

# U.S. – Japan Aging in Place Bilateral Program

## Case Studies



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## Case Studies

1. Creating New Developments With Amenities Designed for Seniors
  - *Long Beach Senior Arts Colony (Long Beach, CA)*
2. Investing in Walkable Communities in Support Aging in Place
  - *The Hodge on 7<sup>th</sup> (Washington, DC)*
3. Converting Subsidized Residences into Assisted Living Units
  - *Bernardine Assisted Living (Syracuse, NY)*
4. Renovating Public Housing With Public & Private Investment
  - *The Ella and The Reed at Encore (Tampa, FL)*

## Key Takeaways

1. Good design and high-quality amenities are possible in affordable senior housing developments and can help make a positive impact in revitalizing neighborhoods.
2. Strategies for creating and preserving senior housing in gentrifying communities is an important strategy to help low- and moderate-income seniors stay in their community.
3. Subsidized housing that has served as “naturally occurring retirement communities” (NORCs) can be re-positioned as assisted living to support aging in place.
4. Redevelopment of public housing can be an effective way to create livable, walkable communities for low- and moderate-income seniors.

# Long Beach Senior Arts Colony (Long Beach, CA)



**Exterior Courtyard**  
Primary courtyard with community center focal point. Sustainable landscaping highlighted.  
**Photo Credit:** Tom Bonner

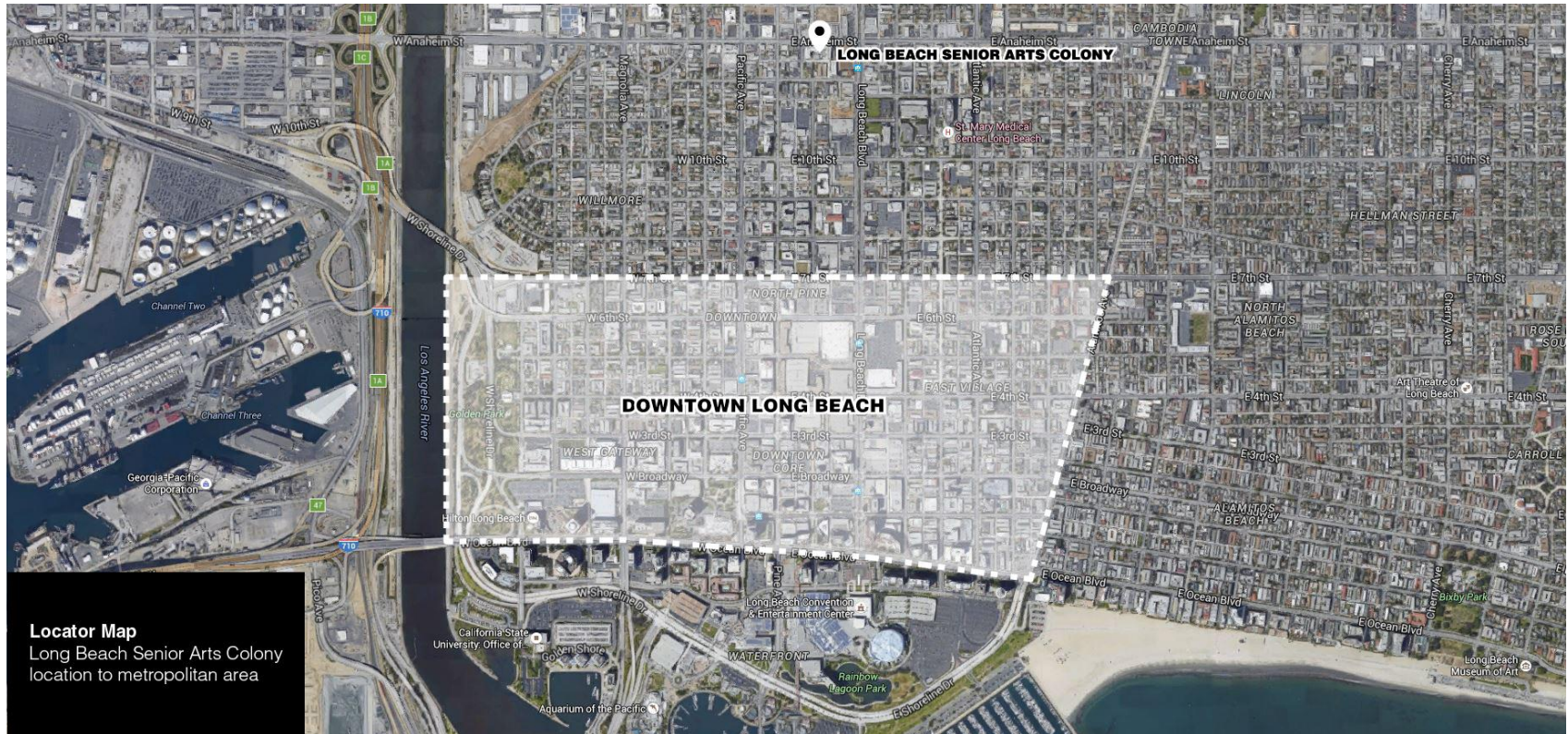
# Long Beach Senior Arts Colony

## Overview

- Constructed in 2013
- Affordable at or below 60% AMI (~\$37,680)
- 200 units:
  - Studios: 37
  - 1 BR: 106
  - 2 BR: 56
- Rents between \$600-\$1,083
- Transit-oriented, walkable neighborhood
- Unique design features and amenities
- Catalyst for community building and revitalization



## Long Beach Senior Arts ColonyLocation



# Long Beach Senior Arts Colony

## Services and Amenities

### Amenities:

- Art studios and gallery
- 99-seat theatre
- Community room, library, and computer lab
- Billiard room
- Spa, yoga and fitness facilities
- Community garden, barbecue areas, dog park

### Programs:

- Art classes, theatrical productions in collaboration with Long Beach Unified School District
- Nutrition and fitness education, fall prevention
- Lifelong Learning: College-level language and technology classes and lectures
- Mentoring, literacy programs and partnerships with local schools and colleges
- Community Building: Resident committees, volunteer opportunities and voter services

# Long Beach Senior Arts Colony (Long Beach, CA)

## Funding Sources

- Total Development Costs: \$56,166,743
- Grants, tax credits and subsidies received from state, city and private sources
  - Wells Fargo Bank
  - California Community Reinvestment Corporation
  - Long Beach Housing Development Corporation
  - FHLB Affordable Housing Program
  - Housing & Community Development Dept. of the State of CA (IIG-TOD)
  - National Equity Fund, Inc.
  - Century Housing
  - California Tax Credit Allocation Committee (CTCAC)
  - California Debt Limit Allocation Committee (CDLAC)



## The Hodge on 7<sup>th</sup> (Washington DC)



Photo: Maxwell MacKenzie, 2014



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## The Hodge on 7<sup>th</sup> (Washington DC)

- Obstacles to Aging in Place in gentrifying neighborhoods:
  - A lack of affordable and appropriate housing options
  - Few opportunities for walking, bicycling, or other forms of physical activity
  - Inadequate mobility options, more generally
  - Insufficient access to services and amenities
- Critical to create and sustain “walkable and livable communities”
  - Housing options within walking distance of basic amenities
  - Land use plans & zoning codes that encourage mixed-use, mixed-income communities
  - Policies that stem the tide of displacement in walkable neighborhoods



# The Hodge on 7<sup>th</sup> (Washington DC)

## Overview

- Completed in 2014
- 90-unit rental housing building affordable to low-income seniors (55+)
  - 18 units affordable at 50% AMI (\$38,650)
  - 72 units affordable at 60% AMI (\$46,380)
- Part of a larger project, City Market at O
  - Existing grocery store, surface parking lots
  - Gentrifying Shaw neighborhood

# The Hodge on 7<sup>th</sup> (Washington DC)

## Partners

Roadside Development (mixed-use developer)

Dantes Partners (affordable housing developer)

3 mayoral administrations

Community engagement

# The Hodge on 7<sup>th</sup> (Washington DC)

## Existing Resources

Preservation of Giant grocery store



Photo: Roadside Development



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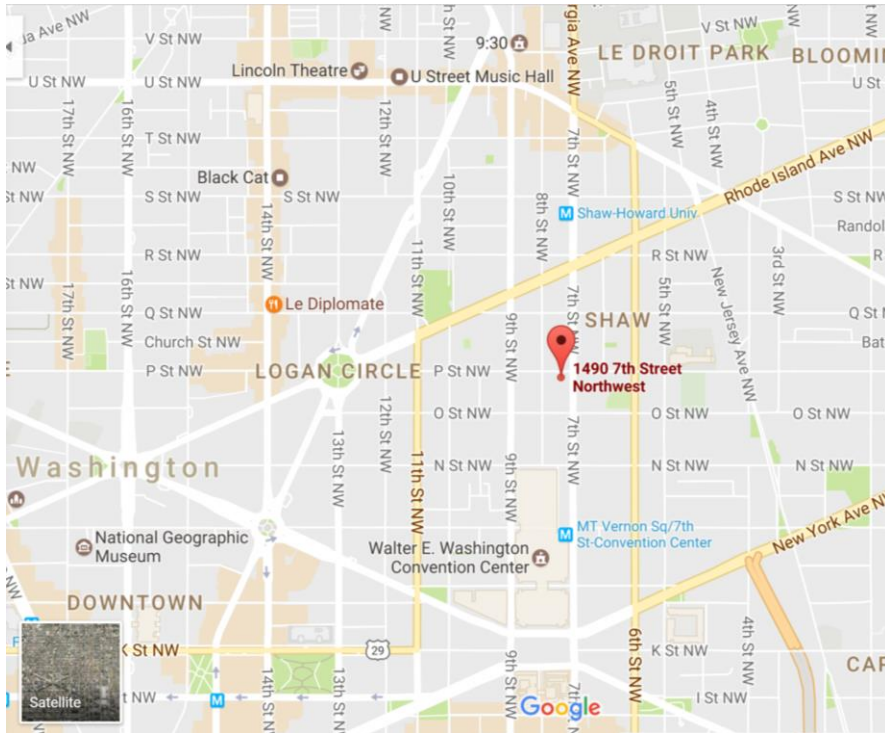
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# The Hodge on 7<sup>th</sup> (Washington DC)

## Existing Resources

Existing walkable neighborhood



# The Hodge on 7<sup>th</sup> (Washington DC)

## Transportation and Amenities

- Project emphasizes the importance of walking and transit
  - Safe, walkable environment that is appealing to the residents
  - Three blocks from 2 Metro stops and on numerous bus lines
- Project targets *active* seniors – on-site health services limited

Available services and amenities:

- 24-hour fitness center
- WiFi
- Pet-friendly
- 24-hour emergency maintenance
- Away-from-Home services

# The Hodge on 7<sup>th</sup> (Washington DC)

## Funding Sources

Source	Amount
<b>Senior debt</b>	
Senior mortgage	\$6,840,000
Junior loan from sponsor	\$2,408,222
<b>Soft debt</b>	
DHCD - HOME funds	\$6,279,412
<b>Equity</b>	
LIHTC equity	\$11,504,004
Deferred developer fee	\$163,881
<b>Total</b>	<b>\$27,195,519</b>

# Bernardine Assisted Living (Syracuse, NY)



# Bernardine Assisted Living (Syracuse, NY)

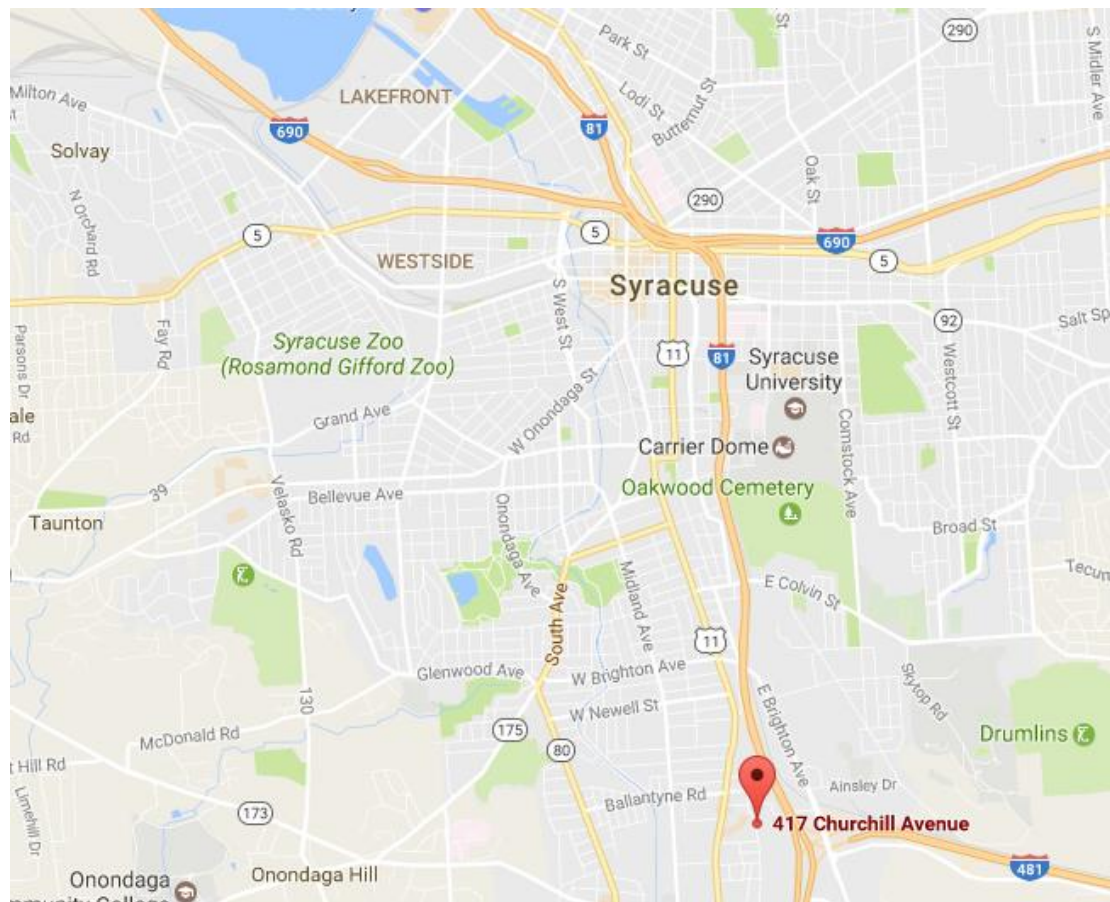
## Overview

- 200+ apartments with on-site care for older seniors
- Assisted Living Conversion Program grantee
  - Converting units in 9 phases into assisted living units
- Specialized programs based on need
  - Enriched Living and Assisted Living
- Managed by Loretto, a nonprofit organization that provides comprehensive healthcare services for older adults in the Central NY region



# Bernardine Assisted Living (Syracuse, NY)

## Location



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# Bernardine Assisted Living (Syracuse, NY)

## Services

### Basic services:

- Meals (escort to dining room, if needed)
- Laundry and housekeeping
- Care management
- Bathing/Dressing/Toilet assistance

### Medical services:

- Medication monitoring
- Glucose monitoring
- Oxygen therapy assistance
- Scheduling and transportation for appointments
- Nursing care 24/7
- Medical alert and emergency response systems
- Safety checks
- Case management



# Bernardine Assisted Living (Syracuse, NY)

## Funding Sources (ALCP)

ALCP Grant Year	Amount	Use
2002	\$ 1,812,927	24 units
2003	\$ 1,087,987	8 units
2004	\$ 1,140,545	9 units + 1 support space
	\$ 746,455	10 units into 9
2005	\$ 746,176	10 units into 8 plus dining room
2006	\$ 497,206	5 units
2007	\$ 3,754,850	35 units into 30
2008	\$ 3,340,323	26 units
2009	\$ 2,544,147	10 units into 9
2010	\$ 8,587,883	39 units
<b>Total</b>	<b>\$24,258,499</b>	

# The Ella and The Reed (Tampa, FL)



# The Ella and The Reed (Tampa, FL)

## Overview

- Demolition of the Central Park Village Public Housing
- Part of the 28-acre mixed-use, mixed-income Encore development
  - 1,500 total housing units
    - Including 318 units of affordable senior housing
  - 180,000 square feet of office space
  - 200 hotel rooms
  - Grocery store
  - Community health center



# The Ella and The Reed (Tampa, FL)

## Overview



## The Ella and The Reed (Tampa, FL)





# The Ella and The Reed (Tampa, FL)

## Overview

- The Ella – 160 units
  - 1 BR: 120 units
  - 2 BR: 40 units
  - Affordable at incomes of between 30 and 70% AMI  
\$12,600 to \$29,400
  - Rents range from \$383-\$712 (1BR), \$402-\$858 (2BR)

# The Ella and The Reed (Tampa, FL)

## Partners

- Tampa Housing Authority
- Bank of America Community Development Corporation
- Choice Neighborhood program
- Neighborhood Stabilization Program
- Local government agencies
- Private sector developers

# The Ella and The Reed (Tampa, FL)

## Funding Sources (The Ella)

The Ella	Construction	Permanent
<b>Debt</b>		
Bank of America/Freddie Mac tax-exempt bonds	\$2,900,000	\$2,900,000
Bank of America – short-term bond	\$9,370,000	
<b>Equity and Grants</b>		
Bank of America - LIHTC (4%)	\$244,108	\$7,790,085
HUD Replacement Housing Factor Grant	\$4,946,299	\$4,946,299
HUD and Tampa Housing Authority - NSP 2	\$2,250,000	\$2,250,000
HUD and City of Tampa - NSP 1	\$1,000,000	\$1,000,000
Tampa Housing Authority - land note	\$1,600,000	\$1,600,000
Tampa Housing Authority - member note		\$824,023
City of Tampa - HOME	\$2,500,000	\$2,500,000
Federal Home Loan Bank of SF, Affordable Housing Program		\$1,000,000
Brownfield rebate	\$396,973	\$396,973
Deferred developer fee	\$200,000	\$200,000
<b>Total</b>	<b>\$25,407,380</b>	<b>\$25,407,380</b>



# The Ella and The Reed (Tampa, FL)

## Funding Sources (The Reed)

<b>The Reed</b>	<b>Construction</b>	<b>Permanent</b>
<b>Debt</b>		
Bank of American construction loan	\$16,302,573	
Oak Grove Capital – permanent loan		\$3,800,000
<b>Equity and Grants</b>		
Bank of America - LIHTC (9%)	\$8,173,359	\$20,675,932
HUD Replacement Housing Factor Grant	\$2,191,747	\$2,191,747
Tampa Housing Authority - land note	\$1,570,000	\$1,570,000
Tampa Housing Authority - member note	\$1,998,710	\$1,998,709
City of Tampa	\$100,000	\$100,000
Brownfield rebate	\$441,461	\$441,461
Deferred developer fee	\$235,000	\$235,000
<b>Total</b>	<b>\$31,012,850</b>	<b>\$31,012,849</b>