

## MetLife Foundation



## 2008 AWARDS FOR EXCELLENCE IN AFFORDABLE HOUSING

Supportive Housing and Property and Asset Management

in partnership with





MetLife Foundation  
Award For Excellence  
In Affordable Housing

# AWARD WINNERS IN SUPPORTIVE HOUSING AND PROPERTY AND ASSET MANAGEMENT

Round Thirteen  
2008

**MetLife Foundation**

in partnership with



## About MetLife Foundation

MetLife Foundation was established in 1976 by MetLife to carry on its long-standing tradition of corporate contributions and community involvement. Grants support education, health, civic and cultural programs. MetLife and MetLife Foundation have supported Enterprise's neighborhood revitalization activities with grants and loans of almost \$39 million. For more information, visit [www.metlife.org](http://www.metlife.org).

## About Enterprise

Enterprise is a leading provider of the development capital and expertise it takes to create decent, affordable homes and rebuild communities. For more than 25 years, Enterprise has pioneered neighborhood solutions through public-private partnerships with financial institutions, governments, community organizations and others that share our vision. Enterprise has raised and invested \$9 billion in equity, grants and loans to help build or preserve 225,000 affordable homes to create vital communities. Enterprise is investing in communities at a rate of \$1 billion a year. Visit [www.enterprisecommunity.org](http://www.enterprisecommunity.org) and [www.enterprisecommunity.com](http://www.enterprisecommunity.com) to learn more about our efforts to build communities and opportunity, and to meet some of the half a million people we have helped. For resources to help community development professionals, go to [www.enterprisecommunity.org/resources](http://www.enterprisecommunity.org/resources).

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# FOREWORD

MetLife Foundation and Enterprise share a commitment to building healthy communities with access and opportunity for all. We also recognize that decent, well-managed affordable housing is a vital element of healthy communities.

We launched the Awards for Excellence in Affordable Housing in 1996 to increase the quantity and quality of affordable housing nationwide. In the program's 13 years, we have recognized more than 80 nonprofits for innovation and effectiveness in supportive housing and property and asset management. Award winners have received nearly \$1.4 million in unrestricted support to expand their work, and Enterprise has shared best practices and lessons learned with the field.

This publication contains case studies of the 2008 award-winning projects. We are sharing these case studies to provide real-life examples and inspiration for organizations facing similar challenges and opportunities.

Sibyl Jacobson  
President  
MetLife Foundation

# ACKNOWLEDGMENTS

First and foremost, we thank MetLife Foundation for its long-term commitment to creating sustainable affordable housing for Americans with low incomes. We also extend our thanks to the executive directors and other staff of all of the nonprofit organizations that participated in the competition this year. Although we were only able to provide six awards to exemplary best practice housing projects, there were many excellent properties in the submissions. We deeply appreciate and commend the work of all the applicants, both in this process and in the missions and work of their organizations.

Additionally, we thank the Enterprise staff and consultants who helped throughout this process. It is an in-depth and complex process designed to solicit quality applications and ensure that the very best housing is given the recognition it deserves. These team members designed and managed the program, conducted site visits, reviewed applications, selected finalists and choreographed the awards ceremony.

Patricia Magnuson managed the overall process and worked with consultants on the application, the review and selection processes. Andrea Besok coordinated the application process, the awards management process, and helped the winners manage the logistics of travel and registration. Kathleen Rzemien coordinated the online communications. Catherine Hyde led the publications team, TeAnne Chennault headed the publicity effort, and Donna Schmidt produced the slide show.

# ABOUT THE AWARDS PROGRAM

## Recognizing Excellence and Sharing Best Practices In Affordable Housing

MetLife Foundation Awards for Excellence in Affordable Housing were developed in 1996 by MetLife Foundation and Enterprise to recognize the outstanding work of nonprofit organizations in developing and effectively managing housing for individuals and families with low incomes. Competition is in two categories: supportive housing and property and asset management. In addition to public recognition, winners receive an award of unrestricted funds to expand their work.

1st place: \$40,000

2nd place: \$30,000

3rd place: \$20,000

Specifically, the goals of the awards are to:

- Showcase models of excellence in the management of affordable housing and the operation of supportive housing for populations with special needs.
- Increase the understanding of how to achieve success in providing supportive housing for populations with special needs.
- Increase the understanding of the role of the owner, asset manager, property manager and tenants in developing, maintaining and operating affordable housing.
- Provide unrestricted financial support for agencies that exhibit excellence in asset or property management and the provision of supportive housing.
- Disseminate information on model supportive housing and property management programs through the Enterprise website, [www.enterprisecommunity.org/resources](http://www.enterprisecommunity.org/resources).

For additional information about MetLife Foundation Awards for Excellence in Affordable Housing program, including the online application process, criteria, deadlines and copies of this and past winners' books, see the Enterprise website, [www.metlifeawards.enterprisecommunity.org](http://www.metlifeawards.enterprisecommunity.org). This book can be downloaded free in PDF format.

To order a free print version, email [metlifeawards@enterprisecommunity.org](mailto:metlifeawards@enterprisecommunity.org). Additional tools and resources to help nonprofits rebuild low-income communities are available at [www.enterprisecommunity.org/resources](http://www.enterprisecommunity.org/resources).

## CRAIG GARDENS SENIOR HOUSING

First Community Housing, San Jose, Calif.

Craig Gardens Senior Housing, a single-site property with 90 units developed, owned and operated by First Community Housing (FCH) uses several exemplary practices in the areas of property and asset management. The organization engaged management in the design process for this new construction property, which first opened its doors to seniors in the Bay Area in August 2002, as a certified Green Building focusing on indoor air quality standards for seniors.

FCH also developed an eco-friendly operation and maintenance manual as well as an eco-friendly resident manual. The organization also ensures that staff and residents are trained on the appropriate use of materials and equipment.

FCH takes a portfolio approach to asset management and compares performance of properties across its portfolio as well as to comparable properties in the region. This is a practice that monitors property performance and identifies property strengths and weaknesses, allowing the asset manager to work with the property managers and focus on improving performance. Craig Gardens is a wonderful example of excellent communication and collaboration among the property manager, asset manager, owner, resident services staff and residents.

### The Organization

FCH, a California 501(c)(3) Nonprofit Public Benefit Corporation, builds high quality, eco-friendly, 100-percent affordable housing developments and offers resident services that meet the needs of those who earn less than the area median income. FCH serves families and individuals with low incomes and populations with special needs, such as those with chronic illnesses or developmental disabilities.

Since 1986, FCH has created housing for more than 2,700 low-income residents in 13 affordable housing developments throughout the San Francisco Bay region. At the time of this writing, FCH possessed more than 1,000 affordable residences with another 610 in various stages of planning and pre-development and a 60-unit single-room occupancy building under construction.



The courtyard provides areas for outdoor gardening, a central plaza with a small fountain, and a trellis and lawn area for groups. First Community Housing used water-saving plants when landscaping and uses only non-toxic sprays to maintain the landscape.

**PROJECT TYPE**

New construction, rental, single site, one three-story, 90-unit building

**RESIDENT PROFILE**

All residents are seniors; 66 of the 89 units house single adults; there is one unit for the onsite manager; all units are 60 percent or less of AML; 48 percent Hispanic, 18 percent Asian/Pacific Islander; 13 percent African or African American, 13 percent Caucasian; 8 percent "other"

**RENT STRUCTURE (MONTHLY)**

One bedroom: \$565-845

**OCCUPANCY RATE**

FY 2006: 98.8 percent

FY 2005: 99 percent

**KEY FEATURES**

A portfolio approach to asset management; eco-friendly property and practices; a "green" operation and maintenance manual as well as one for residents; LEED certified

**KEY SERVICES**

Referral program for residents with special needs; EcoPass, a free annual transportation pass; exercise classes and regular social activities; resident newsletter

**PROJECT COST**

Total project development cost: \$13,003,518

Per unit: \$144,483

**CONTACT INFORMATION**

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The organization has a staff of 10, and an annual operating budget of just under \$1.8 million.

**The Project**

First Community Housing serves as the developer, owner and asset manager of Craig Gardens, a property that provides seniors with 90 affordable one-bedroom apartments within one three-story building. Each apartment, the majority of which are occupied by singles (currently 66 of 89 residential units), averages 530 square feet. The property is open to households (seniors only) earning from 30 to 50 percent of the area median income. Craig Gardens is conveniently located near shopping in suburban San Jose. All suites and common areas are designed to meet the special needs of seniors.

FCH acquired the 1.47-acre site in November 1999 and developed Craig Gardens as new construction, opening its doors in August 2002. The entire property development costs came to just over \$13 million, breaking down to \$144,483 per unit. The financing for Craig Gardens included: 36.9 percent in bond financing; 36.3 percent in funding from the San Jose Housing Trust Fund; 25.1 percent in LIHTC equity and 1.7 percent from deferred developer fee.

FCH uses the latest energy-saving, sustainable, green-building design and elements in all of its buildings, including Craig Gardens. The property has a number of sustainability features, including all gas, Energy Star appliances and low-flow water fixtures; linoleum and recycled-content carpets and metal siding; and energy-efficient windows. Public transportation is available adjacent to the site, and all residents are provided with an Eco Pass, a free annual transportation pass, helping to ensure that residents can get where they need to go without having access to a personal vehicle.

Since its opening in 2002, Craig Gardens has received numerous awards and recognition for its design from such entities as the National Association of Home Builders, the National Council on Seniors Housing, and *Builder* magazine.

## Property Management Summary

The third-party property manager for Craig Gardens, which handles the day-to-day operations, is the John Stewart Company, (JSCo). The FCH board of directors sets the overall goals for the organization, and the asset manager translates those goals into specific objectives for JSCo. FCH keeps excellent property management records for Craig Gardens and is in close and frequent contact with JSCo.

The property consistently operates at better than 98-percent occupancy and rent collections. There is an overwhelming demand for housing in Craig Gardens and turnover time to reoccupy a vacant unit is less than one day. The turnaround time is ensured through a proactive system for filling vacancies that includes a well-maintained wait list. Specifically, JSCo notifies FCH two weeks before their wait list opens and then the two organizations work together to promote knowledge of openings and wait-list opportunities.

JSCo submits a monthly report to FCH detailing occupancy rates, move outs, budget variances, evictions, actions taken with residents, repairs over \$2,500, contracts, wait lists and third-party communications. JSCo handles routine work orders within one to two days and schedules preventive maintenance monthly.

FCH tracks the performance of the major systems, actual vs. projected energy consumption and equipment repairs and breakdowns. The organization also performs an annual site survey and adjusts its reserves as appropriate.

FCH developed a clear policy and procedures manual for Craig Gardens that is maintained on site and helps JSCo manage the property. Most notably, FCH provides its *Green Operations and Maintenance Manual* to each of its property management companies, as well as its *Green Resident Housekeeping Manual* (bilingual, English and Spanish). The operations and maintenance manual helps to ensure the correct maintenance, operation and replacement of each property's specified green products and systems. The resident manual addresses the green products and finishes in the apartments, explains how to properly care for them and provides resources and tips on recycling and keeping the overall community in good condition. New residents attend orientation sessions that explain the green features of their home.



Each of the 90 apartments was designed with the specific needs of senior residents in mind. At the apex of this three-floor, 90-unit building there are community rooms where residents gather and socialize.

FCH also has created a database of green options for multifamily affordable developments. Called GREENBase, it defines green development compared to standard development, the health and cost impact of green choices and some modeling capability for analyzing reserve accounts. This program was developed as shareware, and FCH makes it available to other affordable housing developers.

### Asset Management Summary

JSCo manages more than 18,000 units of housing in Northern California and is experienced with the requirements of all federal and state housing program guidelines. FCH has worked with JSCo since 2002, and the organization's expertise in this area has proven to be a great benefit.

The asset management procedures that FCH has put into place ensure that the asset manager is able to quickly determine if action needs to be taken in any particular area of property management. The asset manager at FCH is in daily contact with JSCo to review issues related to Craig Gardens. JSCo provides monthly financial reports, including bank statements, vacancy reports, etc., which allow FCH to track Craig Gardens' performance. Each quarter, the FCH asset manager compares this data against data from 12 other FCH properties for individual expense line items. FCH uses any variations found in both the property's budget and in comparison to other buildings as a basis for further investigation.

In July of every year, JSCo proposes the next year's budget. The asset manager puts the budget on a spreadsheet and compares the budget with other FCH properties. Variances lead to questions that must be answered before the budget is sent to the FCH finance committee for review. After final approval from the FCH board of directors, the budget is sent to the investor and lenders concurrently. After taking comments, the asset manager sends a final budget to JSCo for inclusion in next year's financial reports.

A project status report is updated after every move in and move out to ensure compliance with all tax credit and other regulations. Along with three reviews of all JSCo files, the FCH auditor takes a 10-percent sample of all files every year.



Craig Gardens Senior Housing was designed to promote energy efficiency as well as sustainability and a healthy living environment for seniors. The property is well designed and eco-friendly (LEED certified).

Additionally, within a year after the property was developed a capital needs assessment was completed and a preventive maintenance schedule was developed. The capital needs assessment is updated every five years.

## Physical Features

Craig Gardens was designed to promote energy efficiency as well as sustainability and a healthy living environment for seniors. The property is well designed and eco-friendly (LEED certified), ensuring that it is both a draw for prospective tenants and blends well with market-rate housing in the area. Each of the 90 units was designed with the special needs of seniors in mind. Each 530-square-foot air-conditioned apartment contains a full kitchen, a bathroom with a tub and shower, a bedroom with a walk-in closet and a generous living-dining room with a private deck.

The courtyard provides areas for outdoor gardening, a central plaza with a small fountain, and a trellis and lawn area for groups. FCH used water-saving plants in landscaping and uses only non-toxic sprays to maintain the landscape. Craig Gardens is located across the street from a major bus stop and a shopping center. By building along the edges of this triangular site, a large quiet community space was created for residents. The apex of the triangular site contains interior community rooms.

## Resident Involvement

FCH and JSCo together strive to involve residents in both the immediate and local communities. To ensure that residents receive the services that they need, resident services staff conduct needs assessment surveys to guide the development of programs. A free on-site exercise program designed for seniors helps residents remain fit and healthy.

The Valley Transportation Authority created an Eco Pass program that provides unlimited rides on county buses and light rail. FCH provides this pass free to all residents, saving them the \$800 pass fee, and encouraging them to travel into San Jose by providing a safe, alternate form of transportation.

Craig Gardens is a safe property for its residents, with a secure entry system to the building. The resident-services staff also organizes a Neighborhood Night Out in cooperation with the local police department to encourage a positive relationship with public safety officials and to increase neighborhood security and safety.

Most importantly, the Craig Gardens Senior Housing residents are satisfied with the property. They like where they live, as evidenced by the consistently excellent occupancy and rent collection rates.

## Community Impact and Neighborhood Relations

Public relations with the local community began before Craig Gardens was built. FCH attended several meetings with both the city council and the local community and invited public input into various

aspects of the building throughout the development process. FCH used various avenues for keeping the public informed about development and leasing plans to ensure that the property would be accepted as part of the neighborhood.

Staff work with the fire department and police department to maintain a safe environment, and created a directory of area social service agencies. FCH also provided extensive street and utility improvements far beyond the scope of the property itself. This 300-foot off-site extension of improvements included new streets, curbs, gutters, underground water service, sewer and sanitary sewer. Street lighting for the adjacent residences was also improved.

The on-site clubhouse is often used as a meeting place for neighborhood events, helping to ensure the integration of the Craig Gardens Senior Housing residents with the surrounding community.

## Summary

With the Craig Gardens Senior Housing development, First Community Housing of San Jose provides an example of property and asset management for affordable housing at its best. The building and the surrounding property were developed with the needs and desires of seniors in mind. FCH ensures that residents have both easy and free access to public transit, ensuring that they are never isolated from the community at large. Built “green,” care is taken to maintain the green nature of the building through proper maintenance, and correct processes are filmed to be used for staff training. As a rule, FCH views all of its properties as part of a portfolio as opposed to stand-alone projects. Management was involved in the design process to bring experience and build in long-term sustainability from the start. In addition, FCH maintains frequent, regular contact with the John Stewart Company, the property management firm that handles Craig Gardens. And the owners and managers have created a *Green Operations and Maintenance Manual* as well as a *Green Resident Housekeeping Manual*, both of which provide best-in-field examples. Currently, FCH is working to set up wireless Internet access and computer support for the Craig Gardens tenants.

## HOUSE TOWN HOUSE ACQUISITION AND RENTAL PROGRAM

Reston Interfaith Housing Corporation, Reston, Va.

The HOUSE Town House Acquisition and Rental Program, an initiative of the Reston Interfaith Housing Corporation, encompasses 29 scattered-site rental units located throughout Reston and Herndon, Va., two neighboring suburbs about a 40-minute drive from Washington, D.C.

The HOUSE Program (Housing Opportunities Strengthen Everyone) addresses the issues of homelessness and families at-risk of becoming homeless through a Housing First model of rapid re-housing through the use of tenant-based and project-based vouchers, followed by critical, targeted services to assure sustainability.



All of the affordable rental homes available through the HOUSE Program blend in with surrounding market-rate homes.

In addition to being the developer and owner of the HOUSE Program properties, Reston Interfaith runs the properties, serving as property and asset manager and resident services coordinator and provider. Reston Interfaith Housing Corporation reports to the CEO and board of directors of Reston Interfaith, Inc. thus facilitating communication and reporting of all areas of property and asset management for the program.

The key to their success with the HOUSE Program is the constant attention paid to all aspects of the property. The corporation maintains strong internal communications among property management and upper management, with resident-services staff, with the local homeowners' associations and with their funders.

### The Organization

In 1970, six religious communities in Reston founded Reston Interfaith, Inc. as a separate nonprofit 501(c)(3) organization focused on developing affordable housing. Since then, Reston Interfaith, Inc.'s mission has grown to include the promotion of self-sufficiency by supporting and advocating on behalf of those in need of food, shelter, affordable housing, affordable child care and other community services. As a private, nonprofit community-based organization, Reston Interfaith, Inc. served more than 13,000 Northern Virginians in 2007 with a range of emergency and supportive services. The agency dedicates more than 88 percent of its annual budget to direct client service and support.

**PROJECT TYPE**

Moderate rehab of 29 transitional scattered-site, single-family detached rental units: two one-level condos; 24 two-level townhouses; three three-level townhouses; The majority (22) are three-bedroom; seven are two-bedroom

**RESIDENT PROFILE**

Majority (65 percent) are single-parent households; 27 percent are formerly homeless; 6 percent are seniors; 25 of the 29 units are rented to households earning 31-50 percent of AMI; 66 percent of residents are African American; 24 percent are Caucasian; 10 percent are Hispanic

**RENT STRUCTURE (MONTHLY)**

Two bedroom: \$1058-1113  
Three bedroom: \$1150-1230

**OCCUPANCY RATE**

FY 2006: 95 percent  
FY 2005: 96 percent

**KEY FEATURES**

Housing First homeless housing model for families; properties promote independent living through scattered-site locations; local homeowners' associations have common spaces available to residents; housing blends in with the surrounding market-rate homes; residents have access to village centers and public transportation

**KEY SERVICES**

Case management; personal finance/budgeting; parenting, early child development and youth engagement; educational and employment supports; domestic violence support

**PROJECT COST**

Total project development cost:  
\$3,659,730 (for all properties)  
Per unit: Varies by property

**CONTACT INFORMATION**

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Reston Interfaith Housing Corporation is a wholly owned subsidiary of Reston Interfaith, Inc. It serves very low- to moderate-income individuals and families through a 70-bed shelter; two transitional housing programs totaling 28 units; 37 townhomes and 48 apartments. The organization, which has 88 employees, had an annual operating budget of \$420,000 for FY 2008.

**The Project**

As a certified housing development and management company, Reston Interfaith Housing Corporation purchases townhomes, develops scopes of work and renovation plans, contracts for renovation work, rents and manages all units and provides an array of self-sufficiency oriented social services to residents. The program serves households with a combined income at or below 50 percent of AMI.

Reston Interfaith Housing acquired the 29 scattered-site two- and three-bedroom townhomes and condos under the program over 13 years—from April 1990 to March 2003. At the time of purchase, all of the properties required moderate rehab and some required reconfiguration. The development timelines and costs varied by unit. However, the total property development costs came to \$3,659,730. The total annual operating costs for the project are \$188,500.

The funding sources for the development of the properties break down to 50 percent from Reston Interfaith Housing funds, 25 percent from the HUD HOME Program, and 25 percent from the HUD Community Development Block Grant Program.

Today, each of the seven two-bedroom units in the community provides residents with 1,163 square feet. The 22 three-bedroom units provide 1,267 square feet.

**Property Management Summary**

Reston Interfaith Housing Corporation acts as the property and asset manager for the HOUSE program. The corporation pays attention to performance, budgets for capital needs, and does an extraordinary job working with a scattered-site, special-needs

population. This is reflected in the cash flow of property operations, which held steady at \$76,464 for FY 2005 and 2006.

The HOUSE Program properties maintain a steady 95-96 percent occupancy rate with a relatively low turnover of four to five units per year. It takes the corporation 15 days to re-occupy a vacant unit.

Once a unit is occupied, Reston Interfaith Housing Corporation conducts four annual inspections of each property and takes care of any needed maintenance. Residents are also encouraged to call-in any repair or maintenance issues, which are taken care of within 24 hours. The units are also inspected by several third parties, and Reston Interfaith Housing Corporation has been given a best practices award from the Fairfax County Department of Housing and Community Services for its work.

For the 29 townhomes in the program, \$75,168 is set aside annually for capital needs, and \$216 is set aside per unit each month for reserve or replacement including funds needed for unit turnovers.

The Reston Interfaith Housing Corporation's annual budgets are prepared in consultation with the CEO, the financial department and the housing corporation staff. The housing corporation receives incoming funds and vendor invoices and, after recording for management purposes, submits funds and invoices to the financial department for deposit or payment. The CEO, housing and accounting staffs meet periodically, or as needed, to review Reston Interfaith Housing Corporation statements, noting and discussing any variances in budgets.

### Asset Management Summary

From an acquisition and asset management perspective, the goal of the HOUSE Program is to purchase, renovate, lease and manage as many townhomes as possible for at-risk, low-income households. Reston Interfaith Housing Corporation has established several overarching goals and performance measures that are somewhat different from traditional asset management measures. However, this has led the organization to develop both organizational and program stability, allowing it to grow as appropriate and to develop and manage good, quality housing that is accepted and wanted by the community.

### Physical Features

The exterior of all scattered-site units in Reston and Herndon are governed by cluster association guidelines, to which the units in the HOUSE Program adhere. Curb appeal is important to each of the properties. Landscaping is kept up to enhance the overall appearance of each unit, and housing within the program blends in well with the surrounding market-rate



This Housing First initiative from Reston Interfaith Housing Corporation, encompasses 29 scattered-site rental units located throughout two neighboring Northern Virginia suburbs.

housing. Residents have access to village centers and public transportation and, through local homeowners' associations, they can access common spaces.

When renovating units, Reston Interfaith Housing Corporation purchases Energy Star appliances, installs vinyl siding and encourages residents to use energy-efficient lighting.

## Resident Involvement

Reston Interfaith Housing Corporation is a Community Housing Development Organization (CHDO). Its board of directors includes three low-income HOUSE Program residents who provide regular input into the design and operation of the program. The Housing Corporation also contacts residents through surveys and meetings to gather input regarding program design and operations. It also encourages residents to join their individual neighborhood associations since the HOUSE Program is a scattered-site project.

Resident satisfaction is measured through management and social-service contacts—residents meet regularly with their case managers and all factors indicate that they are pleased with their homes and their communities.

The housing units are considered transitional housing and a social worker case manages each family. The overall goal is self-sufficiency. Each family and the social worker agree on a service contract with multiple services and responsibilities toward that end. Interfaith provides counseling and case management and links to services such as rental assistance, job training, tuition support and family and life skills. The resident-services staff is in constant communication with the residents and offers support to their daily lives.

## Community Impact and Neighborhood Relations

For almost 40 years now, Reston Interfaith, Inc. has served the Reston/Herndon communities. The organization is well connected to other agencies, the local Fairfax County government, and the area business community. Reston Interfaith, Inc. and the Reston Interfaith Housing Corporation board and staff members serve on a variety of community boards and executive committees and are active in area outreach efforts. For example, the vice president of housing and community development serves on the Reston Association Board of Directors as the representative for Reston apartment owners.

Reston Interfaith Housing Corporation and the HOUSE Program also have benefitted greatly from groups of volunteers that regularly serve the program in both maintenance and supervised social service assistance capacities. One maintenance and renovation group spends one weekend a month for 10 months out of the year performing maintenance and renovation work on townhomes within the program. Another volunteer group has developed an innovative program called Graceful Spaces, through which volunteers help new residents acclimate to the community by assisting with such tasks as mail, trash, cleaning, laundry, space planning and decorating.

## Summary

Reston Interfaith Housing Corporation has successfully moved families through the housing continuum by establishing an effective communication network among management, service staff and the Reston community. Their constant attention to family and property needs has created excellent housing opportunities for formerly homeless families. Staff effectively orients families into their apartments using a tenant welcome packet as well as a lot of TLC.



The HOUSE Town House Acquisition and Rental Program Housing First focus develops and maintains high-quality townhomes throughout Reston.

It is so highly regarded that neighborhood groups identify opportunities for growth to Reston staff. The success of the program is testament to the organization's understanding of and willingness to bear the cost of good property management. They have a small staff that pays constant attention to the properties and the residents and stays in constant communication with resident-services staff. Scattered-site housing is the hardest affordable housing to manage, and the physical condition and financial performance of the Reston Interfaith Housing Corporation properties, coupled with the success of their residents, truly accomplish the double-bottom-line objectives of mission-driven affordable housing.

Despite being a scattered-site affordable housing program, residents remain in close contact with both resident services and an assigned social worker for support.

# WHEELER HOUSE SENIOR RESIDENCE

New Birth Community Care Center, Chicago

New Birth Community Care Center (NBCCC) is the nonprofit property manager and resident services provider for the 89-unit Wheeler House Senior Residence in Chicago. Their joint venture for-profit partner, S.W. Development, was the co-developer and is the asset manager for the property, which opened in January of 2003. NBCCC and S.W. Development are co-owners of the property and will remain so for the initial 15-year Low Income Housing Tax Credit (LIHTC) compliance period.

The motto behind everything that happens at Wheeler House is “principled and profitable.” NBCCC approached building a senior property with a commitment to principles, partnered with S.W. Development’s focus on profitability and a well-run building. The two organizations determined that both profits and principles must remain in balance for the partnership and Wheeler House to be successful.



Wheeler House was specifically designed to create a community for its senior residents with 89 one-bedroom and efficiency apartments nestled around a four-story, all-season atrium.

## The Organizations

NBCCC seeks to motivate and engage in the development and revitalization of Chicago’s Englewood community through projects designed to recover a sense of common dignity and morality and to establish a firm foundation of community awareness and respect. In the 1980s, Jonnie Wheeler, who was pastor of the New Birth Church of God in Christ, envisioned his parish providing safe housing for seniors in their community, an area that had been overrun by gangs and drug dealers. The New Birth congregation worked together to raise funds, buying small parcels of land for \$250-\$450 a lot. It took almost 20 years for the congregation to acquire 80 percent of a city block in Englewood.

Within those 20 years, Pastor Wheeler and many of the original congregation members who were instrumental in raising the funds had passed away. However, the new pastor, Willard Payton—Pastor Wheeler’s son—picked up where his father had left off. New Birth approached S.W. Development, a management company that Payton knew from previous experiences treated seniors with respect and dignity.

At first, S.W. Development, a well-regarded local for-profit housing company without experience in developing and operating LIHTC properties, was not interested in working with NBCCC. After

many long hours of discussions, NBCCC and S.W. Development agreed to create a partnership to build a senior development in Chicago's West Englewood neighborhood. NBCCC was incorporated in 1998 as a separate 501(c)(3) for the express purpose of creating affordable housing. A major part of the management agreement between NBCCC and S.W. revolves around NBCCC receiving training in operational issues. Part of the agreement requires NBCCC to share what they have learned with inexperienced nonprofits looking to develop affordable housing.

NBCCC's annual operating budget for FY 2008 was \$59,121. The organization's only completed property to date is Wheeler House, with a total of 89 units.

## The Project

Wheeler House was specifically designed to create a community for housing seniors, rather than a building for seniors. The property has a total of 89 one-bedroom and efficiency apartments surrounding a four-story, all-season atrium. Together, NBCCC and S.W. Development built Wheeler House and opened the new property to seniors on January 16, 2003.

NBCCC and S.W. Development are co-owners of Wheeler House for the initial 15-year tax credit period. Thereafter, S.W. Development will step aside and turn 100 percent of the ownership over to NBCCC. The building has a forty-year affordable extended use agreement.

The majority of the funding for Wheeler House came from LIHTC Equity (41.5 percent) and City HOME Funds (36.9 percent). The remaining funding consisted of state trust funds, the Affordable Housing Program of the Federal Home Loan Bank System, a ComEd/Chicago Energy Grant and mortgage financing.

## Property Management Summary

Wheeler House has performed consistently well, maintaining occupancy above 97 percent and, thanks to the electronic withdrawal of rent from residents' accounts, rent collection at 100 percent. Work

### PROJECT TYPE

New construction, single site; one four-story building with 89 rental apartments (majority one-bedroom, with 12 efficiencies)

### RESIDENT PROFILE

Seniors, 98 percent African American; household income of 50 percent or less of the AMI

### RENT STRUCTURE (MONTHLY)

Efficiency: \$275-540  
One bedroom: \$275-675

### OCCUPANCY RATE

FY 2006: 97.3 percent  
FY 2005: 97.8 percent

### KEY FEATURES

A joint venture between a nonprofit and for-profit; design ideal for senior housing; the energy-efficient atrium is a gathering spot for residents; community space includes an exercise room, computer room, community kitchen and meeting room

### KEY SERVICES

Residents have access to multiple education programs, including computer literacy, financial and health workshops, a book club and recreational, social and exercise programs; close relationship with local police precinct

### PROJECT COST

Total project development cost: \$10,398,797  
Per unit: \$116,840

### CONTACT INFORMATION

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orders are taken care of within 24 hours. The unique design of Wheeler House with the focus on the atrium results in significantly lower than market-average heating costs.

Maintenance maintains a manual that contains checklists and maintenance schedules for major building components, inspections and tests. Management reviews the manual and work orders on a monthly basis. Building unit assessment sheets are kept by unit to keep track of repairs, replacements, and warranties on equipment, as well as resident wear and tear. The building manager also maintains an operations manual that contains all current and historic rent and income limits, agency inspection reports, master vendor contact lists and a laundry list of other timely information. Organized by year of operation, the manual makes locating information simple.

S.W. Development and building staff also complete a weekly walk through of Wheeler House. Five-year maintenance reviews are conducted by outside vendors on all major building components. Evening security staff walk the building several times a shift and are responsible for reporting any maintenance or housekeeping issues to the building manager. There is also an annual building review that is conducted to assess useful age on major building components. The review is updated annually.

Quarterly resident council meetings are held and a representative for NBCCC or S.W. Development is at every council meeting to allow management direct access to resident concerns and suggestions. The ability of residents to communicate directly to management has enabled management to move quickly on concerns and encouraged residents to become vested in the care and maintenance of the building.

## Asset Management Summary

In this joint venture property, Pastor Willard Payton serves as the president and CEO of NBCCC. Pastor Payton meets with S.W. for management updates on a monthly basis. He oversees NBCCC's coordination of the financial, operational and social service components of the building. S.W. Development oversees performance and is training NBCCC staff in the management of its operations.



The energy-efficient atrium is designed to let in warmth in the winter and keep out heat in the summer.

There is a 15-year pro-forma in place that indicates that cash flow will wane in the latter years. At the five-year mark, Wheeler House has managed to amass three-quarters of a million dollars in reserves and cash-on-hand to address future capital needs. Twenty-five percent of all yearly net cash flow remains in the partnership. All financial assets are carefully invested to allow for the maximum interest possible in a guaranteed environment. Special arrangements are made with financial institutions so that, should NBCCC need to access its resources, no penalties for early withdrawal will be charged.

## Physical Features

The energy-efficient atrium, which is designed to let in warmth in the winter and keep out heat in the summer, is central to the lifestyle of the residents. Instead of apartments on both sides of a corridor, the atrium opens the building to natural light and landscaping. Residents walk through the atrium to get to the elevators, promoting socialization. The ground floor of the atrium is designed as an all-weather gathering place. The fitness center, computer lab, community room and management office are all located on this level.



Residents have access to numerous education programs, including computer literacy, finance and health workshops, a book club and recreational, social and exercise programs.

In order to save energy, the hall lighting in Wheeler House is on a timer system and low-flow toilets have been installed. Both the one-bedroom and the efficiency units are well designed. In fact, due to the effective layout of the efficiencies, they look like three-room apartments. The neighborhood surrounding Wheeler House is in transition, and this property provides a positive influence on the surrounding community. The building overall has excellent curb appeal and brightens the neighborhood. Extra safety precautions are also taken throughout the building.

## Resident Involvement

The philosophy guiding Wheeler House is the old medical school methodology of “watch one, do one, teach one.” When Wheeler House opened, many of the seniors had never had a checking account and worked hard to understand how to manage their funds. These same residents have gone on to help their peers benefit from their experience. Several of the residents had never before had a place of their own, and they too have gone on to help others who are making the same transition.

The resident council at Wheeler House plans activities. In addition, residents have access to multiple education programs, including computer literacy, financial and health workshops, a book club and recreational, social and exercise programs.

As previously mentioned, management holds quarterly meetings with all residents to address issues and concerns, and ensure that residents’ needs are met. All staff track and report incidents and there is a regular police presence on site. The residents have good relationships with the police in the neighborhood.

## Community Impact and Neighborhood Relations

NBCCC serves the community as a catalyst and magnet for bringing neighborhood groups together. Having Wheeler House as a meeting place for the neighborhood at-large has galvanized the community to organize around a number of issues including school attendance, making fathers more present

in children's lives, and street violence. Several neighborhood residents sit on the NBCCC board. The local alderwoman even holds her annual community meeting at Wheeler House.

The Wheeler House staff and residents and NBCCC work actively with the Chicago Police Department, the Chicago Fire Department and various city agencies to maintain a safe and secure environment. Neighborhood CAPS meetings, which bring neighbors and police officers together to strategize best policing practices, are held monthly at Wheeler House.

### Summary

New Birth Community Care Center represents a unique philosophy toward housing management that stems from its partnership with the for-profit S.W. Development company and agreement with the philosophy of "principled and profitable." Wheeler House is well managed, and both NBCCC and S.W. Development work effectively to meet their double-bottom-line goals of financial and social success.

S.W. Development is also training NBCCC to eventually take over various responsibilities. The property operates on a "watch one, do one, teach one" methodology. This method has been effective in the development of good principles and practices of property and asset management and has resulted in a wonderful home for the residents of Wheeler House.

## RENAISSANCE AT CIVIC CENTER APARTMENTS

Colorado Coalition for the Homeless, Denver

Renaissance at Civic Center Apartments (CCA), owned and managed by the Colorado Coalition for the Homeless (CCH), is located in the heart of downtown Denver and provides permanent supportive rental housing to chronically homeless individuals within an affordable housing development. CCA is located on the east end of Denver's 16<sup>th</sup> Street pedestrian mall. The six-floor building that constitutes the Civic Center development is on the Colorado register of historic places, having once housed the YMCA where basketball was invented. Today, the Civic Center property provides 216 apartments in the form of single-room occupancy units (SROs), efficiencies and one-bedroom units. It includes community rooms and the new Central Denver YMCA. At least 50 percent of the Renaissance residents are in CCH programs with intensive case management. The other half are eligible for affordable housing due to disabilities or low income. A range of resources is available to all residents.



The building that now houses both the Civic Center Apartments and the new Denver Central YMCA has retained its exterior appearance while undergoing a massive interior renovation.

With a focus on managing to outcomes, the success of CCA is due to the use of proven best-practice service-delivery approaches as well as excellent property-management systems. Services are very focused on specific tenant needs, using models with a range of intensities as appropriate for the individual. CCH's successful performance with the Civic Center development also has come from the property management's expert ability to keep rent collection between 97 and 98 percent over the past two years, occupancy over 96 percent, turnover time to reoccupy a vacant unit within three days, and work orders completed within one day, on average. CCH's innovative program houses chronically homeless individuals needing a deep level of supportive services with other low-income individuals, within a more traditional affordable housing development. This model is a proven success and is emulated by others across the country.

### The Organization

The Colorado Coalition for the Homeless is a nonprofit organization established in 1984 to respond to the growing crisis of homelessness in Colorado. Its mission is to work collaboratively toward the prevention of homelessness and the creation of lasting solutions for homeless and at-risk families, children and individuals throughout Colorado. CCH advocates for and provides a continuum of

**PROJECT TYPE**

Historic rehab, single-site supportive housing for chronically homeless individuals integrated within an affordable housing development; one six-story building with 216 rental apartments (167 SRO, 35 efficiencies, 14 one-bedroom units); property also houses the Denver Central YMCA

**RESIDENT PROFILE**

93 percent single adults; 50 percent chronically homeless; 16 percent suffer from severe and/or persistent mental illness; 6 percent have physical disabilities; 59 percent Caucasian, 25 percent African American and 14 percent Hispanic

**RENT STRUCTURE (MONTHLY)**

SRO units: \$320-450  
Efficiencies: \$367-475  
One-bedroom units: \$650-700

**OCCUPANCY RATE**

FY 2006: 96 percent  
FY 2005: 98 percent

**KEY FEATURES**

Integrated supportive and affordable housing; multi-faceted services model with multiple funding sources; historic building—where basketball was invented; includes cook top in every unit and a large community kitchen

**KEY SERVICES**

Assertive Community Treatment (ACT) services delivered on- and off-site, in partnership with other service organizations in the community; Integrated Dual Disorder Treatment services on site; services for residents with mental illness, including case management; includes a federally qualified health center

**PROJECT COST**

Total development cost: \$23,500,000  
Per unit: \$108,796

**CONTACT INFORMATION**

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housing and a variety of services to improve the health, well-being and stability of those it serves.

Since 1990, CCH has developed and currently manages more than 1,200 units of affordable housing. CCH runs a clinic that serves more than 8,000 homeless adults and children each year; administers 29 transitional housing programs in metro Denver and rural Colorado; and operates a children's center that serves up to 147 children between the ages of 6 weeks and 12 years. In FY 2008, CCH had an annual operating budget of \$31,156,000.

**The Project**

CCH is the owner, developer, service provider and property and asset manager for the Renaissance at Civic Center Apartments and its residents. CCH purchased the building in 2001 to preserve (and improve) its more than 159 affordable single-room occupancy (SRO) rental units. The building remained occupied throughout the two-plus years of restoration and renovation. CCH expanded the number of units to 216 with 167 SROs, 35 efficiencies and 14 one-bedroom apartments. Up to 50 percent of the 216 units are occupied by individuals who were formerly homeless and suffer from one or more disabilities, including severe and persistent mental illness, chronic substance use disorders, multiple disorders and physical disabilities.

CCH funded the majority (61 percent) of the project's development capital through a combination of Low Income Housing Tax Credit equity (36 percent) and a Section 108 Community Development Block Grant (CDBG) loan (25 percent), with an additional 21 percent from the combination of a commercial bridge loan and a First Bank construction loan. Other funding sources included the HUD HOME Program, the Economic Development Initiative and the city and county of Denver.

CCH has fully integrated affordable housing, resident services and supportive housing. For those assessed with the highest level of need, the Assertive Community Treatment

(ACT) model is utilized. The three ACT teams bring services to the resident rather than requiring the resident to come into an office. This decreases fear and improves the therapeutic alliance, which results in increased acceptance of treatment. Team members form trusting relationships with residents and provide a full array of services needed to help residents live independently. While participation in the services is completely voluntary, assertive outreach efforts work to keep residents engaged.

The organization has maintained a consistent rent collection rate at the CCA development of between 97 and 98 percent. Cash flow for the property was \$114,492 for FY2006 and \$233,463 for FY 2005.



This unit was once part of the YMCA where basketball was invented in the 1800s. When renovated into an apartment, the basketball court was maintained, adding a unique design element.

## Supportive Housing Summary

Renaissance at Civic Center follows the model of CCH's supportive housing programs, with on-site services providing a safety net designed to meet the immediate and on-going needs of homeless individuals until they can connect with traditional, mainstream community services. Collaboration with local community partners is, therefore, integral to each resident's success.

Funding for CCA service programs and operations comes from a fiscally diverse revenue stream of government contracts and public contributions. CCH's aggressive fundraising strategies target eligible federal, state and municipal funding sources as well as private foundations. Funding sources for FY 2007 included HUD, the Veterans Administration, the city and county of Denver, the Bureau of Primary Healthcare, the Colorado Health Foundation, Caring for Colorado, Colorado's Department of Public Health, and housing vouchers from multiple public entities.

The service approach is varied, depending on specific individual needs, with the focus on behavior. At any given point in time, 25 percent of the target population receives Assertive Community Treatment Services from a multi-discipline/multi-agency treatment team. Those services are time unlimited and include assertive outreach and engagement, mental health and substance abuse treatment, and direct links to medical care.

The Housing First model, combined with intensive clinical case management services through the ACT model, moves individuals directly from the street into permanent housing at CCA. Each resident is then offered a variety of wrap-around services with the goals of maintaining their housing, improving overall physical and mental health and, when applicable, recovery.

For individuals with a primary substance use disorder who want to live in a clean and sober environment, there is a special wing within one floor of the building that contains 20 SRO units. Residents in this wing are self-monitored by the recovery community and supported by professional addiction service providers.

The Housing First teams boast a 77 to 85 percent housing-retention success rate for this traditionally hard-to-serve population (which had an average eight years of homelessness prior to entry) and have documented an overall reduction in emergency-services costs by 73 percent, or \$600,000. The total emergency cost savings averaged \$31,545 per chronic homeless participant, as the use of emergency room care, inpatient medical and psychiatric care, detox services, incarceration and emergency shelter were significantly reduced by participation in the program. CCA also has a federally qualified health center, a cutting-edge practice that not only provides on-site medical care for residents but increases access to Medicaid and Medicare funding—a significant source of dollars in a scarce services-funding environment.

Homeless veterans are another critically underserved population, with more than 3,000 homeless vets in Colorado. At the CCA, CCH has succeeded in obtaining per diem funding from the Veteran's Administration for 19 vets living in the sober wing of the property.

Evaluations have also documented overall improvement in the health status and residential stability of program participants. Fifty percent improved their health status, 43 percent improved their mental health status and 64 percent improved their overall quality of life. Importantly, the average monthly employment or benefits income of program participants increased from \$185 at entry to \$431, helping improve residential and personal stability.

Finally, all residents can partake in a broader offering that includes social activities, personal finance supports, shopping trips and more.

## Physical Features

The Renaissance at Civic Center Apartments redevelopment was carefully designed to support residents. It consists of two joined properties: the 1906 and 1958 YMCA buildings. The project was a full rehabilitation of the existing Y's apartments and recreational facility, so opportunities arose to interview residents and learn their needs and preferences. The organization blended existing residential areas with new residential areas created from former recreational use areas. All residential units were grouped together; each residential floor has a meeting and laundry area.

Most units in the building contain a mini-kitchen with microwave, half refrigerator and sink. A large community kitchen is also available with a full-size refrigerator, oven, cooktop with burners and seating for large family groups. Some residents use the community kitchen on a daily basis, while others reserve the kitchen for private gatherings.

Each unit is designed to minimize repair work orders and prevent foreseeable resident damage. All the floors are hard surfaces, the furniture has simple lines and the window coverings are blinds. CCH preserved the historical basketball court floors in the new units that were built in the gymnasium.

Resident safety and health were central to the design. Exterior doors are locked (with emergency push bar exiting) or are card-key controlled. All exterior doors are alarmed to signal an open door. The main entrance has 24-hour office staff and night-time security. Thirty-two cameras with recording devices monitor all corridors and entrances. A new interior fire exit stairwell replaces the original exterior fire escape ladders. The fire sprinkler system completely covers both buildings and elevators are key-code controlled.

### Resident Involvement

When CCH acquired the building in 2001, the organization immediately held a meeting open to all current residents, who provided input on unit design, including bathrooms, kitchens, telephone, satellite TV and community and laundry rooms. The current weekly housekeeping services were created based on resident needs, in addition to the current house rules, which are updated with input from residents.

All CCH program participants, including CCA residents, are invited to participate in the CCH Consumer Advisory Board, which meets monthly to review all programmatic changes and advises the CCH board of directors on the appropriateness and effectiveness of current CCH programs. The board also has an open seat for any CCH client who wishes to participate. CCA residents regularly communicate with the director of property management, the president, the three vice presidents and the directors of mental health and medical services.

A “next steps” focus group made up of residents and staff meets monthly to target program improvement in areas such as employment and volunteer options, social opportunities, computer and Internet training and other quality-of-life issues. The project also provides a clean and sober clubhouse, which is entirely client run. Participants use the clubhouse as a safe community forum in which to solve daily living problems peer to peer. They can also bring concerns to ACT team members either directly or via the paid clubhouse staff.

### Community Impact and Neighborhood Relations

Renaissance at Civic Center Apartments makes a unique and important contribution to the downtown Denver neighborhood. When CCH acquired the building, it was set to be demolished to make way for new commercial development. CCH was determined to preserve and expand the critical affordable housing units in the center of downtown Denver. In November 2004, Renaissance at Civic Center Apartments received the Historic Denver Award for the restoration of the 1906 YMCA. It is one of only four Neo-Classical Revival style buildings in downtown Denver.

The service teams located at CCA also provide ACT services to homeless individuals living in other nearby housing developments. This connection to the community allows CCH to serve additional chronically homeless people while integrating services within the community. The Downtown Denver Partnership is the neighborhood organization serving the Civic Center neighborhood. CCH collaborated closely with the partnership prior to acquiring the property and throughout the renovations. They continue to do so on issues concerning building operations, programs and services.

## Summary

The integrated affordable and supportive housing model, which the Colorado Coalition for the Homeless has been using for years, is growing in acceptance as the best approach for housing homeless people by providing a much more normal living environment. Residents witness the progress of their peers on a daily basis and are provided with positive models of what it looks like to increase independence through hard work, sobriety and employment. All of these factors contribute to individual success, and many residents are able to move on to other affordable housing after stabilizing their situation at CCA. CCH's heavy emphasis on evaluation, documentation and rigorous research, and use of evidence-based practices, has proved extremely effective over the years. Finally, CCH used green building practices well before the movement took off in the name of cost savings.

## THE ST. GEORGE HOTEL

Skid Row Housing Trust, Los Angeles

The Skid Row neighborhood in downtown Los Angeles is infamous for having the highest concentration of homeless people in the nation. Large numbers of people are living on the streets, virtually all requiring treatment for mental health and serious medical conditions. In the midst of this setting, however, stands the St. George Hotel, a Skid Row Housing Trust (SRHT) property that provides 87 units of high-quality supportive housing to formerly homeless single adults. The St. George is a shining example of the increasing number of properties being developed in Skid Row to provide permanent solutions for this terrible situation.

SRHT has been accepting residents into the St. George Hotel program since late winter of 2004. Over the years, the organization has continually found new and innovative methods for meeting their clients' needs, including forming partnerships with area service providers and, more recently, providing on-site medical exams and services, thus greatly improving their residents' health.

### The Organization

SRHT is one of the largest providers of supportive housing for individuals with low incomes in Los Angeles. SRHT was formed in 1989 by concerned activists and business leaders to respond to the rapid disappearance of affordable, permanent housing in Los Angeles' Downtown community. The organization mobilized public investment and private equity to preserve and rehabilitate hundreds of SRO units that would have otherwise been lost. Dilapidated slum hotels were renovated and transformed into safe, attractive and affordable housing that both provided housing opportunities for individuals with extremely low incomes and strengthened the fabric of the Skid Row community.

Since its inception, the SRHT has constructed beautiful and award-winning buildings that provide both a home and a community for formerly homeless residents with very low incomes—many of whom suffer from mental or physical disabilities. Today, the agency is a thriving permanent housing developer with 20 permanent housing sites providing 1,274 housing units for homeless residents of Skid Row. It fosters residential stability, constructive social support systems, and positive life choices through the development of high-quality housing and resident services. During its 19 years, the SRHT has secured more than \$130 million in public and private funding to rehabilitate and provide



The St. George Hotel, in the middle of the infamous Skid Row neighborhood, maintains the integrity of this once grand and attractive hotel.

**PROJECT TYPE**

Historic rehab, single site; one six-floor building with 87 residential units of supportive rental housing; 60 single-room occupancy (SRO) and 27 efficiency apartments

**RESIDENT PROFILE**

All residents are formerly homeless single adults and earn below 30 percent of AMI; 32 percent have physical disabilities; 14 percent are HIV positive or have AIDS; 47 percent have a severe or persistent mental illness; 31 percent have a chemical addiction; 67 percent African American, 19 percent Caucasian, 12 percent Hispanic, 2 percent Asian/Pacific Islander

**RENT STRUCTURE (MONTHLY)**

SRO units: \$496-524  
Efficiencies: \$496-650

**OCCUPANCY RATE**

FY 2006: 92 percent  
FY 2005: 96 percent

**KEY FEATURES**

Housing First model; services partnerships; historic property; focus on design to foster resident pride and increase marketability; "green" building with a solar-panel roof

**KEY SERVICES**

Case management, mental health, substance abuse treatment including both harm reduction and abstinence models, on-site primary medical care, benefits advocacy, integrated treatment team including links to additional community-based services

**PROJECT COST**

Total development cost: \$9,200,000  
Per unit: \$104,545

**CONTACT INFORMATION**

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rental assistance for its residents. In FY 2008, the agency had an annual operating budget of \$2,810,530.00.

**The Project**

SRHT handles all of the operations for its St. George Hotel property, first as developer and now as asset manager, property manager and service provider. The property was acquired in October 2001, and opened its doors to residents in February 2004. St. George provides permanent housing and supportive services to 87 formerly homeless single adults. All residents earn 30 percent or less of the area's median income, and most present with one or more physical, mental or substance abuse issues.

Development funding for the St. George Hotel came from a variety of sources, with the majority (74 percent) in the form of Low-Income Housing Tax Credit (LIHTC) equity. An additional 11 percent was provided by Los Angeles County, 7 percent from the Affordable Housing Program of the Federal Home Loan Bank System, and 4 percent each from the HUD HOME program and foundations and corporations.

SRHT has consistently managed a high occupancy and rent collection rate, despite serving one of the most difficult populations. In FY 2005 and 2006, the rent collection rate held at 99 percent; in FY 2005 the occupancy rate was 92 percent, climbing to 96 percent in FY 2006. The average turnaround time for occupying a vacant unit is 30 days, and management inspects each unit twice per year.

Units are inspected twice a month to ensure all housing quality standards are met. These basic standards indicate that the unit must be clean and does not invite pests. This is reflected in the fact that no more than 6 percent of maintenance calls are for residents units. Work on units is completed within 72 hours of request except for emergency repairs.

**Supportive Housing Summary**

The St. George program incorporates the key elements of a Housing First model: the direct or nearly direct placement of targeted homeless people into permanent housing, with service provision

beginning after placement. On-site services and the proximity of the St. George Hotel to multiple ancillary services on Skid Row maximize client independence, allowing them to easily access services in residence or from other organizations in the community. Eighty-six residents have access to on-site comprehensive support services via the Skid Row Collaborative (SRC). Initially funded as a national pilot project, the SRC is a multi-agency effort among SRHT, the JWCH Institute and Lamp Community.



The lobby is welcoming and inviting, while still providing staff with the ability to monitor the property's safety with color security monitors discretely placed under glass in the interior desk counter top.

Long-term contracts with HUD's Shelter Plus Care program provide 600 subsidized rental units to SRHT and these contracts are renewed non-competitively each year. The organization also secures millions of dollars in in-kind services from community organizations as part of its Shelter Plus Care program requirements. The St. George Hotel service program has received funding from both public and private funders, including the Fannie Mae Foundation, Los Angeles County and the Corporation for Supportive Housing.

Both JWCH Institute and LAMP community provide access to additional supportive services at their respective agencies including specialty medical care, dual diagnosis treatment, dental care and safe haven respite. In addition to formal collaborations, the original SRC partners continue to provide services to the St. George residents. Community-based links are critical to the success of the SRC, and case managers collaborate closely with surrounding service agencies to facilitate resident access to off-site services. In 2007, community-based agencies provided \$301,237 in in-kind supportive service to SRC.

The first step toward providing St. George residents with the proper care is the resident's needs assessment by the case manager. Next, the resident and integrated team jointly develop a treatment plan that addresses the resident's specific needs; planning is flexible and client-centered. The initial assessment and treatment plan is completed within 30 days of program entry and formally reviewed each six months. Services staff perform on-going assessments, adjusting the treatment plan accordingly between formal assessments.

Permanent affordable housing is combined with an integrated treatment team that provides services on-site as well as links to existing community-based services. The SRC emphasizes increasing resident stability, income and self-determination. The treatment team includes the case manager, a medical provider, psychiatrist, nurse, substance abuse counselor, licensed vocational nurse and supportive

housing supervisor. Key services include: on-site primary health care provided by a licensed medical practitioner, a medical assistant and a licensed vocational nurse; substance abuse services that include on-site care, access to an off-site detox center and outpatient treatment; mental health services that are supervised by a licensed psychiatrist and provided in-kind—a licensed clinical social worker responds on-site to mental health crises; and case management services. A case manager is assigned to each program participant and helps to ensure each resident's access to on-site and community-based services, conduct initial and on-going assessments, update treatment plans, meet on a bi-weekly basis, provide coordination with the treatment team and more.

## Physical Features

The building's rehabilitation contributes to the building's overall success because it was designed at the outset to maintain the integrity of a once grand and attractive hotel; it is a beautiful building to live in, and residents can and do take pride in their homes. The exterior is kept clean of refuse, the sidewalks are washed each day and garbage is stored properly. The doorways and entrance are free from loiterers and secured 24 hours a day. The interior is well maintained and furnished with high-quality products that also convey a sense of permanency and pride. The front floor-to-ceiling picture windows include salvaged Frank Lloyd Wright decorative glass panels, incorporated at the top of the glass walls. There are multiple communal spaces that encourage gathering, socializing and connecting among the residents. Meals can be cooked and eaten collectively and there are two lounge areas.

The lobby and the manager's office are maintained in a professional, welcoming manner. The lobby is a beautiful space; the front desk is particularly attractive. Color security monitors behind the desk are discretely placed under glass in the interior desk counter top, to be unobtrusive and avoid an institutional look. All apartment units are equipped with phone jacks, a bed, desk and other amenities that encourage permanency and a sense of ownership for residents. This property also has some excellent green features and retrofits, including a solar panel roof that is part of the BP Solar Neighbors

Program™, supported by Hollywood celebrities and led by actor and Enterprise Trustee Edward Norton. It was the West Coast's first solar electric system installation for a low-income multi-unit building.



The St. George provides permanent housing and supportive services to 87 formerly homeless single adults in the form of well-designed single room occupancy units and efficiencies.

## Resident Involvement

Feedback from residents on the quality of services is routinely solicited, both formally and informally. Residents attend monthly community meetings and are able to choose topics for the agenda.

Concerns that are not appropriate for St. George community meeting are addressed by supportive housing management staff or the treatment team.

Residents are also offered the opportunity to submit concerns via an anonymous suggestion box that is checked weekly and reviewed by the property manager and service staff.

Submitting potential solutions to identified problems is strongly encouraged by the SRHT staff. For example, when residents felt that the vending machines in the building were too expensive, they took it upon themselves to identify a different vendor who offered a lower, more affordable price for vending items. Residents also have input into operations in terms of designing house rules that respond to unique concerns, including use of the community kitchen, outdoor cooking procedures and laundry room etiquette.

A more formal measurement of resident satisfaction is currently underway with the Los Angeles Homeless Services Authority's Cost Avoidance Study. Resident satisfaction is a significant factor in the study, which formally interviews residents, provides them an in-depth questionnaire and a follow-up interview.

The service staff at the building actively recruits residents who have a particular talent or skill to present to the rest of the residents. Knitting groups, reading clubs, neighborhood clean-ups and writing groups have all been launched by residents of the building. These activities allow them to showcase their talent or hobby and teach their neighbors a new skill. They are also encouraged to participate in special events hosted at the building. Several groups from the community tour St. George each year. Residents are involved in showing their individual units, explaining services and sharing their successes when desired and appropriate. Residents have also chosen to speak at public hearings or meetings, meet personally with public officials and provide testimony at funding or policy hearings in support of the St. George residence and program.

## Community Impact and Neighborhood Relations

The St. George Hotel project has increased the collaboration of service providers on Skid Row and has brought homelessness to the attention of local policy makers and community leaders. Outreach to community members has been a valuable tool; staff members participate in broader community collaborations, formally present the program to community groups and invite community members to see the program firsthand through tours and open houses. Staff members regularly provide outreach to a variety of local community groups and present the St. George model at conferences around the country.

Volunteer opportunities with other community-based organizations are facilitated by the case manager. Residents identify an organization they are interested in helping, and the case manager works with the residents to identify volunteer opportunities at the organization. Residents have opted to volunteer at such places as a battered women's center, a drop-in day center, a safe haven and the local supported employment agency.

Interested residents are involved in the area community and in community leadership as well. Some belong to the Los Angeles Community Action Network, a grassroots organization that focuses on preserving the rights of the homeless.

## Summary

It is estimated locally that the need for permanent housing exceeds the supply by almost three to one and that the need for supportive services exceeds supply by more than six times. In the midst of what may be the worst homelessness conditions in the nation and a serious dearth of services funding, the St. George Hotel is providing an extremely high-quality housing option for their residents. This beautiful property is providing a critical housing plus services resource to the local community and the city of Los Angeles. The St. George Hotel and its on-site service model, the Skid Row Collaborative, is considered a model program in the supportive housing community. It moves beyond Los Angeles' traditional emergency response to homelessness to provide chronically homeless people with a permanent and supportive place to live.

## DOORWAYS SUPPORTIVE HOUSING FACILITY

DOORWAYS Housing, St. Louis, MO

DOORWAYS Supportive Housing Facility (DSHF), opened in 1997, serves formerly homeless single adults who suffer from HIV/AIDS. The fully accessible three-story building offers 36 private rooms with baths, 24-hour supervision and nursing care, a dining room, commercial kitchen, recreational areas and administrative offices. Program staffing includes registered nurses who work with physicians to establish treatment plans and oversee complicated medical protocols.

Although DSHF is licensed in the state of Missouri as a residential care facility, the property functions as permanent supportive housing. It is the only program of its kind in the region, and was one of the first in the United States to provide intensive residential services to people living with HIV/AIDS. Residents coming to DSHF in 2007 had an average income of less than \$500 a month, 22 percent had no income whatsoever, and 40 percent of these had co-occurring behavioral disorders.

### The Organization

Twenty years ago, after seeing people reduced to poverty, isolation and desperation by the social reaction to a devastating disease, people of faith in the St. Louis metropolitan bi-state region sought to demonstrate a shared belief in compassion. In February of 1988, representatives from Catholic, Jewish, and virtually all of the major Protestant faiths came together to formally incorporate DOORWAYS as a 501(c)(3), the St. Louis region's only interfaith organization devoted to the provision of safe, affordable housing and supportive services to people living with HIV/AIDS. This mission is based on a conviction, since solidly affirmed through research, that adequate housing is the primary requisite for the most efficient, cost-effective and compassionate treatment, management and prevention of the disease.

DOORWAYS has spent 20 years developing housing solutions for some of the most vulnerable individuals and families in its community, a comprehensive continuum of housing options designed to meet the varied needs of people living with HIV/AIDS and their families. This continuum includes



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more than \$1.7 million annually in scattered-site rent, mortgage, and utility assistance, 99 subsidized units in the city of St. Louis, and a 36-unit SRO property. Since its founding, DOORWAYS has served more than 5,600 households and currently assists approximately 570 adults and more than 300 children each month. The annual operating budget for the organization in FY 2008 was \$5,320,499.

## The Project

DOORWAYS acquired the property that now houses its Supportive Housing Facility in December of 2004, performed a gut rehab and opened to residents in February of 2007. About 36 percent of the capital funding for DOORWAYS Supportive Housing Facility (DSHF) came from a Missouri Housing Development Commission Loan; 20 percent from private charitable contributions; 18 percent from the HUD Community Development Block Grant (CDBG) program, 14 percent from the HUD HOPWA program and some 13 percent from the HUD Supportive Housing program.

Today, DSHF provides 36 units of transitional and permanent supportive housing to people living with HIV/AIDS and typically serves about 50 clients on an annual basis. Clients are referred to DSHF through assigned case managers at a variety of local organizations that comprise a coordinated system of care.

Operational funding comes through an agreement with the city of St. Louis, which, in turn, receives funding from the U.S. Department of Housing and Urban Development through a Continuum of Care agreement. Additional program funding is supplied by the city of St. Louis Affordable Housing Commission and a variety of private foundations and corporate funds.



In addition to the AIDS memorial garden shown here, residents have access to an outdoor courtyard deck, shielded from the public street, that affords outdoor privacy during temperate seasons.

The occupancy rates have remained fairly stable (at 88 percent for both FY 2005 and 2006) as the staff succeeds in assisting clients in this service-intensive environment.

Since DSHF first opened, there have been major treatment advances for people with HIV/AIDS. As a result, the majority of the program's residents now stay at DSHF to eventually transition to living independently, rather than living their lives out at the property. The few clients who are discharged and have not reached the necessary level of independency are transferred to even higher-level service in hospitals, skilled nursing facilities or psychiatric treatment programs.

Rates of rent collection have shown steady improvement (increasing from 91 percent in FY 2005 to 100 percent in FY 2006) as social workers and the resident-life coor-

dinator are increasingly successful helping clients to live within their budgets and take on the responsibilities that will promote independence. In addition, the resident-life coordinator has improved the collection of back-owed rents, and has reduced the outstanding obligations to an immaterial level.

### Supportive Housing Summary

The DSHF service team collaborates with a broad network of institutions and community-based organizations in the coordination of care for residents. Central to the structure of the program is the partnership with SSM Home Care (SSMHC), the provider of 24-hour home care services to residents. Through this service partnership, program staff includes both registered nurses and certified nursing assistants who work with physicians to establish treatment plans, oversee complicated medical protocols, monitor dementia and other neural disorders, and perform clinical assessments and treatments. Through the health care component of DOORWAYS services, more than 18,000 doses of medication are dispensed monthly. SSMHC services are delivered at no cost to residents. DOORWAYS funds some of its on-site nursing services with a Medicaid waiver, an innovative practice.

Another service partner is Community Alternatives, a certified substance-abuse treatment agency that has demonstrated a skilled commitment to the chronically homeless and to those with HIV/AIDS. Community Alternatives is a key partner in the provision of mental health and substance abuse services to those who are able and willing to access community-based support systems with transportation and home-site reinforcement provided by DOORWAYS.

DOORWAYS employs a “low-demand approach” to services, which is a best-practice model both for people living with HIV/AIDS and for chronically homeless individuals who suffer from co-occurring behavioral disorders. All residents have private rooms and baths and are, except in exigent circumstances, not required to participate in any services or treatment as a condition of their stay. Research has demonstrated that residents in low-demand housing have better treatment outcomes without worsening symptoms of substance use or psychiatric disorders.

#### PROJECT TYPE

Historic rehab, single site; transitional and permanent rental; one four-story building with former carriage house; 36 single room occupancy (SRO) units in modified congregate style: bedroom and bath with shared kitchen and dining facilities

#### RESIDENT PROFILE

All residents are formerly homeless single adults who suffer from HIV/AIDS and earn less than 30 percent of AMI; majority are African American (73 percent) and male; 65 percent have substance abuse issues; 63 percent have a mental illness; 11 percent have physical disabilities; 9 percent are senior citizens

#### RENT STRUCTURE (MONTHLY)

Average rent: \$436

#### OCCUPANCY RATE

FY 2006: 88 percent  
FY 2005: 88 percent

#### KEY FEATURES

Services funding innovations; a place residents proud to occupy and where they come to get healthy; beautiful memorial garden, historic renovation in an historic neighborhood; the design and success have helped to improve the neighborhood as a whole; cooktop in each unit as well as community kitchens and meal services

#### KEY SERVICES

Extensive on-site medical services, resident-driven food program with healthy meals; focus on helping residents to gain independence; low-demand approach to services and harm reduction approach to behavioral disorders

#### PROJECT COST

Total development cost: \$3,200,000  
Per unit: \$89,000

#### CONTACT INFORMATION

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It is well documented that behavioral health disorders are common among people with HIV and continue to have a negative impact both on the progression of the disease and on adherence to treatment. In working with clients who struggle to overcome these issues, DSHF has adopted a “harm reduction” approach: a client-centered alliance between the client and the caregiver in which the client is the expert. Clients express which aspects of their overall substance use or mental health are problematic for them, and which they have a desire to change. Incremental steps build toward an ultimate goal—even if that ultimate goal is not complete sobriety. As a treatment modality, it has gained foothold through efforts to address both HIV/AIDS transmission and chronic homelessness. Among an HIV/AIDS population, it has shown great efficacy in promoting an increased adherence to treatment regimens and a reduced level of engagement in transmission-related behaviors.

DSHF is a truly permanent housing solution for one in five clients served, whose length of residency currently ranges from just under eight years to just over 11. Some with developmental disabilities or other diagnoses will make their homes there for the rest of their lives. For the other 80 percent, a return to healthy independence can be a viable goal. DSHF social workers help clients achieve access to mainstream financial services whenever possible, and the resident-life coordinator and social workers help clients develop a budget and learn to govern their spending. The continuum of housing options within Doorways’ larger organizational structure allows many clients to make a seamless transition into independent housing when they leave the DSHF environment. Others regain a level of physical health and functioning that allows them to return to family living environments.

In 2007, 76 percent of clients exited DSHF to independent living, and only 4 percent returned. The average income available to residents increased by 31 percent, as 100 percent of those who walked through the door with no available income were connected to government-funded financial benefits. In addition, all new program residents achieved measurable health improvements as a result of services delivered.

## Physical Features

Though not its first attempt to marry historic preservation to client-centered goals in its properties, DOORWAYS’ crowning achievement in the realm of restoration took place with the DOORWAY’S Supportive Housing Facility. This once abandoned and blighted building now provides an anchor on a block that has been substantially redeveloped and stands as a shining example of historic preservation. The property was recognized by the Landmarks Association of St. Louis as one of the Eleven Most Enhanced Projects of 1997.

Each resident has a single room with an attached private bath creating 225 square feet of private living space. The suites are equipped with cable television, ceiling fans and telephones. Each resident can control heating and cooling for their own space, an important feature for people living with AIDS. Each room is also equipped with large, double-pane, insulated, historic-profile windows, creating an environment that is light, welcoming and comfortable for the residents.

Access to cooking facilities is provided on each floor, but most residents take advantage of community meals served three times daily in the property's dining room. Each floor of the building has common rooms that offer televisions, refreshments, and gathering space for both formal and informal activities. An outside courtyard deck, shielded from the public street and surrounding properties, is located in the center of the U-shaped structure, providing green space that is visible from each floor, and affording residents outdoor privacy during temperate seasons. The property is secured by 24-hour staffing and an effective system of security alarms and cameras. The interior elevator is also programmed to make designated stops to promote the safety and security of residents. Administrative staff occupies roughly 3,000 square feet in the basement of the building.



The DOORWAYS Supportive Housing Facility in St. Louis provides 36 single-room occupancy transitional and permanent supportive housing units for homeless single adults with HIV/AIDS.

In the design of the building interior and systems, care was taken to create a property that was responsive to the critical health needs of the clients. Negative air-pressure ventilation systems move exhaust from resident rooms out through the roof instead of through common areas, so that airborne infections are removed harmlessly and not transmitted to other residents. Similarly, two resident rooms and two treatment rooms are equipped for 12 air changes per hour, an uncommonly high air transfer rate, so that airborne particles from infection or treatments are diminished quickly and without exposure to other residents.

“Green” principles were adopted to the extent possible in the original design and location of the property. In addition to the expansive green space and formal garden elements, the site was chosen to provide residents with easy access to public transportation, and within walking distance of a wide array of shopping, entertainment, and healthcare services. In the summer of 2007, significant changes were made to the landscape to improve water conservation and reduce maintenance costs, while still maintaining the property's crowning presence in this urban landscape. High-maintenance perennials were replaced by drought-tolerant shrubs and potted plants, and the watering system for the AIDS Memorial Garden was upgraded for increased efficiency.

## Resident Involvement

The Resident Council meets monthly with staff to discuss concerns, offer suggestions and provide guidance in the improvement of the property and its services. All residents of the Supportive Housing Facility are eligible to participate in the council, and approximately 50 percent elect to do so in any given month. Each month, one topic for discussion is the meal plan menu, and residents are

encouraged to offer suggestions and even to contribute family recipes that would make them feel more comfortable and involved in their food choices. The council also helps to plan activities and events for the coming months, including regular bingo, movies out and structured field trips. Feedback from the council over the last several years has resulted in changes to the fitness and recreational equipment available for use by clients and has helped to identify weaknesses in staff functioning that have been addressed through expanded in-service training.

DSHF residents also gather monthly for resident health maintenance groups, which provide an understandable outline of the issues and options involved in HIV/AIDS treatment, helping them to become informed consumers of their own health care. Through this process, residents are empowered to make more informed choices about the health care options available to them, and to critically assess the care provided. On an annual basis, residents of DSHF complete a client satisfaction survey, the results of which are disseminated to program participants, other programming departments, and to the board of directors. The results are acted upon as appropriate.

### Community Impact and Neighborhood Relations

One of DOORWAYS' development principles is to look for neighborhoods that have active leadership, engaged residents, and/or an established revitalization plan to guide or inform development efforts. The presence of these elements is critical to the long-term success of specialized housing, and the ability to work collaboratively with neighborhood leaders has been a hallmark of its housing development efforts.

DOORWAYS is located in St. Louis' Central West End where revitalization efforts were well underway in the '90s. The Maryland-Boyle Neighborhood Association had attempted on several occasions to work with developers to rehabilitate a more than 120-year-old building that had been abandoned for more than 15 years. Three previous re-development efforts had failed as developers turned away from exorbitant costs and the challenges of rehabilitation in the historical context. The association was willing to consider even demolition to eliminate the blight. Both the Heritage and Urban Design Commission and the neighborhood association perceived DOORWAYS' interest to be the last chance to salvage the structure. As DOORWAYS succeeded in convincing neighborhood leadership of its responsible stewardship, they became enthusiastic partners in the effort and worked closely with DOORWAYS throughout the development and construction of the supportive housing property.

Another principle employed to guide development efforts for the Supportive Housing Facility was to work with area residents to identify ways that DOORWAYS could contribute more than housing to the revitalization efforts underway. Thus, on the campus of the Maryland property sits the AIDS Memorial Garden, a public reflective space enjoyed by all residents of the neighborhood. As a gift to commemorate DOORWAYS' beautiful restoration of the building, the Landmarks Association donated a 150-year-old limestone pedestal reclaimed from the demolition of the old Sacred Heart Church, and this gift is now used as a structural feature of the garden. An old carriage house on the

campus has also been remodeled to provide meeting and workshop space for outside groups, as well as for DOORWAYS' clients and staff.

## Summary

This AIDS housing property is the first in the city of St. Louis, developed by a leader in the state, a real pioneer and a prominent national voice. A major food program with well-planned menus that respond to resident requests and a limited short-order request menu available at every meal are central to the focus that the DOORWAYS program places on residents regaining their health. The property functions and operates as permanent supportive housing, even though it is a licensed residential care facility. This designation was sought to get the services dollars needed within the state of Missouri. When first built, people came to DSHF to die in peace, comfort and dignity. Now they come to grow healthy and then move on—or to stay, if that is what is best for them. The DOORWAYS program has found creative ways to bring services to this population with extreme medical needs, so that they can work towards living normal lives. The historic renovation of this property has also made a real difference in turning around the neighborhood. It has helped tip the scales away from a community rife with crime and drugs, bringing back private development and a desirable residential community.

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