



Housing and Services Resource Center

Ohio Solutions for Housing and Services

Office Hour Series | Take-Aways

HOW CBOs CAN SPONSOR, DEVELOP, OR CO-DEVELOP AFFORDABLE HOUSING

Thursday, January 13th from 4:00-5:00 pm Eastern

Presenters:

- Joseph Recchie, CEO, Community Building Partners and Praxia Partners
- Duana Patton, CEO, Ohio District 5 Area Agency on Aging, and Board Member, Ohio Association of Area Agencies on Aging
- Justin Moor, Vice President of Planning and Program Development, Area Office on Aging of Northwestern Ohio

Stakeholders from housing and community development and aging services discussed how they developed partnerships to expand affordable housing and access to community-based supportive services.

- Community-based organizations (CBOs), including those in the aging and disability networks, can solely develop or partner with housing developers in building units and providing services to tenants. When CBOs play a role in sponsoring or co-sponsoring a housing development, they can negotiate to receive a share of the development fee or to retrieve some of the income generated through property cash flow to support service provision.
- A CBO's first step is gaining support from the board of trustees/directors for an expanded role in connecting services with housing and helping the community expand affordable, accessible housing.
- Another tactic is to find a housing friend/mentor/colleague who helps you:
 - Develop a solid proposition for why your CBO's involvement in the development and/or future operations adds value to the business partners. Make sure the proposition is a win-win. For example, we can help you connect with this population to fill the units and our services will help you retain tenants and reduce problems.
 - Get a seat at the table where deals are made, planning and policy decisions are set, housing needs are assessed, and government funding is prioritized. There is a lot of competition for seats, and having a current "insider" pull you in can make a difference.
 - Show you the ropes as you learn and navigate a new sector.

- In every meeting, announce your CBO's interests and capabilities. Even if the meeting itself doesn't directly result in opportunities, as your CBO becomes known, opportunities will begin to present themselves.
- In every discussion, be ready with potential solutions to improve housing options and access to supportive services.
- Capitalize on existing relationships and learn about potential partners. With them, create a shared vision and engage community members and leaders in supporting that vision.
- Dogged perseverance may be necessary, but outcomes like a 15-year non-cancel contract for service coordination or a share of the development profits can make it all worthwhile.

As opportunities take shape:

- CBOs have a range of roles they can play: sign as a co-sponsor on an application, serve as one of the development partners, obtain a contract to provide services to the residents to improve stability, provide land for the development, or even be the primary developer and property manager.
- Financing may seem very difficult but doesn't need to be. Throughout the U.S., communities and states have new opportunities to expand affordable, accessible housing and reduce homelessness through their American Rescue Plan Act funds.
 - Now is the time for CBOs and the people they serve to be educating decision-makers about housing needs of people with disabilities and older adults.
- The financing package needs to anticipate that 1) operating costs will increase and 2) residents' income is unlikely to keep pace with inflation. To mitigate these future challenges, consider:
 - Green design and renewable energy sources; these design aspects may enable you to tap into additional sources of funding and keep operating costs down;
 - Options to keep the rents affordable, such as getting donated land or a no-cost 99-year lease of land;
 - Mixed-income development in areas with high market rates, where the income from those units can offset the subsidized housing units;
 - Contracts that enable the CBO to capture any surplus money or deferred developer fees to support service coordination.
- Once you have a deal, fulfill all commitments made to the investor(s), obligations to the bank, and all compliance requirements.

SERVICE COORDINATION MODELS AND SUSTAINABILITY

Tuesday, January 25th from 3:00-4:00 pm Eastern

Presenters:

- Duana Patton, CEO, Ohio District 5 Area Agency on Aging, and Board Member, Ohio Association of Area Agencies on Aging
- Joseph Recchie, CEO, Community Building Partners and Praxia Partners
- Justin Moor, Vice President of Planning and Program Development, Area Office on Aging of Northwestern Ohio
- Calvin Thomas, Vice President, Accord Management

Stakeholders from housing and community development and aging services explored ways to provide service coordination in multifamily housing settings through housing and service network partnerships. The session featured one strategy for braiding funding for sustainable service coordination and home and community-based services.

- Service coordination is a function. The position title may vary, but at its core, the function is an active and ongoing process to assist individuals to get the services and support that they need. Effectiveness is rooted in strong relationships with residents and community service providers.
- Service coordination benefits all stakeholders.
 - Residents have someone “who has their back,” can coordinate with medical and transportation services, and interpret bills. They get referrals to supports that can avert premature moves to nursing facilities or help resolve problems that could result in possible eviction.
 - Property managers and owners gain a professional who is onsite, can be a more neutral mediator, and assist residents. Service coordinators can help residents make sure rent and utilities are paid.
 - Community-based organizations (CBOs) with service provision contracts can obtain revenue that enables them to extend how they serve the community.
 - Investors benefit from enhanced project viability and sustainability.

It can be challenging to fund service coordination, but solutions exist.

- Negotiating service coordination long-term funding as part of the development process. A small amount is permissible through mortgage tax credits. Developer fees can augment, and as a result, investors may pay from 50-90 percent of service coordination fees by allowing it to be paid from the developer fee and therefore added to the basis of the property.
 - CBOs can secure this funding by negotiating with developers before agreeing to sponsor a project. They need to have a MOU ready stipulating intent for a long-term contract regarding service coordination that sets standards and fees indexed for inflation. A contract needs to be put in place at the earliest possible time after the conditional award of credits in order to maintain integrity in the representations to the public bodies.
 - CBOs first need to get their board of directors educated, then reach out to developers of affordable housing to convey interest in being a service partner, development partner, or having an ownership stake. This soft marketing is low cost but effective.
- Securing reimbursement from insurance carriers, managed care organizations (MCOs), Medicaid, and Medicare. Ohio District 5 Area Agency on Aging had its service coordinators certified as community health workers (CHWs), which enabled this CBO to contract with its regional Pathways Community HUB for care coordination. HUBs refer people to the AAA, which receives a payment when CHWs help clients complete a pathway to reach a goal. A range of payers participate in the HUBs.
- Pursuing local funding for housing and services, such as grants, business sponsorships, and government tax levies. Although the amounts may be smaller than the prior two sources, they can help close funding gaps.

CROSS-SECTOR PARTNERSHIPS TO EXPAND OPTIONS FOR AFFORDABLE, ACCESSIBLE HOUSING

Thursday, February 10 from 3:00-4:00 pm Eastern

Presenters:

- Justin Moor, Vice President of Planning and Program Development, Area Office on Aging of Northwestern Ohio
- Ash Lemons, Associate Director, The Ability Center of Greater Toledo

Stakeholders from housing and community development and aging services discussed partnerships with health care entities and others to address the need for accessible and affordable housing. The collaboration included home modifications, assistive technologies, and a new joint housing locator.

- Assistance with housing and transportation are foremost priorities for both the Area Agency on Aging (AAA) and Center for Independent Living (CIL). The populations they serve have similar housing concerns, and both deliver person-centered services and supports for community living. By collaborating in three areas, these CBOs have enhanced how they fulfill their missions.
- Home Modifications and Transitions to Community: The partners collaborate to make existing housing more accessible to persons with disabilities, including individuals transitioning from hospitals or nursing homes back to the community.
 - With initial funding, the partnership purchased three ramp systems, which can be removed and reused. Many more have been purchased.
 - With local donors and a grant from the state designated assistive technology agency, The Ability Center provides durable medical equipment to individuals. All donated equipment is serviced, sanitized, and inventoried before offered to the community. Top requests are shower transfer benches, shower chairs, wheelchairs, raised toilet seats, and rollators.
 - Home modifications to improve accessibility and safety in the home, such as stairlifts, grab bars and handrails.
 - An effective method towards preventing accommodation delays is to include a Fair Housing Act citation on your landlord agreement forms. This provides both the Landlord and Tenant with an opportunity to self-educate.
 - Funding sources for these activities and equipment include: home modification funds in the Older Americans Act, state assistive technology program grants, community development block grants, and private donations, among others.
- Housing Search Assistance Tool: The partners developed their own [online housing search tool](#) because other online search forms often had incomplete or outdated information, or gaps in their listings. A full-time housing navigator that serves both organizations develops and maintains the database, which is a time intensive activity. The database investment is offset by providing results that are more tailored to individuals' needs and preferences, thus supporting a more efficient search process. The partners pooled multiple funding sources to support this.
- Advocating for Rights and Equity for People with Disabilities and Older Adults: Together, the partners successfully advocated for a ban on source-of-income discrimination to increase acceptance of housing vouchers in Toledo. Because of their advocacy, essential bus services were restored after being cut. Other issues include

local zoning, visitability standards, and reasonable accommodations. Currently, they are advocating that local officials use American Rescue Plan funding to build affordable housing.

- To expand the availability of affordable, accessible housing:
 - The Ability Center has partnered with the local housing authority to obtain vouchers for clients. It also published two booklets to support affordable, accessible housing. [The Rights of People with Disabilities in Inclusive Neighborhoods](#) and [Vital Connections: Civil Rights and Public Policy Affecting People with Disabilities in Pursuing Inclusive, Accessible Transportation](#).
 - Area Office on Aging of Northwestern Ohio worked with a variety of partners to develop four multifamily housing developments for older adults. Some are located on a service-rich campus with Veterans Administration clinic, a senior center, and more.
- To improve access to home and community-based services that individuals choose and want:
 - The AAA obtained contracts for service provision with four payers: Medicaid waiver services, the state Medicare-Medicaid plan, Medicare Advantage plan, and a commercial plan.
 - The CIL was a transition coordinator for the Money Follows the Person program.
 - Together they created a [transportation search](#) tool because transportation is key to housing that makes community living accessible and affordable.

HELPFUL LINKS

[Housing and Services Resource Center](#) (email is hsrc@acl.hhs.gov)

[Aging and Disability Networks](#)

[Protection and Advocacy and Community Assistance Programs](#)

[State Assistive Technology Programs](#)