single-family homes, and some institutional uses. It is less than one block from a commercial strip where there is a major bus-line. The neighborhood is largely low and moderate-income residential. There are some signs of burned out buildings within sight of the development, as well as abandoned large single-family homes on the block.

The development consists of 66 units. There are 44 studio units for previously homeless individuals. These units are fairly large, 450 square feet in size. There are 21 two-bedroom units for the non-homeless families that are 800 square feet in size. These units are reserved for families with children with incomes below 60% of Area Median Income (AMI), which means a family of four must have an annual income of less than \$46,080. And, finally, there is one two-bedroom unit for the on-site Building Superintendent.



Physical Features

The building is a new construction brick eight-story 52,000 square foot development and has two elevators. It is in scale with and complements the neighborhood. As is typical for the neighborhood, there is no on-site parking.

Of the development's 66 units, the 44 studios for previously homeless individuals are 450 square feet while the 21 two-bedroom units for the non-homeless families are 800 square feet in size. All of the units are rented furnished with a stove and refrigerator also included. The previously homeless tenants "own" many of the furnishings after residing in the building for three years.

There is considerable community space, 13,000 square feet in all, including a lovely large outside garden and seating area, which the tenants attend to especially during the warm months

when flowers and plants are cultivated and where there are several substantial-sized outdoor benches. In the warm months, children can play and many of the residents participate in community potluck barbeques in the garden.

There is also a 1,400 square foot interior space that includes a large community room and community kitchen, as well as a library/computer room and a laundry room, all on the first floor of the building. The community room opens to the outdoor area and is adjacent to the library/computer room. It is furnished with very comfortable couches, chairs, and tables and has a wide-screen television that tenants frequently gather around. Many activities take place in the community room, including movie nights and community holiday parties, and it appears to be a nexus of community activity.



The library/computer room has several computers and a glass plate so that you can see into it. It was noted that both the adults and children use the computer room—the adults for accessing resources and resume preparation and the children for their assigned school homework. The community room as well as the entire building have free Internet access.

The laundry room has several coin-operated washers and dryers and is adjacent to the community room. Other community amenities include a 24-hour front desk with a large lobby and seating area, again in a comfortable, welcoming environment.

Lastly, there is 750 square feet of social service offices on the first floor that is comprised of several individual offices and a workroom. There are arranged flowers in the various community rooms adding to a sense of home, which the tenants have responsibility for arranging.

Tenant Characteristics

Franklin includes 44 studio units specifically targeted for previously homeless tenants – two-thirds of whom were chronically homeless. Of these 44 tenants, all have some form of mental illness, 80% have had a history of substance abuse, 21% have a co-occurring disorder of substance abuse and mental illness, and 23% have more than one mental health diagnosis.

Almost all of the previously homeless tenants, 87%, came from an emergency shelter, 10% previously lived in a transitional housing program, and 3% were incarcerated in jail or prison.

One recently enacted program for formerly homeless tenants is the Frequent Users Service Enhancement Project (FUSE) that provides housing to a subset of the homeless population that has experienced, over the last four years, considerable recidivism in shelters and jails. Of the 100 participants in the New York City program, which was initiated by the Corporation for Supportive Housing, five tenants reside at Franklin. These tenants receive an extra layer of support in the form of service coordination and crisis intervention on residual issues related to their incarceration and probation/parole status.

Property Management

Community Access operates its own property management, Places Plus Inc., which now provides property management to this and all other properties that Community Access owns in the Bronx, Brooklyn and Manhattan.



Property Management Staffing

The only full-time staff person is the *Building Superintendent* who also has a two-bedroom apartment in the building. Most of the staff of Places Plus Inc. are ten percent staff equivalencies or less and include the Accountant, the Coordinator, the Director of Operations, the Director of Property Management, the Field Supervisor, the Receptionist (their portion of the cost), and the Senior Accountant. The *Senior Site Coordinator* is the only exception, working 30% of their time for the building.

Property Management and Leasing

In New York City, there is a single point of access for referrals to permanent supportive housing for the homeless, the New York City's Department of Health Services (DHS). DHS encourages Community Access, as well as other developers of such housing, to accept all of the tenants that they refer, a departure from earlier policy that permitted the developers to screen applicants.

According to the *Director of Property Management* the referred individuals are members of a backlog of hard-to-house people, all of whom have been in shelters for long periods. She opined that Community Access was accepting of the policy change because it is not really possible to determine up-front who will be successful staying housed. However, she did make clear that they do not rent to anyone who they know to be dangerous, is a sexual predator, or has a history of fraud.

An impressive 85% of the referred homeless applicants successfully lease an apartment and only 15% drop out of the process. The affordable family units have a lower success rate with 50% of the applicants successfully leasing, 15% dropping out (because of so few vacancies) and 35% being screened out (generally because of income qualifications). Families cannot earn more than 60% of AMI.

Whenever a vacancy occurs, Places Plus Inc. advises DHS which then makes the referral. DHS performs a valuable service by helping complete all of the application materials, including identification and income verification, which for people who are homeless can often be a challenge. The agreement between the two agencies requires that all paperwork be completed within 30 days.

As far as families, Places Plus Inc. keeps an open waiting list and contacts families next on the list when a vacancy occurs.

The Property Management staff and the social services staff meet with all potential applicants three times before signing the lease, which helps ensure that all parties have the same expectations and know what they are getting into.

All of the tenants who were previously homeless receive a rental subsidy from the State that operates like a Section 8 voucher in which the tenant pays 30% of their income for rent.

Community Access has instituted a “wall” between social service and property management in order to protect the privacy of its tenants and encourage them to make their own choices about whether they want property management issues to be discussed directly between the two departments. After they have signed leases and moved into their units, tenants may sign agreements to allow the two staffs to share information. In this way, the tenants do not feel pressure to sign the agreement when moving into the building. It was reported that virtually all of the previously homeless clients have signed the agreement.

Property Management Challenges

According to the *Property Management Director*, formerly homeless tenants’ main problems, in order of priority, are:

1. Disturbing other tenants,
2. Unauthorized guests, and
3. Non-payment of rent.

While the *Associate Director of Supportive Services* largely agreed, there were some differences in order and inclusion as she identified the main three problems as:

1. Non-payment of rent,
2. Unauthorized guests, and
3. Drug/alcohol-influenced behavior.

For families, the *Property Management Director* indicated that the top three problems are:

1. Non-payment of rent,
2. Unauthorized guests, and
3. Disturbing other tenants.

While property management works with the families, there have been families evicted, including for non-payment of rent.

The Property Management staff reported that since the building opened there has been a change in the tenant population due to DHS referrals of a more unstable homeless population, resulting in more turnover. This is the result of the City's initiative to move more long-term shelter users out of the shelters and into permanent, supportive housing.

The *Director of Property Management* expressed that the previously homeless clients require more staff attention than the families. The reasons are multifaceted and include the difficulty in developing good rent payer habits because they often have never had their own apartment; some do not know how to maintain their apartment in a sanitary manner; and others engage in conduct that disturbs their neighbors. Additionally, hoarding occasionally occurs and, not uncommon to persons with a mental illness, some people have trouble maintaining their personal hygiene.

All of the apartments are inspected bi-annually. If property management staff observes a problem they will spend additional time with the tenant and offer to accompany the tenant to meet with the service program staff. If this approach does not work, they will advise the tenant that they will "make a note of the things we discussed" so the tenant will know ahead of time that they are referring a problem to the social services staff. Staff believes that honesty and transparency are critical to their relationships with all of the tenants.

The *Director of Property Management* stated that they have had a more difficult time in securing the tenant's portion of the rent in recent years and expressed that it is difficult for tenants to pay their rent if they are on SSI Disability or some form of public assistance. She said that it is difficult to pay for food when your income is only \$724 a month or less and you are paying \$207 in rent. Even more affected are tenants on Public Assistance who receive only \$68.50 every two weeks plus food stamps. Furthermore, individuals often lose their benefits as they must be recertified in-person every six months for public assistance and annually for Food Stamps, as well as report if there is any change in their status.

According to the *Director of Property Management*, there has not been a case of a formerly homeless tenant being evicted for non-payment of rent as the team works with them to secure the rent through help in budgeting and securing in-kind goods (such as food), as well as helping them secure rent arrears grants. Even though it was acknowledged that non-payment of rent is a fairly significant problem, the Community Access corporate culture of encouraging self-determination is such that they do not require nor encourage that tenants engage representative payees to assist them in paying their bills. They do report that two tenants do have such an arrangement but they had it before they moved into the building.

Some previously homeless tenants have been evicted because of behaviors other than non-payment of rent. The *Property Management Director* reported that none of the families had expressly moved because of the behavior of the formerly homeless tenants.

Supportive Services Staffing

Community Access' Franklin Avenue development is well endowed with social services staffed by the agency, including a full-time *Program Director*, two *Service Coordinators*, one half-time *Nurse Practitioner*, a one-fifth time *Psychiatrist*, and 5.2 Full Time Equivalent *Receptionists* ensuring 24/7 front door coverage. This equates to one Case Manager to 14 formerly homeless clients. According to the agency *Executive Director*, services funding for the housing is not part of the "above-the-line" underwriting of the property development, but rather from the State budget administered by the City of New York.

Community Access also partners with several hospitals in the community as well as the Intensive Case Management (ICM) and Assertive Case Treatment (ACT) teams that can be dispatched throughout the City, especially after someone has been hospitalized.

Supportive Services

The families living in affordable housing units can also use the social services staff, however, it was noted that for the most part, the families are quite stable. Families come to them for benefit entitlement issues, conflict resolution, and socialization.

All services in the building are voluntary, however the vast majority of previously homeless people utilize these services, with more using them every day.

The most important on-site social services, in order of priority, expressed by the *Property Manager* are:

1. Service planning
2. Benefits Advocacy
3. Assistance in apartment cleaning
4. Promoting Community Spirit
5. Crisis Intervention

The *Deputy Director of Social Services*' identification of top service needs are:

1. Money Management
2. Benefits Advocacy
3. Living Skills
4. Mental Health Counseling
5. Social and Recreational

The *Deputy Director of Social Services* also expressed the fact that there is a real sense of community in the building—a theme we heard repeated over and over again in our tenant focus groups. There are many activities that the previously homeless and the families participate in together, which include: a continental breakfast each morning, barbeques during the summer, community night on Friday, and movie day on Saturday. Other activities include neighborhood block parties, carnivals and street fairs; work in the garden, and such health activities as learning about smoking cessation. The family focus group was particularly excited about tickets to sporting events and Broadway plays. Moreover, Franklin is one of three apartments owned by Community Access that are fairly close together, and tenants enjoy activities at the other two properties.

All tenants can secure assistance from the social services staff both on-site and off-site. The services offered include benefits advocacy, case management, education/training, employment/vocational services, meals and nutritional counseling, housing information/housing placement, living skills, medication supportive service, mental health counseling/treatment, money management, representative payee, social and recreational activities, support groups, and transportation.

Service Efficacy

The *Deputy Director of Supportive Services* reported that it is vitally important to have on-site services to ensure long-term successful tenancies. She noted that people need considerable assistance in maintaining their public benefits, including their rental subsidy, and help in budgeting because of their extremely low-incomes. She also noted how important the front desk receptionist staff is in both making the tenants feel secure and providing someone to talk with and welcome them with a smile when they enter the building. Furthermore, on-site services are extremely important for people who have been homeless—and who have failed before—because many behavior and habit changes are needed for them to succeed as permanent tenants.

Tenant Satisfaction

The previously homeless tenants were thrilled with the opportunity to live at Franklin. When asked how their life had changed, we received responses such as “dramatically,” and “a lot of mental tension was released.” A man told us that he “has stability now. I used to think I would never have my own apartment and started to doubt it would ever happen.” Two of the previously homeless tenants advised us that the City had previously issued them a Section 8 tenant-based voucher but they couldn’t find a landlord who would rent to them.



Franklin focus group participants pose with Shelter Partnership interviewers on the building's rear patio.

The family focus group was as effusive. One woman told us that she is happy to get to decorate and that she loves the 24-hour security and the computer room. She further explained that there are no “unwanted pets”—a reference to rodents. She explained that the unit is both affordable and she gets a doorman, too! Another woman told us how happy she is not to have to leave the building to do laundry. And another expressed how there are no broken bottles in the backyard, unlike public parks. They also remarked on the great sense of community that they have living at Franklin.

Mixed Population Issues

We were advised by all of the people that we interviewed, the *Executive Director*, the *Deputy Director of Supportive Housing*, the *Property Manager Director*, and the tenants, that mixed population works in this development. We were not informed of any problems between the two groups of tenants per se. In fact, the *Executive Director* advised us that if he has his choice in the future he “would only do this type of development.”

The *Deputy Director of Social Services* volunteered that she had worked in both all-formerly homeless and integrated buildings and that integrated buildings were the “way to go”. Specifically, there is unintentional stigma associated with buildings comprised of all formerly homeless tenants, but in integrated housing the “community can’t put their thumb on what it is.” Furthermore, it gives people more confidence and normalizes and reinforces their existence.

The *Director of Property Management* shared that the “all homeless” model brings stresses because there are not enough role models, and it seems more institutional. She further shared with us, however, that it might be more financially secure if the government funded more of the rents, as renting to working people with relatively low incomes is always fraught with difficulties.

Finally, and perhaps most illuminating, were the responses of the tenants—both the previously homeless and the low-income families. The formerly homeless focus group said that they had not experienced any discrimination from the families, but had from other previously homeless individuals in the building. Furthermore, several of the individuals expressed how much they appreciated and enjoyed the children. One woman shared with us that “they are all my children” and another woman commented “if you spend time with them, they will make me laugh and make me happy.”

The families expressed positive feelings as well. Two families expressed the view that they wanted their children to be exposed to people with different backgrounds, including different ethnicities. One woman did acknowledge that she had some apprehension when she first was considering moving into the building, but she is now very comfortable and knows that if an issue comes up she can talk with staff to get it resolved. The same woman expressed faith in property management that they would not rent to people who would be dangerous.

Recommendations from Tenants and Staff

When asked if funding were not an issue, what would be their priorities for additional staff, both the *Director of Property Manager* and the *Deputy Director of Supportive Services* expressed that they could use more time for both the *Nurse Practitioner* and the *Psychiatrist*. The *Deputy Director of Supportive Services* added it would be helpful to have a person who is dedicated to developing socialization activities and vocational services.

The staff felt that it is very important that all staff “buy into” the integrated model for it to work. They maintained that for the best results and to minimize conflicts staff should treat all tenants equally, regardless of their background. Furthermore, they expressed the opinion that “community” is sometimes uncomfortable and that you must continually provide education, information and conflict mediation.

Other recommendations included letting everyone in the building be part of the community—specifically to not restrict services to only the previously homeless.

It was also noted that staff needs to be very cautious with issues of confidentiality, for when it is breached, trust is lost. Along this same line, because staff are working where people live it is important to be very careful in your conversations with others as people can overhear what is being said.

Both training and reinforcement are critical when on-site services are provided where someone lives. Staffing should be person-centered. Furthermore, there needs to be integrated staff between the property management function and the social services support.

Rules are important and make people feel safer. Boundaries are also very important. We were reminded that language is a major issue. For instance, stay away from the word “program” as this is “housing.” Furthermore, do not call people “clients” as they are “tenants.”

The tenants expressed their great satisfaction with security, especially the cameras and the 24/7 receptionists. One man who has a family and works in the construction industry expressed that he's been in Park Avenue buildings that don't look as nice as their building. The tenants also agreed that they have a great *Building Superintendent*, "the best in the City" and that they've never seen such a clean basement!

Both groups took pride in the building with the formerly homeless focus group saying that the building is homey, not like a hospital or a shelter. One of the family participants commented on the fresh flowers and how much she enjoyed this special touch. People from both groups agreed that the backyard was a great amenity as was the community room, laundry room, and computer room.

Both focus groups said it was important to have on-site activities as well as planned events. The formerly homeless focus group especially appreciated the activities with tenants explaining that the studios are small and you need a place to go for camaraderie.

The family focus group's two recommendations were to provide parking (there is no on-site parking at Franklin) and to "go green." One of the formerly homeless tenants thought the building needed better lighting in the backyard.

Funding

Franklin was developed at a total cost of \$12,233,000. The permanent funding and operating subsidy sources are:

	SOURCES	AMOUNTS
9% LIHTC Equity	Syndicator: The Richman Group)	\$10,233,000
Loan	New York State Division of Housing and Community Renewal (DHCR) Housing Trust Fund	\$2,000,000
Operating Subsidy for Formerly Homeless	New York City Department of Homeless Services	\$102,000/yr.
Operating Subsidy for Formerly Homeless	New York City Department of Health & Mental Hygiene	\$589,000/yr.

The Community Access *Executive Director* explained that Franklin Avenue is a hybrid version of a typical project. A typical project would include capital funding from both the State and City under the NY/NY program involving two agencies, the City Housing Development and Preservation (HPD) and the State Department of Mental Hygiene (DMH).

In contrast, Franklin does not include City capital money. Because of the decision to include family units at Franklin, the project's capital funding all came from the State, in the form of a grant and 9% Federal Low Income Housing Tax Credits.

Rent subsidy and service funding are provided by the State through the New York City Department of Health and Mental Hygiene. This funding is supplemented by the New York City Department of Homeless Services' SRO Support Subsidy, which funds most of the 24/7 front desk position, with additional funding for the front desk position made up from the building's operating budget.

Potiker Family Senior Residence

San Diego, California

Senior Community Centers of San Diego

The Organization

Senior Community Centers (SCC) provides services for low-income, at-risk seniors in downtown San Diego at SCC's Broadway Day Center and at two permanent housing projects developed and managed by SCC, one of which is the 200-unit Potiker Family Senior Residence (Potiker).

SCC, a non-profit organization, started as a senior day center in 1970 with funding from Catholic Charities. Senior Community Centers' programs for high-risk seniors currently include meals, affordable housing, treatment for existing mental and physical health problems, preventative care and health education, and social services including assistance in securing entitlements and referrals to community partners.

Many of these services are provided at SCC's Broadway Day Center, which serves adults 60 years of age and older who are on fixed incomes, mostly below the poverty level. The Broadway Day Center attracts homeless clients with its breakfasts and lunches served by local volunteers from companies in downtown San Diego. The Center also offers the services of *Social Workers*, a *Registered Nurse*, and a *Psychiatric Nurse*.

SCC's housing efforts started with placing homeless older adults from a cold/wet shelter in nearby SRO units using short-term vouchers. The San Diego Redevelopment Agency then leased 20 units for a SCC transitional program in a 200-unit SRO building one-half block away from the Broadway Day Center.



SCC offers money management and representative payee options to all its clients. It encourages clients to put \$400 per month in a bank account in order to accumulate \$1500 - \$1800 to move

into permanent housing. Some clients move to market housing, some to board and care, some back with family, and many move to Potiker.

Because of the success of Potiker, in August 2007 SCC opened a second permanent housing project, the 150-unit City Heights project, eight miles from downtown San Diego.

The Project

SCC set out to develop permanent housing for their Broadway Day Center clients who were homeless or at-risk of homelessness. They did not think in terms of “mixed-population housing,” rather they wanted to provide affordable housing for their older adults clients who were physically and mentally fragile.

Guided by the Corporation for Supportive Housing and in partnership with Chelsea Investment Company, SCC opened its first permanent housing project for older adults under the name Market Square Manor in August 2003, later changing the name to Potiker Family Senior Residence. Located at 525 East 14th Street between Market Street and Island Avenue, the building is conveniently placed with proximity to public transportation and retail establishments. Both the downtown trolley and the bus have stops nearby and there is an Albertson’s grocery store in the mixed-use development next door. A strong neighborly relationship has also developed between residents at Potiker and residents at the halfway house located across the street, with halfway house residents taking a protective stance towards the seniors.



Potiker contains 198 studio units of affordable housing for very-low income seniors and two units (1-bedroom and 2-bedroom) for the managers. All of the units except the managers' units are restricted to incomes below specified percentages of Area Median Income (AMI): 100 units at 60% of AMI, 81 units at 40% of AMI, and 17 units at 35%. In 2008, 60% of AMI income limit for a single person in San Diego County, California, was \$33,180. About one-half of the current tenants were formerly homeless.

There is a large community space in the lobby as well as community spaces on each floor. There is an exercise room and several balconies. The on-site kitchen serves two meals daily although the tenants can avail themselves of the common-area kitchens. The coin-operated laundry operates at cost. The project also provides executive and administrative offices for SCC.

Most services are offered on-site and are provided in a non-clinical, "clubhouse" model by focusing on tenants' interests in jobs, relationships with each other, and personal responsibility.

Paul Downey, president and CEO for SCC noted that Potiker has been recognized nationally and "is almost the gold standard for what affordable housing should be. We have affordable rents, plus, we have supportive services which are critical to seniors being able to function and to survive and to flourish."

Downey also notes that there was no community opposition to the project because, he believes, it is a senior building. He added that there would have been no opposition even if it had been proposed as 100% homeless.

Physical Features

Potiker is a five-story mid-rise project in the East Village of San Diego. The majority of units are 350 square feet, except for sixteen corner units that are 450 square feet. The rooms are rented furnished.

The property includes a commercial quality kitchen for dining room meal service for residents and other clients of SCC, a library, recreation rooms, a TV room, outdoor courtyards, a garden area with a fountain (made possible through the City of San Diego's donation of the land after the discovery of an earthquake fault that rendered the plot unbuildable).

The building has a rooftop patio with a great city view. Both private units and community rooms offer views of the street, creating at once a feeling of security and a connection with the city. Outside, the building occupies a city block and fits in with the community because Potiker is built on the same scale and with many similar features as the surrounding buildings.

The design allows for good tenant interaction and for space for diverse service programs. The first floor is wheelchair-accessible from the sidewalk and includes a comfortable reception area. SCC executive offices are also located on the first floor. Despite the efficiency inherent in on-site administration, SCC staff caution that having offices on-site creates an institutional feel that should be avoided.

Tenant Characteristics

SCC received a grant from The California Endowment that allowed SCC to survey Potiker tenants in depth. The assessment, based on 2003 data and released in 2006, revealed diverse physical, emotional, intellectual and social backgrounds:

Demographics

- The minimum tenant age was 62.
- Seventy-seven percent of the tenants were over age 65.
- Seventy-six percent were male.
- Sixty-three percent were white, 14% Hispanic, 9% African-American, 6% Filipino, and 4% other.
- The primary language of 84% of the tenants was English, 6% was Spanish, and 6% was Tagalog.
- Five percent said that they needed an interpreter.
- One-quarter of the tenants never married, and only 9% are currently married.

Income

- The mean monthly income was \$947.36.
- The most typical income sources were Social Security retirement and SSI.
- Fewer than 10% reported incomes from Social Security Disability or VA pensions, although 38% reported being veterans.

Education

- While 18% reported eight years or less of formal education, 21% said they had some college or post-high school training and 26% reported having a college degree and/or post graduate education.

Prior Living Situation

- In the year prior to leasing at Potiker, 28% had been homeless at least once (33% of the men and 14% of the women).
- Many tenants suffered an injury or illness years ago that the SCC staff believe contributed to their homeless status. The seniors, however, discount such a connection.
- Twenty-five percent reported they had fallen at least once in the prior six months.
- Thirty-five percent of the tenants report having been institutionalized.
- When asked where they lived immediately prior to moving to Potiker, 41% said an apartment or house, 33% an SRO hotel, 15% shelter or streets, 4% nursing/board and care, and 7% other arrangements.

Property Management

When the project opened in 2003, SCC contracted with Current Change Consulting Analysis and Evaluation Network for a three-phase comprehensive service planning assessment that was conducted over several years and during the tenures of two different management companies. While the assessment was primarily geared to identifying residents' service needs, it also

provided SCC with the tenants' candid opinions of the approaches of the two property management companies, including the current firm that has a history of working with special needs buildings.

For instance, as a result of the latest set of tenant assessments, SCC reinforced its strong asset management beliefs for affordable housing for older adults with special needs: (1) train property management staff so they understand the population and community from the perspective of SCC and from the perspectives of the residents themselves; (2) nurture a culture of seamless accountability to the residents in which property management and SCC staff each have their own roles, but residents never feel shuffled from one to another when they have concerns; (3) provide clear written and oral explanations regarding rent and building procedures when residents move in and at periodic intervals after move in, as moving can be a difficult time to try to understand emotionally charged issues such as rent and rules; and (4) ensure that every staff person understands the need to treat residents with respect and as autonomous decision-makers in their own lives, even though they require some assistance to live independently.

SCC also recommends clearly articulating the needs of the population and the agency's mission when hiring a property management company. While the *Property Manager* needs to receive timely rents and keep resident interaction at a minimum, this need not happen to the exclusion of good human service delivery methods.

Property Management Staffing

A resident manager and an assistant resident manager oversee day-to-day operations at Potiker. In addition, there are two maintenance workers and a housekeeper who also does light office work one hour a day.

While the *Resident Manager* and the *Assistant Manager* know which residents were formerly homeless, none of the other property management staff are privy to this information. The same procedures or policies apply to all tenants irrespective of their previous housing situation.

Property Management and Leasing

In addition to applicants from SCC's transitional housing program, Property Management solicits referrals by sending applications to San Diego non-profit organizations that work with seniors, such as Heritage Clinic and St. Paul's PACE program. They also send applications to other communities with senior buildings. Periodically, advertisements are also placed on the Craigslist website.

Potiker does not reserve a particular number of units for homeless applicants. As noted above, formerly homeless and other applicants apply through the same application process, which is administered on a first come, first serve basis.

The application process is continuously open and seven to eight applications are received every week. Once applications are received, the compliance department follows up with credit checks. As of November 2008, there were approximately 17 people on the waiting list. Potiker is a

desirable residence; while other residences may offer lower subsidized rent, they do not offer two meals daily for free. Some applicants are referred to other affordable housing projects such as the SCC City Heights building.

In addition to their other duties, two SCC *Social Workers* provide on-site assistance with the application process to all applicants. The *Social Workers* lead tours of the building, complete applications and, in general, operate as liaisons between property management and potential residents. Property management did not find the lease-up to homeless applicants to be any more time-consuming or challenging. This is in spite of, or perhaps because of, homeless applicants being subject to the same lease-up process as all other applicants. On the other hand, the *Property Manager* conjectured that perhaps there was more urgency on the part of the homeless applicant with regard to the application process.

Property Management Challenges

Potiker's property management regards the formerly homeless residents as part and parcel of the general pool of tenants. The *Property Manager* said that she thought of all of them as "tenants." Indeed, property management services are delivered in identical fashion to all residents. Thus, the *Property Manager* was unable to list property management issues that were unique to formerly homeless tenants.

For all tenants, the *Property Manager* indicated that the top four problems are:

1. Clutter,
2. Non-payment of rent,
3. Unable to live independently, and
4. Unauthorized guests.

Clutter was the most often recurring challenge. To address clutter, property management conducts room inspections twice a year and clutter is not allowed to accumulate to the extent that it becomes a fire hazard.

The next most common issue was non-payment of rent. Rent payment is difficult for all tenants who are on fixed incomes. While it is not a condition of leasing to use representative payees, some tenants do use the service, however, most of those are the non-homeless tenants. To prevent such issues, tenants may enter into a payment pledge with property management and pay the rent in installments.

When the current *Property Manager* first joined the building two years ago, there was \$20,000 in rent arrears, but she resolved the situation. This was accomplished by:

1. Negotiating repayment agreements,
2. Holding a monthly raffle, and
3. Working closely with the on-site *Social Workers*
4. Reducing individual rents where possible.

Repayment agreements allowed tenants whose rents were delinquent to gradually catch up. The *Property Manager* is always willing to negotiate repayment agreements.

The *Property Manager* initiated a monthly raffle for tenants who paid their rent on the 1st of the month or earlier, with two \$50 Albertson's supermarket gift cards as prizes.

The *Property Manager* reported good results from working closely with the on-site *Social Workers* when tenants did not pay rent or otherwise act out.

Additionally, the *Property Manager* has been able to reduce some tenants' rents to more affordable levels. The project's Federal Low Income Housing Tax Credits Program funding established various affordability levels expressed as percentages of Area Median Income (AMI). The *Property Manager* initiated a practice of allowing tenants who originally qualified for a 35% AMI unit, but took a 45% AMI unit due to availability, to be switched to the lower rent when a 35% AMI unit became available, provided they had six months of good rent-paying history. This last measure has created an incentive for the most heavily rent burdened to pay the rent first and has proven popular; a wait list is now maintained. The amount of rent in arrears has decreased dramatically to \$2,000 and this only because two tenants died and the units have to be held until the death certificates are received.

The *Developer* hopes to further address rent collections by accessing Project-Based Section 8 Vouchers for 30 units in the development, which he will use for his most heavily rent-burdened tenants. The *Developer* is currently working with his local housing authority to secure that commitment.

Other challenges that occur periodically include tenants who are unable to live independently and unwanted guests. The on-site *Social Workers* take action when it comes to those who are unable to live independently and, thus, these cases are not a property management issue, per se. All guests must check in and check out with the security guard who, if notified by tenants, will turn away unwanted guests.

Management meetings are held for all residents to attend, in the dining room, with a sound system. If there were more funds available, the *Property Manager* would like to add more activities and more themed events and parties.

Supportive Services Staffing

SCC secured funding from The California Endowment to implement a geriatric support service model designed to be culturally appropriate in supportive housing. As a result, Potiker offers culturally and socially sensitive supportive services, including physical and mental health education and counseling, health monitoring, and legal counseling in order to address residents' needs before they become barriers to maintaining their housing status. Ongoing funding for the on-site services comes from SCC fundraising. In addition to on-site services, SCC also collaborates with Sharp Downtown Senior Health Clinic (along with Sharp Mesa Vista Psychiatric Health Hospital).

When the building opened, a *Resident Services Coordinator* provided services. In order to engage tenants, address issues of acting out, and constructively address lease violations, rather than through eviction, Potiker added an *Older Adult Rehabilitative Specialist*, who is viewed by the *Developer* and *Property Manager* as a major reason why evictions are few and rent collections are high. These two full-time positions are augmented by a *Registered Nurse* and a *Psychiatric Nurse*, each of whom have office hours on site totaling eight hours per week.

Supportive Services

SCC staff believe that homeless older adults benefit from a transitional program prior to permanent housing. From experience, they know that as few as six months of homelessness make any older adult frail, so that homeless older adults need to be stabilized and have their physical and mental health needs met in transitional housing with no time limit prior to moving to permanent housing.

Prior to leasing at Potiker, a caseworker meets with the potential resident to create a service plan. SCC learned how crucial this step was when they did not include it at initial leasing. Many tenants isolated and resisted subsequent efforts to engage them. Now, new tenants work with and trust Potiker services staff even before moving into the building.

The most important on-site social services, in order of priority as expressed by the services staff are:

1. Food/Meals,
2. Case Management,
3. Living Skills (such as assistance in cleaning),
4. Social Activities to Promote Community Spirit, and
5. Mental Health Counseling.

Many activities at Potiker are offered using a “clubhouse” mental health model that focuses on resident interests (rather than on limitations and disabilities) and helps them come out of isolation. The *Older Adult Rehabilitative Specialist* coordinates the clubhouse programs, including those that are resident-led and allow tenants to offer their skills to others. The clubhouse meets once per week, mostly to announce the schedule of clubhouse programs. In addition to the clubhouse programs, a resident-led group, the Ambassadors, functions as a residents’ committee. Started by a resident to help address safety concerns, these meetings facilitate information sharing. While this is a resident-led group, the *Older Adult Rehabilitative Specialist* attends the meetings to gain and provide information.

In addition, Potiker offers two hot, nutritious meals daily.

The California Endowment grant also allowed SCC to survey tenants regarding services that help them maintain independence, stability and participation in the larger community. Respondents reported participating in AA meetings, Ambassadors group, Bible study group, clubhouse meetings, exercise class, gardening, Hebrew study group, job training program, musical events, potlucks and picnics, singing club, trips, and yoga.

The *Social Workers* encourage continued participation by listing daily activities on a board displayed prominently in the building lobby area. Tenants do not hesitate to go to the *Social Workers* for the slightest problem. If the *Property Manager* notices a change in a tenant, she asks the *Social Workers* to check on them.

Service Efficacy

Tenants who participated in our focus groups were grateful for the *Social Worker's* help resolving problems with Social Security and in getting power wheelchairs. They also appreciated the Monday and Thursday nurse hours to check blood pressure, blood sugar, and make referrals to doctors, and periodic podiatrist visits.

Tenants with Medi-Cal are referred to the San Diego County's In-Home Supportive Services program.² This program combines health-care services with social support services with the goal of keeping older adults as independent as possible. The program gives seniors the option to remain at home with needed care and support rather than going to a hospital or nursing home.

In addition, SCC staff offers individual coaching for tenants who lack housekeeping skills, which they have found more effective than group classes about housekeeping.

Property Management believes that the on-site *Social Workers* are an integral part of the reason that challenges are not restricted to formerly homeless clients. Furthermore, the *Social Workers* help with finding relatives, health insurance, income taxes, and outings.

In addition, because both homeless and non-homeless tenants partake in these services, the benefits accrue to all tenants, not just the formerly homeless. As such, property management endeavors to engage tenants with on-site social services at intake by having the *Social Workers* conduct the tours of the building.

The *Property Manager* believes that the key aspects of the supportive services include being a referral and information source for the tenants, especially about physical health and medical issues, and simply being there for the tenants whenever tenants feel the need to talk.

Tenant Satisfaction

Both the formerly homeless and general population focus groups described Potiker's on-site services as very important to most tenants. The focus groups praised the availability of service staff, the meals program, the coffee club, the computer room, and the clubhouse meetings. One formerly homeless tenant said that group activities are important because a lot of tenants are depressed about life occurrences that caused them to move to Potiker, and because living in a

² The In-Home Supportive Services (IHSS) Program helps pay for services so people who are over 65 years of age, or disabled, or blind can remain safely in their own homes. Disabled children are also eligible for IHSS. IHSS is considered an alternative to out-of-home care, such as nursing homes or board and care facilities. IHSS can authorize housecleaning, meal preparation, laundry, grocery shopping, personal care services (such as bowel and bladder care, bathing, grooming and paramedical services), accompaniment to medical appointments, and protective supervision for the mentally impaired. See <http://www.cdss.ca.gov/agedblinddisabled/PG1296.htm>

200-unit building requires an adjustment for people used to living only with family or living alone. Both focus groups appreciated special activities for holidays, such as musical performances, dinner at Christmas and Thanksgiving, and a Halloween event.

The general population focus group described the outings program glowingly, recalling trips to Old Town, SeaWorld, Oceanside, and Balboa Park, while lamenting that it is difficult for tenants in motorized wheelchairs to participate, because the outings rely on public buses and trolleys with limited capacity for wheelchairs. The homeless focus group reported much less participation in outings.

Mixed-Population Issues

Both focus groups reported that they liked their neighbors in Potiker, offering that they “are all friendly,” “by and large, a pretty good blend,” and “very good people.” “We’re all a family,” one general population focus group participant explained. “We check on each other and take care of another; everyone is friendly to one another.”

Some general focus group members said that they would like to participate in activities and meals on weekends at SCC’s Broadway Day Center nearby, but do not because they believe “dirty and smelly” clients will be there, whom they assume to be homeless. They did not attribute these characteristics to their neighbors in Potiker who were formerly homeless, instead describing all Potiker residents as “clean and courteous.”

Most of the general focus group were not aware when they leased that formerly homeless tenants would be among their neighbors, but learned so after moving in. The general population focus group supported the policy of including formerly homeless tenants at Potiker. One observed, “I give them credit for getting off the street.” However, some members of the general population focus group blamed homeless tenants for a chronic bedbug infestation problem that property management acknowledges has been an ongoing challenge. “They should be cleaned up before they are let in so that they don’t bring in bedbugs,” suggested one participant, who also said that he is in no way apprehensive or concerned about having formerly homeless neighbors.

Many of the formerly homeless tenants knew one another from the transitional housing program SCC uses as a source of applicants. They reported no negative experiences with other tenants relating to their homelessness, explaining that “you can’t tell who’s who,” and “not everybody knows everyone’s story. Tenants here don’t broadcast their stories.”

Recommendations from Tenants and Staff

While tenants appreciate improvements since the building opened, such as the installation of larger refrigerators, the addition of computers to the library, the new equipment in the exercise room, and the bedbug eradication effort (which included spraying and removal of carpet), many were furious over recent rent increases. Tenants would prefer a subsidized rent structure.

The focus groups said that so many services and activities are available that they would benefit from a listing of them.

The *Developer* recommends uniform units. All but 16 of the units at Potiker are 350 square feet, but sixteen corner units are 450 square feet, which has created jealousies.

The *Developer* also recommends ensuring funding for services. In SCC's second permanent housing project in San Diego, a 150-unit affordable senior building, \$100,000 per year is included as part of the operating budget, because the City Redevelopment Authority was persuaded that services would be essential to the financial performance of the building.

Funding

Since this was the Senior Community Centers' first permanent housing project, they turned to the Corporation for Supportive Housing for guidance. That technical assistance led to a partnership between SCC and Chelsea Investment Corp. as co-developers.

Next, the Centre City Development Corporation, a representative of the Redevelopment Agency, secured the site for this project. The Corporation paid \$2.2 million for the property and sold it to the developers for a nominal amount. Facing a total development cost of \$18 million, the developers sought financing from a broad range of real estate finance and social service agencies from both the public and private sectors. They arranged financing, including 9% Federal Low Income Housing Tax Credits and other loans and grants. The San Diego Housing Commission loaned \$1.6 million with no payments as long as residual receipts go to services, which they do at \$100,000 per year. A grant from the Federal Home Loan Bank's Affordable Housing Program and a small permanent loan completed the financing for the project. The Potiker family donation paid off the predevelopment loan. An SCC board member who owns a physical therapy business donated the gym equipment.

Because of low debt payments, tenant rents support operating costs and some services. The remaining services are funded by San Diego County tobacco settlement funds, the Senior Community Service Employment Program (SCSEP) under Title V of the Older Americans Act, an earmark courtesy of Congresswoman Susan Davis for a second *Social Worker*, and fundraisers.

Tyrol Plaza Senior Apartments

Anaheim, California

Anaheim Supportive Housing for Senior Adults and A Community of Friends

The Organizations

Anaheim Supportive Housing for Senior Adults (ASHES) provides affordable apartment homes, transportation, and resident services coordination for older adults of low and moderate incomes. In addition to social and recreational programs often found in senior apartment communities, ASHSA's *Resident Services Coordinators* identify volunteer and employment opportunities for residents, as well as referrals to relevant public and private health and social services agencies. These services allow residents to maintain their individual and independent lifestyles and contribute to their communities.

A Community of Friends (ACOF) was founded in 1988 with the goal of developing housing for individuals and families with special needs. ACOF collaborates with community-based service agencies in offering residents a variety of on-site supportive services. Through this model, ACOF is able to provide housing for homeless, disabled and very low-income persons – creating permanent, affordable housing and an environment that promotes stability. ACOF has completed over 1,225 units in 33 properties, primarily throughout Los Angeles County, and has several properties in development. Twenty-eight (28) of the projects are currently in ACOF's portfolio.



The Project

Co-developers ACOF and Acacia Housing Advisors delivered Tyrol Plaza for occupancy on September 30, 2004. The property is owned by Tyrol Plaza, L. P., which has ACOF and ASHSA as general partners. Since this was ASHSA's first housing project, they retained Acacia Housing Advisors to act as developer in concert with ACOF. ACOF was included because their

extensive experience would benefit the project and improve the project's Federal Low Income Housing Tax Credit competition score.

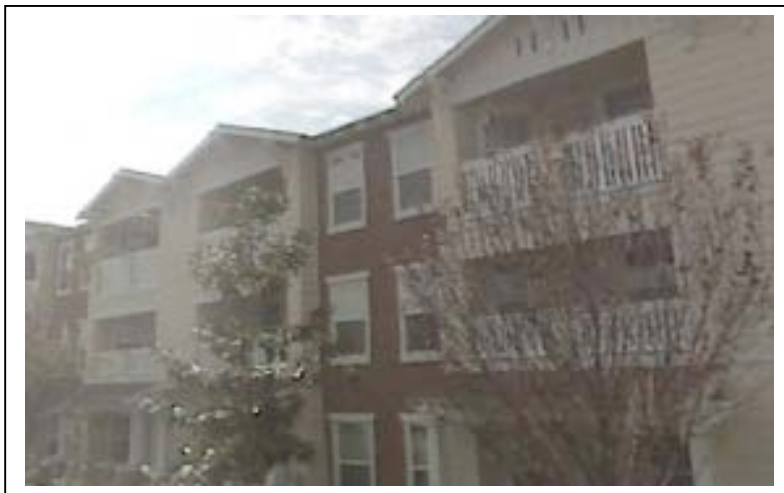
The developers set out to produce affordable senior housing, but chose to mix populations at Tyrol to attract the funding necessary to produce a high-quality product. By including special needs units, they maximized the project's score in the State of California competition for Federal Low Income Housing Tax Credits and secured grants from the Federal Home Loan Bank of San Francisco Affordable Housing Program and the Supportive Housing Program (SHP), funded by the U. S. Department of Housing and Urban Development (HUD).

Tyrol Plaza is composed of 60 units, including 54 one-bedroom units, five two-bedroom units, and a two-bedroom manager's unit. Fifty percent, or thirty, of the units are reserved for homeless or at-risk of homelessness applicants, of whom twelve participate in the Supportive Housing Program (SHP). All of the units reserved for homeless individuals are one-bedroom units.

All of the units except the manager's unit are restricted to incomes below specified percentages of Area Median Income (AMI): five units at 60% of AMI, 24 units at 50% of AMI, 18 units at 30% of AMI, and 12 units at 20% of AMI. In 2008, 60% of AMI income limit for a single person in Orange County, California, was \$39,060.

Located at 891 South State College Blvd in Anaheim, California, the building is adjacent to a municipal park and is close to public transportation and retail establishments; tenants particularly appreciate the supermarket and drug store a quarter mile down State College Boulevard.

Services are offered on-site. Three service personnel have offices on-site: a full-time *Resident Services Coordinator*, a 12-hour per week *Case Manager* for the SHP tenants, and a part-time *Caregiver* for the SHP tenants.



Physical Features

The Tyrol Plaza Senior Apartments is a three-story project in Anaheim, California, in north Orange County. The 60 units feature private porches or balconies, air conditioning, refrigerator, stove, and owner-paid utilities. The one-bedroom units are 550 square feet and the two-bedroom units are 700 square feet.

Both private units and community rooms offer views of the courtyard plaza or the street, creating at once a feeling of security and a connection with the community. The building is surrounded by single-family dwellings on three sides and by a municipal park on the other side. The building fits in with its surroundings, rather than dominating, through the use of features similar to the surrounding homes, such as pitched roofs, multiple exterior wall materials, and porches.

The L-shaped building surrounds a trellised garden plaza with tables, benches, BBQ area and 1,200 square-foot activities building with a kitchen. Community space includes laundry rooms on every floor, a ground floor living room and computer lab, a second floor television room, and a third floor game room with pool and ping-pong.

The design allows for good tenant interaction and for space for diverse service programs. All units and community areas are wheelchair-accessible from the sidewalk and 53-space parking lot. Tenants appreciate that the plaza and the parking lot are well lit. Tyrol Plaza does not permit smoking indoors, however, an area of the plaza is designated as a smoking area.

The main entrance is locked and has a buzzer system that allows tenants to talk with visitors by telephone from their apartments. The ground floor units may be accessed from the plaza, which in turn can be accessed from the street, but the *Developer* reports that there have been no burglaries.

The units reserved for the homeless tenants are the same as the units for the general population, except that the 30 special needs units have an emergency call system, as required by the State of California Federal Low Income Housing Tax Credit Program.

The *Developer* provided bedroom furniture for the 18 AHP units, accessing a used furniture program administered by the Mental Health Association (MHA) of Orange County.



Tenant Characteristics

All Tyrol tenants have low incomes. For 30 of the units, the minimum applicant age is 62. For the other 29 units, the minimum age is 55.

Of the homeless tenants, staff estimates that:

- 42% have a physical disability, but not a mental disability.
- 26% have a mental disability, but not a physical disability.
- 26% have both a physical and mental disability.
- 70% lived in homeless shelters before moving into Tyrol.
- 30% lived on the streets before moving into Tyrol.
- 40% were chronically homeless before moving into Tyrol.
- The most typical income sources are Social Security retirement and SSI.

Applicants are not required to disclose substance abuse, co-occurring disorder, or if they are living with HIV/AIDS, and staff declined to estimate percentages of tenants with these conditions.

The formerly homeless focus group participants reported living in shelters, cars, motels, and with family before moving to Tyrol. Shelter *Case Managers* referred them to Tyrol. One tenant said he watched Tyrol being built from the municipal park across the street. Tenants in the general population focus group reported a variety of living arrangements prior to moving to Tyrol. Living with family or in other affordable housing were most common. Those who lived in other affordable housing moved to Tyrol because of its superior amenities.

Requirements are the same for new applicants as for the original lease-up, so there has been no change in the composition of the tenant population in terms of prior living status. However, it was noted that some tenants' health has declined, an effect staff observed more often among formerly homeless tenants.

Property Management Staffing

Barker Management Incorporated provides property management services at Tyrol. A full-time *Property Manager* who lives in a two-bedroom unit is assisted by a half-time *Maintenance Person* and a half-time *Housekeeper*, who cares for the common areas.

Property Management and Leasing

The application process is nearly identical for the homeless applicants and the general applicants. As vacancies occur, the *Property Manager* faxes requests for referrals of applications to the Anaheim Housing Authority, specifically requesting homeless applicants, homeless applicants with disabilities, or general applicants. On-site social services providers verify eligibility for the units reserved for homeless and SHP participants. The *Property Manager* then performs a credit and background check and forwards the application package with verifications and

documentation to the Barker Management Incorporated Compliance Unit, which reviews the package and authorizes the offer of a unit. Other than the certification of eligibility for homeless and SHP units, there is no difference in the application process among the groups. Prompt processing of homeless applicants is essential, because the verification must show that they are homeless within seven days of the offer of a unit.

The *Property Manager* reports no differences among the groups in percentages of applicants who are screened out or drop out of the process. Occasionally, applicants drop out after they see the unit, because units are small, but more often, this desirable property sells itself.

The *Property Manager* does not announce to applicants how units are targeted. If an applicant has otherwise learned that formerly homeless tenants live in the building, the *Property Manager* uses that opportunity to dispel prejudices and “put reservations to rest.”

Property Management Challenges

The *Property Manager* reports that the formerly homeless tenants do tend to require more staff attention than other tenants, at least during an initial adjustment period. According to the *Property Manager*, formerly homeless tenants’ main problems, in order of priority, are:

1. Unauthorized guests,
2. Smoking, and
3. Disturbing other tenants.

The *Property Manager* reports that some formerly homeless new tenants require more attention during an adjustment period for issues such as storing property on balconies. The *Developer* agrees, noting that some formerly homeless tenants do not understand that personal habits, such as permanently parking disabled vehicles in handicapped spots or playing loud music, interfere with the enjoyment of the building by others. After an adjustment period, the *Property Manager* reports that there is no difference between formerly homeless tenants and other tenants. The most frequently occurring management challenges are unauthorized guests and violations of the indoor smoking ban. Infrequently, the *Property Manager* has dealt with issues of tenants disturbing each other, non-payment of rent, clutter, pet violations, and drug or alcohol-influenced behavior.

Rent payment issues are rare, with 98% of payments on time. The *Property Manager* has accommodated tenants who request a rent due date other than the first of the month to match their income receipt cycle. No tenants use representative payees. The *Property Manager* suggested use of a representative payee to one tenant, but he declined and has since become a good rent-payer.

The service providers report infrequent involvement with property management issues. They reported that they assist with problems of non-payment of rent two or three times per year. About twice annually, they deal with drug or alcohol-influenced behavior. Perhaps once per year, a tenant stops taking prescription medication, disturbs other tenants, and stops paying rent. Two formerly homeless tenants have brought friends from the adjacent municipal park to sleep

in their rooms. Some tenants with clutter habits find biannual unit inspection of smoke alarms traumatic. One formerly homeless tenant's devotion to feeding neighborhood cats is a currently unresolved management problem.

The *Developer* reports that there have been three property managers since Tyrol opened. The first two had good property management skills, but did not relate well to the formerly homeless tenants. The *Developer* believes the current property manager has the special skills necessary to work well with older formerly homeless tenants.

The *Property Manager* attributes her success to good communications and a clear delineation of responsibilities. "I'm about facilities and rent," she explains. "All other issues are for the *Case Manager*."

Supportive Services Staffing

Southern California Presbyterian Homes (SCPH) is the lead service provider. SCPH provides housing, health and support services for older adults to enrich their physical and social lives. A SCPH *Resident Services Coordinator* provides support for all 59 households. The SCPH *Resident Services Coordinator* directly provides case management, benefits advocacy, meals, emergency preparedness training, housing placement assistance, and living skills training. She makes referrals offsite for other education and training, employment and vocational services, legal assistance, medical care, mental health counseling and treatment, substance abuse counseling and treatment, support groups, and transportation.

In addition, the Community SeniorServ, Inc. provides a *Case Manager* for the 12 SHP units. Community SeniorServ and its predecessor agencies have a 35-year history of serving Orange County's older adults, providing comprehensive services essential to well-being and independence, including case management and meals.

The Community SeniorServ *Case Manager* works on-site 12 hours per week to provide support for the formerly homeless tenants, including education and training, meals and nutritional counseling, and living skills counseling. SHP also funds Accent Care to provide In-Home Supportive Services (IHSS) for the 13 formerly homeless residents with greater levels of needs, including with light cleaning in their units and assistance with meals, services that the *Property Manager* cites are very important to successful tenancies for the SHP tenants. As with her view of the *Case Manager*, the *Property Manager* would like to see expanded hours for the SHP *Case Manager*.

Supportive Services

Many activities at Tyrol are resident-led, including bingo three times per week, weekly movie night, games night, and the Resident Council (currently in hiatus). Other activities are supported by staff, including holiday potlucks.

The 12 older formerly homeless tenants with disabilities are entitled to Meals on Wheels paid for by the SHP program. About eight choose to participate, as do about 20 other tenants.

The SHP grant also funds two housekeepers who each work six hours per day, Monday through Friday, assisting the 12 SHP tenants with housekeeping, laundry and some cooking. About 12 other tenants receive similar assistance through the County of Orange In-Home Supportive Services (IHSS) Program, but typically receive only four hours per week in help.

Tyrol does not provide on-site medication assistance, money management or representative payee services.

Of the services provided, staff believe the most important in supporting long-term successful tenancies, in order of importance, are:

1. Case Management
2. Meals
3. Referrals and access to medical care
4. Living skills training
5. Benefits advocacy

The service providers report that formerly homeless tenants are an emotionally needy population and use services more often than the other tenants. They are used to being on their own, so they need help with the lease and house rules, which some feel are an infringement on their rights. The formerly homeless tenants are more likely to have clutter problems.

Service Efficacy

The service providers believe that their on-site efforts are extremely important in supporting long-term, successful tenancies. A good number of tenants do not have transportation and cannot navigate appointments. Through general advocacy, they help tenants have their needs served. As the *Case Manager* explained, "When frustration is minimized, success in living independently is maximized."

The *Property Manager* believes that services are essential to ensuring long-term successful tenancies, noting that the *Resident Services Coordinator* has skills that *Property Managers* do not, and that the *Resident Services Coordinator* knows the lease well and can explain the rules, which prevents lease violations.

The *Property Manager* cites referrals as the most important service the *Resident Services Coordinator* and *Case Manager* provide, but believes that being there to engage tenants is also important, so much so that the *Property Manager* would like to see the *Case Manager* work full time at Tyrol.

Tenant Satisfaction

Both formerly homeless and general tenants were satisfied with Tyrol, emphasizing the stability and security it provides. Both groups are grateful to the staff for showing concern and being accessible. The formerly homeless tenants were particularly effusive, calling Tyrol “heaven sent,” “like a penthouse,” and “a place where people take care of each other.” “I got my self-respect back,” said one, while another concluded, “I don’t think it could get any better.”

Mixed-Population Issues

Both focus groups reported that their neighbors in the building are good neighbors. All described a sense of support and camaraderie. Both focus groups explained that communication was difficult among monolingual English, Spanish, and Farsi speakers, and said they wished they could get to know neighbors whose language they could not speak.

While there are occasional disagreements among tenants, they involve cooking odors and smoking, rather than any factor related to prior living situation. Both groups recalled a tenant with a mental illness who acted out and was evicted, but did not generalize his behavior as typical of the homeless. No conflict or prejudice toward the formerly homeless tenants was reported. One general population tenant concluded, “everybody is nice.”

When asked their opinion of the building’s policy of mixing tenants with different backgrounds, both focus groups favored that approach. “It’s kind of cool,” said one general tenant, citing diversity as a benefit. “They took me in, so why not anybody else?” another concluded.

Recommendations from Tenants and Staff

While satisfied with the level of on-site services, the service providers would like to offer transportation, medication management, and medical services. What prevents them from offering those services is a combination of a shortage of funding and a surfeit of liability. The *Property Manager*, while favoring increased hours for the *Resident Services Coordinator* and *Case Manager*, is also satisfied, and believes that service provision is as effective with Tyrol’s mixed population as it would be in a building where all tenants are formerly homeless.

Both tenant focus groups valued on-site services and activities, but both felt that additional mental health counseling would be beneficial for some tenants.

The *Developer* believes that Tyrol Plaza was not opposed by its neighbors because they saw it as a senior building, not as special needs housing, and a senior building was preferable to the commercial development that could have occurred. The *Developer* believes that there would have been organized opposition to a special needs building presented as a special needs building.

The *Developer* has found that the Section 8 Project-Based and Tenant-Based Vouchers both ease the rent burden on low income tenants and improve cash flow. The *Developer* also found that, in the original lease-up, it was difficult to attract qualified applicants with incomes below the limit for the 20% AMI units.

Funding

Tyrol Plaza was developed at a total cost of \$9,805,000. The permanent funding sources are:

	SOURCES	AMOUNTS
9% Tax Credits	ESIC	\$6,250,000
30-year loan	CCRC	\$825,000
5-year loan	California Community Reinvestment Corporation (CCRC)	\$780,000
Agency loan	Anaheim Redevelopment Agency	\$750,000
Deferred Developer Fee	ACOF, Acacia Housing Advisors	\$500,000
Partner loan	ASHSA (SHP)	\$400,000
Subsidy/loan (AHP)	FHLBSF/Republic Bank	\$300,000
Operating Subsidy	Anaheim Housing Authority	Project-Based Section 8 Vouchers for 35 units and Tenant-Based Section 8 for most of the rest

The *Developer* reports that the California Community Reinvestment Corporation (CCRC) required a 5-year loan because the Anaheim Housing Authority Section 8 Project-Based Voucher contract was for only five years, the maximum permitted at the time of development by that program's funding agency, HUD. That in turn required the developers to defer most of their development fees until that loan is paid off in 2009. The *Developer* notes that HUD has since changed its rules and now allows 15-year Project-Based Voucher contracts.

Thirty of the Section 8 Project-Based Vouchers are assigned to the 20% AMI and 30% AMI units to maximize additional cash flow. The homeless applicants tend to qualify for the 20% and 30% units, but those units are not reserved for them. Five Section 8 Project-Based Vouchers are used with the 60% AMI units, which otherwise would have been hard to lease.

Funding for the *Resident Service Coordinator* is included in the project operating budget. The *Developer* believes that the *Resident Service Coordinator* supports project management and rent collection, so it makes sense that the expense is part of the operating budget.

HUD funds the Community SeniorServ *Case Manager* for the 12 Supportive Housing Program (SHP) units housing formerly homeless older adults with disabilities.

IV. WHY DEVELOP MIXED-POPULATION HOUSING?

A. Mixes and Motivations

We asked the Developers why they set out to develop mixed-population housing. While we heard five different answers, there were two themes: these Developers are mission-driven, but they also pursue available funding and accept the mandates that come with that funding.

The Potiker President & CEO explained that his organization seized an opportunity to create affordable permanent housing for clients of his senior day center when the city decided to fund replacement housing as part of a redevelopment agency project. His clients at the day center included homeless older adults, but he did not specifically target them.

Similarly, the Tyrol Developer did not set out to develop housing for the homeless, but for seniors. After his first application for Federal Low Income Housing Tax Credits was not funded, he included units designated for the homeless in his second application because the Federal Low Income Housing Tax Credit competition awarded extra points to projects including units for special needs populations.

The Franklin Executive Director said that the mission of his organization is to house people with mental disabilities in permanent housing, rather than in shelters or institutions. He recalled that the first time he saw a mixed-population building, he knew it was an appropriate environment and has been creating mixed-population housing since.

The President said he mixed populations at 1212 MLK out of philosophy and practicality. Philosophically, he believes it is important to try new models of helping people to live independently. Practically, the Federal Low Income Housing Tax Credit competition included points for including units for special needs tenants. The city offered to provide Section 8 Vouchers, which would provide a revenue source for services the special needs tenants would need (see explanation below). He included units for persons with developmental disabilities because the State program and funding made sense.

The Amistad Developer said that her organization's mission is to develop housing for individuals and families with special needs. They proposed Amistad as a mixed-population project because they believed the neighborhood was so desirous of affordable housing that it would support the project, seeing it as affordable housing, rather than housing for homeless with mental disabilities.

B. Shortage of Permanent Housing for the Homeless

For some homeless families, affordability of rent is the only issue. Tenant-based rental assistance supporting units in the regular rental market can work well for these families (Shelter Partnership, 2007).

For many homeless individuals and families with special needs, however, barriers to re-housing extend far beyond affordability. Even with Section 8 Vouchers, such individuals and families cannot convince a landlord to lease to them, because of poor rental and credit histories. For these individuals and families, the solution must involve a landlord whose mission is to house them, and who provides the services they need.

C. Perception of Ghettoized Special Needs Populations

Steve Coe, Executive Director of Community Access and the Developer of Franklin, spoke forcefully about this issue. In his career, he has worked with housing with 100% of units dedicated to persons with mental illness and with mixed-population housing. He says that tenants in buildings with all units reserved for persons with disabilities inevitably feel labeled and institutionalized. Further, he believes that people live up to the standards they see around them.

Martin Dunn, President of Dunn Development and Developer of 1212 MLK agrees, and argues that it is natural for people to live in groups that include children. He therefore supports a mixed-population model in which working families and formerly homeless individuals share a building.

The Services Director at Tyrol concurs, observing that, "Real life is homogenized with all kinds of people getting along; it is great that we all learn from each other." She said that there would be more problems if the formerly homeless were segregated.

D. Need for Supportive Services

The Developers, Property Managers, and service providers we interviewed unanimously agreed that services are essential to successful tenancies for formerly homeless tenants. The tenant focus group participants also thought services are important. (Some participants said that they personally did not need services, but that services were important for other tenants.) Four of the five Developers said that providing services on-site was most effective, while the Steve Coe, Executive Director of Community Access, said he would prefer services to be provided off-site, but that it worked fine to have the Case Manager on-site at Franklin.

Two of the Developers described building histories that demonstrate the need for services. The Potiker senior building in San Diego opened with limited services on-site and experienced large numbers of tenants who isolated from their neighbors. The Property Manager struggled with problems of rent collection and other lease violations. To his credit, the Developer recognized the issues and raised funds to staff on-site case management positions. The current Property Manager credits the Case Managers with stabilizing the tenant population, facilitating property management, and generally improving the lives of the tenants.

At 1212 MLK in New York City, the Property Manager struggled with rent collection from the formerly homeless tenants, even though property management was staffed at a higher ratio than is typical for apartments. Without case management, the formerly homeless tenants seemed unable to manage their money in ways that allowed them to pay rent. Absent support, evictions

would result. A Case Manager is now rectifying the situation by helping the formerly homeless tenants apply for and receive income supports for which they qualify, such as food stamps.

E. Market Inclusion

One Developer said that, in his experience, buildings devoted solely to single individuals inevitably are labeled “facilities” and provoke a negative community reaction, so the mixed population has a marketing advantage. In contrast, all the Developers said that mixed-income buildings are viewed as affordable housing, which was seen by the neighbors as a desirable addition to the neighborhood. Specifically, the senior buildings were presented and viewed as senior housing and the family projects as affordable housing or workforce housing. In each case, the community agreed that there was a need for that type of housing, and supported the development.

F. Affordable Mix

The Federal Low Income Housing Tax Credit program favors ranges of affordability levels. To qualify for Federal Low Income Housing Tax Credits, Developers are required, at a minimum, to rent 40 percent of their units to tenants with incomes equal to or less than 60 percent of the area median income, or to rent 20 percent of their units to tenants with incomes equal to or less than 50 percent of the area median income. Often, state agencies administering the program establish incentives or requirements for targeting at other percentages of area median income (Corporation for Supportive Housing, 2005). It is not unusual for tenants whose incomes are low enough to qualify for the income targets will have difficulty paying rent, especially if their incomes decrease or they experience competing demands for their limited incomes.

The Developers we interviewed said that including units for special needs populations can address this challenge, because special needs populations meet the lowest Federal Low Income Housing Tax Credits income restrictions, and can be supported by rent subsidies from housing authorities and state agencies. Developers agree to reserve some units for special needs populations in exchange for subsidy commitments. Mixed-population housing therefore allows Developers to meet the mixed-income obligations of the Federal Low Income Housing Tax Credits program while making it possible for the lowest income tenants to pay the rent.

V. DOES MIXED-POPULATION HOUSING WORK?

A. Do affordable housing Developers have the capacity to design and finance properties that will meet the needs of all residents?

The Developers in our study clearly have produced housing that meets the needs of all residents. The consensus of all the tenant focus groups was that both formerly homeless and general tenant needs are being met. While the tenants often had suggestions about security and requests for more activities, tenants were generally satisfied with the property, maintenance, services, and activities. In most cases, they were enthusiastically positive about the building meeting their needs.

These five apartment buildings were produced by a variety of development teams, including veteran Developers, a first-time Developers non-profit collaborations, and for-profit/non-profit collaborations. The five Developers chose a variety of tenant mixes. What is consistent among all five developments is that the projects were well planned. The Developers all described planning that considered the site, neighborhood, design appropriate to the targeted populations, and appropriate services to meet the needs of all tenants.

B. What are the impacts of the mixed-populations on the financial stability of the properties?

In three of the buildings we studied, the units reserved for formerly homeless tenants have project-based rental subsidies. A fourth building has access to tenants-based subsidies when a homeless applicant leases. And the fifth is currently working with its local housing authority to receive project-based subsidies. These rent subsidies not only make it possible for the lowest-income homeless applicants to rent these units, but also improve cash flow for the property.

All the five developments we studied were funded in large part with 9% Federal Low-Income Housing Tax Credits, which ensures affordability for households of low income. The Federal Low Income Housing Tax Credit program requires that units be leased to households with incomes below specified levels, and that those tenants pay specified rents that are well below market rates. Formerly homeless individuals and families with special needs, however, often have incomes so low that even Tax Credit rents are unaffordable to them. To address this, four of the five projects have accessed rental or operating subsidies, and the fifth is pursuing them. The Developers have accessed a variety of subsidies, including state and city subsidies for tenants with special needs and Project-based and Tenant-based Section 8 Vouchers. The only one of the five developments without subsidies recently received negative local press when tenants complained about rent increases the Developer processed in accordance with Tax Credit program rules. That Developer is now working with his local housing authority to secure Project-based Section 8 Vouchers for thirty units in the development, which he will use for his most heavily rent-burdened tenants.

When tenants in Federal Low Income Housing Tax Credit projects also have rent subsidies, the subsidies allow tenants to pay rents below the rents required by the Tax Credit program, while

the rent subsidy plus the tenant rent exceeds the “Tax Credit rent.” Therefore, when rent subsidies are available, the cash flow to the project is greater.

In all cases, the rent subsidies were awarded specifically because the Developer committed to leasing the subsidized units to homeless households, so the presence of homeless households in these projects improved the projects’ financial condition. Several of the Developers we interviewed said they used some of this positive cash flow to fund social services of their developments.

We explored whether rent collection was an issue among the formerly homeless tenants. In four of the five buildings, there has been no difference in rent payments between the general population and the formerly homeless tenants. Two of those reported no rent collection issues at all. A third solved a rent arrearage issue with both formerly homeless and general population tenants by referrals of delinquent tenants to the Case Manager and through incentives. The fourth reported that both general population and formerly homeless tenants could have difficulty paying rent because even 30% of income is a significant amount for extremely low-income tenants.

At 1212 MLK, rent collection has been a major, ongoing issue among the formerly homeless tenants, with 11 of 17 formerly homeless tenants in arrears. Both the Property Manager and the Case Manager attribute this to the formerly homeless not being accustomed to budgeting and managing their money. The Property Manager said that tenants delinquent in rent usually explain that food costs have increased, so they do not have enough money for rent. Significantly, this problem developed when the Case Manager position was not staffed. The Developer, Property Manager, and Case Manager believe that the newly-arrived Case Manager will solve the problem by assisting the formerly homeless tenants in accessing entitlements, especially Food Stamps, and by coaching them in budgeting and money management.

Whether or not they have experienced rent collection issues, none of the five buildings required or even advocated for representative payee systems. The Franklin Property Manager explained they did not require it as an issue of self-determination. Other Property Managers and Case Managers reported occasionally recommending representative payees to specific tenants. Although most tenants decline the suggestion, they continue to recommend it when they believe it appropriate. Only Potiker reported significant numbers of tenants using representative payees, but said that only general population tenants use representative payees.

C. What impact does the inclusion of units for formerly homeless people have on property management and day-to-day operations?

We asked Property Managers to rank the most challenging property management issues they confronted involving their formerly homeless tenants. All responded with at least three issues, although one said there were no differences in property management issues between general population tenants and formerly homeless tenants. We summed the Property Manager rankings:

Table 2: Weighted Ranking of Most Challenging Property Management Issues

RANK	SERVICE
1	Disturbing Other Tenants
2	Unauthorized Guests
3	Nonpayment of Rent
4	Unable to Live Independently
5	Drug/Alcohol-Influenced Behavior
6	Clutter
7	Smoking

One Property Manager said that there was no difference in behaviors between formerly homeless tenants and general population tenants. Two of the Property Managers said that after an adjustment period, there were no differences in the amount of time it took to address property management issues between the two groups. Two of the Property Managers reported ongoing differences in the amount of time it took to address property management issues between the two groups, but added that on-site case management helped to mitigate the issues. While noting that they are sensitive to the needs of formerly homeless tenants, all the Property Managers interviewed said their jobs were made easier by the social services staff on site.

The Property Managers appreciated two benefits accruing from the accessibility of professional social services staff. First, it allowed the Property Managers to focus solely on the property management issues of rent collection and maintenance, rather than dealing with tenant behaviors, typically a difficult part of property management.

Second, the Property Managers found that their traditional property management responsibilities were supported and facilitated by the work of the social services staff. For example, Property Managers typically spend a large portion of their time on issues arising from non-payment of rent, especially if eviction results. In such instances, Property Managers must prepare and serve a series of notices, maintain documentation, make court appearances, and ultimately prepare and rent the unit to a new tenant. When the Property Manager is instead able to refer the tenant to social services staff to resolve the issues that lead to the non-payment, the Property Manager is spared the work of the eviction and re-renting. Of course, the tenant also benefits by remaining housed. All the Property Managers we interviewed recognized these dual benefits.

Significantly, the only Property Manager who reported significant rent collections problems unique to his formerly homeless tenants works in the building that has been without on-site case management until recently. And that Property Manager predicts improvement in rent collections and lease compliance, now that a Case Manager is working at the building six days per week.

One issue unique to mixed population buildings is what to tell applicants about the mixed populations. The Property Managers handled that in different ways. The two buildings in the Bronx inform applicants that the building has mixed populations. The Franklin Property Manager is open about the fact that there are single tenants in the building who have a history of

homelessness, psychiatric disability or conviction for crimes. The 1212 MLK Property Manager specifically describes tenants with developmental disabilities and asks applicants how they would feel about living with people with developmental disabilities.

In contrast, the three California buildings do not inform applicants that the building has mixed populations. The Potiker Property Manager said that they do not discuss the make-up of the tenant population with any other applicant or tenant, just as she would not reveal such information about any individual applicant or tenant. She believes that Fair Housing Law prohibits such disclosure. Similarly, the Tyrol Property Manager does not announce to applicants how units are targeted. If an applicant has otherwise learned that formerly homeless tenants live in the building, the Tyrol Property Manager uses that opportunity to dispel prejudices and “put reservations to rest.” The Amistad Property Manager also does not disclose that some tenants were formerly homeless during its leasing process. Some of the Amistad tenants in both focus groups reported knowing during the application process that a portion of tenants had special needs. In some cases, this disclosure seems to have occurred through the referring agency.

In all cases, tenants after move-in learn about the prior status of at least some of their neighbors by word of mouth.

D. Does mixing populations complicate provision of supportive services for formerly homeless people?

No one that we interviewed believed that services for formerly homeless tenants have been in any way diminished because of the mixed population approach. Some Property Managers and service providers said that service provision was improved by the mixed population approach; they expressed the belief that formerly homeless tenants benefit from living with general population tenants who serve as role models for appropriate behavior. Further, some service providers and Developers believed that buildings with all units reserved for special needs tenants inevitably have an institutional air that complicates recovery by communicating to tenants that they are disabled and different from “normal” people.

All of the service providers said that on-site case management was preferable to off-site, because tenants come to trust the Case Manager they see routinely and because the accessibility of on-site Case Managers makes it more likely that tenants will use their services. (One Developer, however, believes that it would be better to provide case management off-site to enhance the “regular housing feel” of projects and to better protect confidentiality of tenants.)

In a mixed population building, it is possible to have so few special needs tenants that the expense of on-site case management cannot be justified. In the five buildings we studied, all the service providers believed that the number of formerly homeless tenants in their buildings was sufficient to require on-site case management.

E. Do the Populations Get Along?

Of all the questions for which we sought answers in this study, this one was answered most emphatically and consistently. With only one exception, the tenants in the five buildings we visited expressed no reservations about the formerly homeless tenants or other special needs tenants. Most said that there was no difference between the formerly homeless tenants and the general tenants or that they had no idea about other tenants' backgrounds. The general population tenants in our focus groups said that they had experiences with bad neighbors in other apartment buildings. They explained that such issues were to be expected as a part of apartment life and had nothing to do with having been homeless.

The exception was a concern at a senior building about bedbugs. Some tenants in the general focus group believed that formerly homeless tenants brought bedbugs with them when they moved in. They hastened to add that they were not opposed to homeless people moving in; they just believed that management should make sure there are no bedbugs.

The Developers, Property Managers, and service providers concurred, explaining that many of the general population tenants contend with the same issues as the formerly homeless tenants. For example, the service providers in the two senior buildings said that many seniors, homeless or otherwise, live with undiagnosed mental illness, especially depression.

Many tenants in our focus groups said they valued the diversity of living with neighbors with different backgrounds, including people with disabilities. The general tenants often stated that they admired the formerly homeless tenants for getting off the street. Mothers in particular said that they wanted their children to learn to live with diverse people. They said that it was important for their children to understand differences in the backgrounds and lifestyles of others.

In almost all cases, the formerly homeless tenants and the general population tenants were made aware during the interview process that the building would be in some way "mixed" with population types, but not necessarily that the population type was formerly homeless. The Property Managers advised us that there was little if any reticence among the general population to live with people who had experienced difficult lives, such as people who may have mental illness, substance abuse histories, or even interaction with the criminal justice system. These tenants simply were looking for a more affordable housing option than their situation at the time, in a safe and secure building in a decent neighborhood, and found it.

Furthermore, Property Management and Social Services staff, as well as the formerly homeless and the general tenants thought that mixing populations was a very positive undertaking and that it lessened the stigmatizing of the formerly homeless and provided them with positive role models that they could emulate. Furthermore, the formerly homeless individuals who lived with families were extremely upbeat about having young people in their community.

F. Does on-Site Service Provision Support Long-Term Tenancies?

The Property Managers spoke most emphatically to this point. Without on-site services, lease violations would lead to evictions. We did find that in several of the buildings, there were

problems with rent payments for both the formerly homeless tenants and the general tenants that were addressed in various ways.

Property Managers explained that, in the absence of supportive services, the only tool they have to enforce the lease and collect the rent is to threaten and carry out evictions. When the Property Manager is instead able to refer the tenant to social services staff to resolve the issues that lead to lease violations, the breach of the lease can be resolved without an eviction. The Property Managers said that without on-site case management, more tenants would have been evicted, noting that many formerly homeless tenants initially became homeless because they were evicted for lease violations. On-site case management prevents that from happening again and thus supports long-term tenancies.

We asked the Case Managers to rank the services they believed were most important in maintaining long-term stable tenancies and tallied their responses:

Table 2: Weighted Ranking of Services Deemed Most Important by Case Managers

RANK	SERVICE
1	Case Management
2	Medical Care/Medication Management
3	Money Management
4	Meals/Food
4	Living Skills/In Home Supportive Services
6	Mental Health Services
7	Benefits Advocacy
7	Substance Abuse Counseling
9	Social and Recreational Activities
9	Transportation

Not surprisingly, the Case Managers suggested that case management is the most important service supporting long-term tenancies. The Case Managers also highly ranked access to medical care and medication management, money management, and help with living skills and in-home supportive services to allow independent living. The senior buildings ranked meals and food as highly important.

G. How does this type of resident mix affect all residents?

The availability of on-site services benefits the general population as well. While the on-site service providers spend most of their time assisting the formerly homeless tenants, they are available to assist general population tenants. General population tenants in the two senior buildings took advantage of this opportunity to a much greater degree than did the tenants in the family buildings. This may be because seniors are more likely than younger adults to face health and service challenges. Indeed, the Developer of one of the senior buildings stated that the needs of the general population tenants are the same as the formerly homeless tenants. He believes that

some of his general tenants were on the cusp of homelessness before they moved into his building.

In one case, services were initially restricted to the designated special needs households only as a condition of the funding source. Because the Case Manager was particularly adept at employment services, some general population tenants desired that service, but the Case Manager could not provide it for them because of the grant restriction. That grant expired, and the Developer now funds a Case Manager who can assist all of the tenants seeking such assistance.

H. What are the ingredients that might make Mixed-Population Housing successful?

The five projects we reviewed demonstrated the elements one would expect in any successful rental housing: good design and construction, financial viability, and strong property management. They also provided appropriate, accessible services. We observed several additional elements that make these projects work as mixed-population housing.

All Developers, Property Managers and Case Managers we interviewed said Case Managers are essential to long-term tenancies among formerly homeless tenants, and all but one Developer said that it is important to provide those services on-site. Tenants in both formerly homeless and general focus groups also praised on-site Case Managers, noting that they are accessible, solve small problems before they become large, and help tenants access services the tenants could not access on their own. The case for case management was perhaps most persuasively made by its absence; in the one project of the five we studied that went without case management, most of the formerly homeless tenants fell into rent arrears. The Property Manager at that site expects that situation to be remedied now that a Case Manager is working six days per week.

All Developers we interviewed said it is important to assure that property management is committed to the mission of supporting long-term stable tenancies. They emphasized that just being good at property management is not enough; Property Managers must approach the job with an intention to support long-term tenancies. This can require different approaches to lease violations than is typical in managing rental property, and certainly requires commitment to communication with Case Managers. Developers, Property Managers, and Case Managers agreed that good property management is essential to their success in housing formerly homeless tenants. The Property Manager must take action to remedy lease violations to maintain standards of behavior for all tenants, but not by relying solely on the traditional tools of notices and eviction actions. One Developer explained that his original management company was not able to make that adjustment, so he switched companies.

Tenants in our focus groups also described how important Property Managers are to their enjoyment of their homes, contrasting Property Managers from the past with the current Property Managers whom they appreciate.

Property Managers and Case Managers heaped praise on each other for good communications. Case Managers appreciated the “early-warning” function that Property Managers perform by letting the Case Managers know when tenants do not pay the rent on time or otherwise violate

the lease. And the Property Managers believe that their jobs are facilitated by the interventions of Case Managers.

Property Managers also emphasized the importance of clear roles between themselves and Case Managers. “I’m about facilities and rent,” one Property Manager explained. “All other issues are for the Case Manager.”

All Developers, Property Managers, and Case Managers said that all activities for residents are open to all residents. Our focus groups concurred that all community activities are open to all tenants and in fact include tenants from both the formerly homeless and the general population. All Developers, Property Managers, and Case Managers said that they would plan such activities only to include all interested tenants. One Developer proudly described a Thanksgiving feast coordinated by a formerly homeless tenant and enjoyed by tenants of all backgrounds. Another said that formerly homeless tenants coordinate an annual Halloween party.

Everyone we interviewed stated that individual tenants have a right to privacy and that the backgrounds of individual tenants would never be discussed with other tenants. All had policies of absolute confidentiality regarding tenant information and backgrounds. The Franklin Developer said this issue is so important that he would prefer that Case Manager offices be off-site or at least in the basement, so tenants accessing services would not be observed doing so by their neighbors. (Franklin’s services offices are on the ground floor, which he acknowledged has been effective.)

I. What are the ingredients that might make Mixed-Population Housing more challenging?

There are a number of reasons why mixed-population housing could be more challenging than other supportive housing.

Property management deficiencies or security issues could become incubators for tension between formerly homeless and general population tenants, although we found no incidents of this at the five sites we studied. While the tenants in all our focus groups reported that they liked their buildings and their neighbors, they also expressed concerns. All concerns related to the facility, not to the population mix. Security and fire safety were most often mentioned. Tenants in buildings without 24/7 front desks wanted improved front door security of the types they have seen in other buildings that would let them see on their televisions visitors at the front door. Tenants were aware that elevators would not operate in a fire and worried for tenants with mobility impairments on upper floors.

Property Managers today are justifiably concerned with compliance with Fair Housing Law. In fact, many of the Property Managers we interviewed described their policies and procedures as required by Fair Housing Law. Having two sets of procedures for processing applications from different population groups could raise perceptions of such issues. This requires Developers to be aware of the fair housing implications in structuring projects; federal and state funds come with different fair housing rules. Federal rules in particular make it challenging to target persons with specific disabilities. Fortunately for the Developers in our study, the federal funding program they employed, the Federal Low Income Housing Tax Credits program, does not trigger

the federal rules the most restrictive federal rules. The Developers and Property Managers we interviewed did not report experiencing fair housing problems.

Four of the five properties we studied have at least two sources of applicants for their mixed-population housing (The fifth, Potiker, uses its Adult Day Health Center as a source of applications, which results in about half of Potiker tenants having been homeless.) Having two applications sources could seem to be an administrative burden, but none of the Property Managers we interviewed reported that. Rather, they reported that leasing to homeless applications was facilitated by working closely with referring agencies and with the social workers at those agencies.

We hypothesized that mixed-population buildings with a variety of sources of rent and subsidies might experience more accounting challenges than buildings with a single rent and subsidy. No one we interviewed raised this a problem. In fact, all Developers we interviewed who have units without subsidy welcomed additional tenant-based subsidies, noting that the higher income the subsidies provide can be used to support services.

Finally, we had concerns that we would have seen that some of the developments have insufficient funding to provide adequate supportive services. While we did find that there had been some “bumps” in the road, and that many of the Property Managers, Case Managers, and tenants at specific developments expressed a “wish list” if they had additional funding for services, all of the developments were operating reasonably well with the supportive services and staff that they do have.

J. Why is this mixed population solution a better or worse model than stand-alone supportive housing?

One Developer said that, in his experience, buildings devoted solely to single individuals inevitably are labeled “facilities” and provoke a community reaction, so the mixed population has a marketing advantage. In contrast, all the Developers said that mixed-income buildings are viewed as affordable housing, which was seen by the neighbors as a desirable addition to the neighborhood. Specifically, the senior buildings were presented and viewed as senior housing and the family projects as affordable housing or workforce housing. In each case, the community agreed that there was a need for that type of housing, and supported the development.

That Developer also said that it is important for the special needs tenants to see models of normal living because people aspire to the level of behavior they see around them. For that reason, he prefers mixed population buildings. In particular, he believes that children create a healthy atmosphere, so families should be included in mixed-population housing including units for special needs populations.

We heard repeatedly in the focus groups that it is normal to live with a diversity of neighbors. We also heard that there are problem tenants everywhere; there were no more or no fewer problem tenants in these mixed-population buildings than there were in other buildings the focus group participants had lived in, both affordable and market rate.

VI. KEY IMPLICATIONS AND QUESTIONS

A. There Is No Single Best Solution

All five developments we reviewed meet criteria for success as rental housing and as a solution for homelessness. While all five mixed formerly homeless tenants with general population tenants, there are differences in their approaches:

- The percentage of units reserved for formerly homeless ranged from 24% to 67%.
- Two reserve specific units for homeless applicants, while three have no such restriction.
- Three have specific numbers of units reserved for homeless applicants, while two do not.
- Four of the Developers are non-profit, while one is for-profit.
- Services are provided by employees of the Developer at three sites and contracted at two.
- Property management is contracted out at four sites and provided directly at one.
- Two Property Managers inform applicants of the mixed populations, two only describe that if asked, and one considers any discussion of tenant backgrounds inappropriate.

B. Mixed-Population Housing Can Have a Role in Ending Homelessness

While there are differences in approach, more striking are the similarities:

- All provide on-site case management and other services appropriate to their target populations.
- All secured or are pursuing rent or operating subsidies for formerly homeless tenants.
- All developed the projects with 9% Federal Low Income Housing Tax Credits.
- All include all tenants in community activities.
- All describe excellent communication between Property Managers and Case Managers.
- All offer case management and other services on-site.
- All have sufficient numbers of formerly homeless tenants to justify on-site case management.
- All follow strict rules of confidentiality of tenant information.
- There are no tenant reports of inter-group conflict.
- All report low turnover among both formerly homeless and general population tenants.
- Three of the Property Managers expressed the sentiment that after an adjustment period, there were no differences in the amount of time it took to address property management issues between the two groups--formerly homeless and the low-income population. Two of the Property Managers did report an ongoing difference in the amount of time it took to address property management issues between the two groups, but added that on-site case management helped to mitigate the issues.

APPENDICES

A. Selected Sources

B. Interviews

C. Questionnaires

C.1. Property Manager Survey

C.2. Social Service Provider Survey

C.3. Homeless Focus Group Questions

C.4. General Focus Group Questions

C.5. Developer Survey

C.6. Property Abstract

APPENDIX A: SELECTED SOURCES

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APPENDIX B: LIST OF INTERVIEWEES

1212 MLK Apartments

Developer Survey:

Martin Dunn, President, Dunn Development Corporation

Property Abstract:

Ben Kornfeind, Associate, Dunn Development Corporation

Property Manager Survey:

Kerry Branch, Site Manager, Prestige Property Management

Social Service Provider Survey:

Joseph Esheyigba, Social Worker, Volunteers of America

Amistad

Developer Survey:

Lee Milman, Director of Housing & Development, ACOF

Property Abstract:

Lee Milman, Director of Housing & Development, ACOF

Property Manager Survey:

Shola Giwa, Director of Asset Management, ACOF

Zobeida B. Gonzalez, Community Manager – Amistad Apartments, JSCO

Social Service Provider Survey:

Dorene Toutant, Director – Residential Services, ACOF

William Membreno, Outreach Coordinator, ACOF

Franklin Avenue Apartments

Developer Survey:

Steve Coe, Executive Director, Community Access

Property Abstract:

Maggi Knox, Director of Project Development, Community Access

Property Manager Survey:

Joanne Boger, Director of Property Management, Places Plus, Inc.

Social Service Provider Survey:

Lolita Jefferson, Deputy Director of Supportive Housing, Community Access

Anna DeLeon, Program Director, Community Access

Is Mixed-Population Housing a Solution to Homelessness?

Shelter Partnership, Inc.

January 2009

Potiker

Developer Survey:

Paul Downey, President & CEO, Senior Community Centers

Property Abstract:

Leslie Cox, Community Manager, Hyder Property Management

Property Manager Survey:

Leslie Cox, Resident Manager, Hyder Property Management

Social Service Provider Survey:

Mary Mazyck, Vice President of Programs and Services, Senior Community Centers

Dennis Dearie, Older Adult Rehabilitative Specialist, Senior Community Centers

Tyrol

Developer Survey:

Gary Frazier, Acacia Housing Advisors

Property Abstract:

Gary Frazier, Acacia Housing Advisors

Property Manager Survey:

Lynda Fields, Resident Manager, Barker Property Management

Social Service Provider Survey:

Linda Klein, Case Manager, Community SeniorServ

Lorena Romo, Resident Services Coordinator, Southern California Presbyterian Homes.

**Shelter Partnership
BRIDGE Mixed Population Study
Property Manager Survey**

I. General Information

Property Management Company:

Project:

Project Address:

City:

Zip Code:

Primary Contact Name:

Primary Contact Title:

Primary Contact Email:

Primary Contact Phone:

Other Contact Name:

Other Contact Title:

Other Contact Email:

Other Contact Phone:

II. Property Management Staffing and Services

1. Please list all property management staff members providing on-site services to the project's residents:

Number of FTE Positions	Title	Service Provider
<i>e.g. 2.0 FTE</i>	<i>Resident Manager</i>	<i>Property Management, Inc.</i>

2. Resident manager to tenant ratio:

1 Resident Manager to _____ tenants

3. Do property management staff know which tenants are formerly homeless?

Yes ☐ No ☐

4. Are there any property management procedures or policies that are different for formerly homeless tenants than for other tenants?

Yes ☐ No ☐

5. If yes, what are those procedures or policies?

III. Leasing

6. How many units are reserved for homeless applicants? _____

7. Are the units reserved for homeless applicants specific units, or could homeless applicants live in any units? (Please check one.)

Specific units ☐ Any units ☐

8. If specific units, are those units:

☐ Of a specific bedroom size ☐ On a specific floor
☐ In one area of the building ☐ Otherwise specifically located

9. Please describe the method for deciding which units are made available to homeless applicants:

10. Which of the approaches to applications and wait lists do you employ? (Please check all that apply.)

	Applicants	
	Formerly Homeless	Other Applicants
Continuously open for applications	<input type="checkbox"/>	<input type="checkbox"/>
Intermittently accept applications	<input type="checkbox"/>	<input type="checkbox"/>
Lottery	<input type="checkbox"/>	<input type="checkbox"/>
Waiting list	<input type="checkbox"/>	<input type="checkbox"/>
Referrals	<input type="checkbox"/>	<input type="checkbox"/>
Other	<input type="checkbox"/>	<input type="checkbox"/>

11. Do you maintain separate waiting lists or referral sources for your units targeted to homeless applicants?

Yes ☐ No ☐

12. For your units targeted to homeless applicants, are there different eligibility rules or different requirements for documentation and verification of eligibility?

Yes ☐ No ☐

13. If yes, please describe the different rules:

14. Is another organization or organizations involved in leasing to homeless applicants?

Yes ☐ No ☐

15. If so, what organization and what is the process?

16. Is it more time-consuming or challenging to lease to homeless applicants?

17. What percentage of your applicants lease units, rather than dropping out of the process or being screened out? Please estimate percentages (Percentages should add up to 100%):

	Homeless Applicants	Other Applicants
Lease	%	%.
Drop out	%	%
Screened out	%	%
Total	100%	100%

18. What other issues complicate leasing to homeless applicants?

19. Where were your formerly homeless clients living before they became tenants in your building? (Please estimate percentages.)

_____ % Homeless shelter

_____ % Transitional housing

_____ % Streets

_____ % Jail or prison

_____ % Hospital

_____ % Other institutional setting

_____ % Other:

_____ % Other:

_____ % Other:

100% TOTAL

20. Have there been any changes in the overall client population since initial project occupancy?
Any changes in the client population over the last year?

21. When tenants first moved in, did the non-homeless know that other tenants would be formerly homeless?

Yes ☐ No ☐

22. What was the policy on confidentiality of homeless status?

23. Were there potential tenants who were not willing to rent because of homeless tenants?

Yes ☐ No ☐

24. If yes, what reasons did they give?

IV. Property Management Issues

25. In your experience, do homeless clients require more or less property management staff attention than other clients?

Yes ☐ No ☐

26. Why do you think this is the case?

27. After an adjustment period, are there differences in property management service need between formerly homeless and other tenants?

Yes ☐ No ☐

28. If yes, what are the differences?

29. Are there differences in the way you deliver property management service for formerly homeless tenants and other tenants?

Yes ☐ No ☐

30. If yes, please explain:

31. How often do these management challenges occur? Please rank by frequency (e.g. Enter “1” next to the challenge that occurs most often, a “2” next to the challenge that occurs second most often, and so on). For challenges that never occur, please enter “NA.”

	<u>Formerly Homeless</u>	<u>Other Tenants</u>
Non payment of rent	_____	_____
Disturbing other tenants	_____	_____
Drug/alcohol-influenced behavior	_____	_____
Unauthorized guests	_____	_____
Unable to live independently	_____	_____
Illegal activity in unit	_____	_____
Pet violations	_____	_____
Clutter	_____	_____
Other: _____	_____	_____

32. What changes have you made in property management service delivery since the project opened?

33. Do you require your formerly homeless tenants to use a representative payee as a condition of leasing?

34. If not, do you encourage your formerly homeless tenants to use a representative payee?

35. How many of your formerly homeless clients have a representative payee?

36. To what extent is rent payment a problem for your clients?

37. Are there or have there been issues between formerly homeless and non-homeless tenants?

Yes ☐ No ☐

38. If yes, what are or were the issues?

39. Has anyone moved out because of homeless tenants? What were their reasons?

40. Why do you think you have been successful in supporting long-term, successful tenancies for formerly homeless residents (e.g. approach of property management staff, nature of homeless population, on-site social service provider, physical access, etc.)?

41. Are there community activities (formal or informal) that homeless and non-homeless tenants participate in together? Please describe:

42. Do property management staff make efforts to engage tenants with on-site social services staff? Yes ☐ No ☐

43. If yes, what techniques do they use?

V. Services-Related Questions

44. How important are your on-site social services to long-term successful tenancies? How do the on-site social services benefit the tenants and the functioning of the building?

45. How satisfied are you with the quantity and quality of on-site social services being provided to your tenants by the on-site service provider?

46. What changes have been made in on-site social service delivery since the project opened?

47. How have those changes benefited the tenants and the functioning of the building?

48. What changes would you like to see in the on-site social service delivery system?

49. Which of the on-site social services are most important in maintaining long-term stable tenancies? Please list top five services.

1.

2.

3.

4.

5.

50. Are any on-site social services restricted to formerly homeless clients?

Yes ☐ No ☐

51. If so, have there been or are there any issues due to these restricted services? What are or were those issues?

52. Would service provision be more effective in a building with all units designated for formerly homeless clients? What are the pros and cons?

VI. In Conclusion

53. What advice would you give a service provider and developer contemplating a new building with a mixed population like yours?

54. What other information or suggestions would you like to share with us regarding management of housing with a mixed population including formerly homeless tenants?

THANK YOU VERY, VERY MUCH!

**Shelter Partnership
BRIDGE Mixed Population Study
Social Service Provider Survey
November 2008**

I. General Information

Agency:

Project:

Project Address:

City:

Zip Code:

Primary Contact Name:

Primary Contact Title:

Primary Contact Email:

Primary Contact Phone:

Other Contact Name:

Other Contact Title:

Other Contact Email:

Other Contact Phone:

II. Description of Homeless Population

1. Were some of your formerly homeless tenants chronically homeless?

Yes ☐ No ☐

2. If yes, what proportion of your clients were chronically homeless? _____%

3. What types of disabilities do your formerly homeless clients have? Please estimate percentages (Percentages do not have to add up to 100%):

_____ % Physical Disability

_____ % Mental Illness

_____ % Substance Abuse

_____ % Co-Occurring Disorder

_____ % HIV/AIDS

_____ % Other:

4. Where were your formerly homeless clients living before they became tenants in your building? (Please estimate percentages.)

_____ % Homeless shelter

_____ % Transitional housing

_____ % Streets

_____ % Jail or prison

_____ % Hospital

_____ % Other institutional setting

_____ % Other:

5. Any changes in the client population since initial project occupancy? Any changes in the client population over the last year?

III. Services

6. Which of the following on-site and off-site services do you provide to your clients, whether provided by you or a partner agency?

	On-Site		Off-Site	
	Formerly Homeless	All Tenants	Formerly Homeless	All Tenants
Benefit advocacy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Case management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Child care	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Education/training	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employment/vocational services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Food and/or meals and/or nutritional counseling	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Housing information/housing placement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Legal assistance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Living skills (cleaning, cooking, dressing, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Medical care	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Medication assistance/management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mental health counseling/treatment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Money management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Representative payee	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Social or recreational activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Substance abuse counseling/treatment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Support groups/non-professional counseling	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Transportation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

7. If you indicated that you offer other on-site services not listed above, please list them:

[illegible]

8. Which of the on-site services listed above are most important in maintaining long-term stable tenancies? List top five services.

1.	
2.	
3.	
4.	
5.	

IV. Staffing

9. What agency acts as the lead service provider?

10. What partnering agencies provide on-site supportive services?

11. List all staff members of both the lead agency as well as partnering agencies providing on-site supportive services to the project's residents:

Number of FTE Positions	Title	Service Provider
<i>e.g. 1.0 FTE</i>	<i>Mental Health Clinician</i>	<i>Mental Health Partners</i>

12. Case manager to client ratio:

1 Case Manager to _____ Clients

13. Do you have separate case management for formerly homeless clients?

Yes ☐ No ☐

14. If yes, case manager to formerly homeless client ratio:

1 Case Manager to _____ % Formerly Homeless Clients

Comments about client ratios:

V. Other Services-Related Questions

15. In your experience, do homeless clients use services more or less frequently than other clients? Why do you think this is the case?

16. Are there any tenants not using your services who should be? If yes, why do you think this is the case?

17. How important are your on-site services to long-term successful tenancies? How do your services benefit the tenants and the functioning of the building?

18. How satisfied are you with the quantity and quality of on-site services being provided to your clients?

19. Are there differences in services provided formerly chronically homeless vs. other formerly homeless? After an adjustment period, are there differences in service need between formerly chronically homeless vs. other formerly homeless?

20. For your clients, please rank these challenges by frequency of occurrence (e.g. Enter “1” next to the challenge that occurs most often, a “2” next to the challenge that occurs second most often, and so on). For challenges that never occur, please enter “NA.”

Non-payment of rent	_____
Disturbing other tenants	_____
Drug/alcohol-influenced behavior	_____
Unauthorized guests	_____
Unable to live independently	_____
Illegal activity in unit	_____
Pet violations	_____
Clutter	_____
Other	_____

21. Do you require your formerly homeless tenants to use a representative payee as a condition of leasing?

22. If not, do you encourage your formerly homeless tenants to use a representative payee?

23. How many of your formerly homeless clients have a representative payee?

24. To what extent is rent payment a problem for your clients?

25. What changes have you made in service delivery since the project opened?

26. If funding were not an obstacle, what changes would you make in service delivery?

This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and extend across the width of the page. There are no margins, text, or other markings on the paper.

27. When tenants first moved in, did the non-homeless know that other tenants would be formerly homeless? What was the policy?

[illegible]

28. Are there or have there been issues between formerly homeless and non-homeless tenants?
If yes, what are or were the issues?

[illegible]

29. If you have services that are restricted to formerly homeless clients, have there been or are there any issues due to these restricted services? What are or were those issues?

30. Were there potential tenants who were not willing to rent because of homeless tenants? What reasons did they give?

31. Did anyone move out because of homeless tenants? What were their reasons?

32. Why do you think you have been successful (e.g. nature of homeless population, service provider, physical access, etc.)?

33. Are there community activities (formal or informal) which homeless and non-homeless populations participate in together?

34. Would service provision be more effective in a building with all units designated for formerly homeless? What are the pros and cons?

VI. In Conclusion

35. What advice would you give a service provider and developer contemplating a new building with a mixed population like yours?

36. What other information or suggestions would you like to share with us regarding services and management of housing with a mixed population including formerly homeless tenants?

THANK YOU VERY, VERY MUCH!

**Shelter Partnership
BRIDGE Mixed Population Study
Homeless Focus Group**

I. General Information

- 1) Where did you live before coming here, and what was life like for you there?
- 2) How has your life changed since coming here?

II. Activities and Services

- 3) In what activities and services do you participate?
- 4) What activities and services are not offered but you would like?
- 5) How important are activities and services?

III. Impressions of other Tenants

- 6) Are your neighbors in the building good neighbors? How have they behaved?
- 7) When you moved in, were you aware that some tenants would be formerly homeless, and some would not?
- 8) Have there been any issues between the groups of tenants? Are tenants tolerant of each other?
- 9) Have you experienced prejudice from other tenants? Negative experiences?

IV. Advice for Developers

- 10) Based on your experience living here, what things about the programs here or the facility would you recommend that staff include in new affordable apartment buildings?
- 11) What aspects of your experience here would you recommend be avoided in new affordable apartment buildings?

**Shelter Partnership
BRIDGE Mixed Population Study
General Focus Group**

I. General Information

1. Where did you live before coming here, and what was life like for you there?
2. How has your life changed since coming here?

II. Activities and Services

3. In what activities and services do you participate?
4. How do you decide whether to participate or not?
5. What activities and services are not offered but you would like?
6. How important are activities and services?

III. Impressions of other Tenants

7. Are your neighbors in the building good neighbors? How have they behaved?
8. When you moved in, were you aware of any targeted or special groups among applicants? (Follow up: What groups? or What different prior living experiences did tenants have before moving here?)
9. If you were aware, were you apprehensive? Concerned?
10. What were your concerns?
11. Do you still have concerns?
12. What has changed here since you moved in?
13. How satisfied are you with the building's policy of mixing tenants with different backgrounds in the same building?
14. How important is it to you that the building mixes tenants with different backgrounds in the same building?

IV. Advice for Developers

15. Based on your experience living here, what things about the programs here or the facility would you recommend that staff include in new affordable apartment buildings?
16. What aspects of your experience here would you recommend be avoided in new affordable apartment buildings?

**Shelter Partnership
BRIDGE Mixed Population Study
Developer Survey**

I. General Information

Developer:

Project:

Developer Title:

Developer Email:

Developer Phone:

Other Contact Name:

Other Contact Title:

Other Contact Email:

Other Contact Phone:

II. Subject Property Background

1. Why did you choose to mix populations in this building? _____

2. What were your hopes and expectations in the beginning, when the property was being built and opened? What actually happened? Think through some of what was surprising or rewarding. _____

3. Was the community's reaction to this project different from reactions you have had to 100% special needs projects? What experiences have you had of property's fitting into the community? How might community PR be handled differently in the future? How might a community understand such buildings as a residences rather than as a facilities or institutions?) _____

III. Services-Related Questions

4. What changes have been made in on-site social service delivery since the project opened?
Have there been funding issues? _____

IV. In Conclusion

5. Would you mix populations in another building? _____

6. If so, what would you do differently? _____

7. What other lessons have you learned that will be helpful in opening successful mixed population residences elsewhere? What advice would you give a service provider and developer contemplating a new building with a mixed population like yours? _____

8. What other information or suggestions would you like to share with us regarding management of housing with a mixed population including formerly homeless tenants?

THANK YOU VERY, VERY MUCH!

Shelter Partnership, Inc BRIDGE Mixed Population Study
Property Abstract

Please complete and return by Thursday, November 13 to:
srenahan@shelterpartnership.org or fax to 213-689-3188.
If this information is contained in other documents and you would prefer to send those rather than complete this form, we welcome that response. Thank you!

Info Provided By:					
Phone:					
Email:					
Project Name:					
Owner:					
Co-Developer:					
Lead Service Provider:					
Occupancy Date:					
Unit Type:	SRO	Studio	1-Bedroom	2-Bedroom	3-Bedroom or Larger
Total Units:					
Manager's Units:					
Homeless Units:					
Units Targeted to Other Populations:					
Units Reserved at 60% AMI					
Units Reserved at 50% AMI					
Units Reserved at 40% AMI					
Units Reserved at 30% AMI					
Other Restriction:					
Unit sizes (sq ft):					
Building size (sq ft):					
Floors:					
Site Characteristics:					
Neighborhood Characteristics:					
Parking Spaces:					

	Square Feet	Description
Exterior Common Space:		
Interior Common Space:		
Services Space:		
Amenities:		
Total Development Cost:		
Permanent Funding:	Sources:	Amounts:
Operating Subsidy:		

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