

2020 EMBRACING TRANSFORMATION
FINANCIAL MANAGEMENT CONFERENCE

Emerging Revenue Models for Resident Services

Wednesday, October 28, 3.30 - 5.00 ET

STRENGTHMATTERS®

Panel Participants

- Bob Simpson, Simpson Impact Investments
- Alia Pacombe, Urban Edge
- Ken White, NHP Foundation
- Trevor Samios, Winn Management
- Joan Tally, Morgan Stanley



Questions

- All participant lines are muted.
- Please use the **Raise Hand** feature if you would like to speak.
 - The Raise Hand feature is located in the Participant panel.
- You may also use the **Chat** feature to ask questions.

Continuing Professional Education Requirements for CPAs

- **Polls are Required for CPEs**
 - If you are seeking CPE credits, please submit ALL polls and the conference evaluations.
- We use **Polls and the Zoom attendance record** to verify participation throughout the webinar.
 - **Participants must submit ALL polls and be logged in no later than 10 minutes after the scheduled session start time to receive a certificate.**

Continuing Professional Education Credits (CPEs) for CPAs

- You may request a certificate of completion via the conference evaluations.
 - Links to the evaluations are emailed to all registrants.
- For more information on CPE credits, contact Lindsay Wells at consult.lwells@gmail.com.

Important note on COVID-19 and CPEs

- We are part of the NASBA Registry of CPE Sponsors for Group Live programs, which covers in-person events.
- **Due to the COVID-19 crisis, NASBA has provided a temporary allowance for Group Live Sponsors to convert typically in-person programs to virtual delivery.**
- As always, state boards of accountancy have discretion regarding CPE credit acceptance. **Two states have indicated they will not extend this flexibility (Kansas and New York).**
- For details on state board responses, please check the [CPE Info page](#) of the registration site or email consult.lwells@gmail.com.



PEOPLE

connected COMMUNITIES™

By WinnCompanies

One of the nation's largest providers of resident services in affordable, military, workforce, mixed-income and market-rate housing for over four decades, WinnCompanies believes in its obligation to the quality of life in the communities we serve.



PLACE

In 2017, WinnCompanies launched **Connected Communities**, a collective impact approach to true community development. Focusing on People, Place and Partnership, Connected Communities supports our community teams, residents, partnerships and clients across the nation to develop collaborative strategies that drive positive outcomes for the 350,000 residents who call our communities home.



PARTNERSHIP

Connected Communities partners with more than 500 national organizations and 1,000 local and regional service providers nationwide to **Connect our Communities to Opportunity with measurable results.**

OUR CAPACITY

- **Mission:** Connecting Communities to Opportunity
- **Team:** 161 committed, experienced community development leaders working in 22 states and the District of Columbia serving over 300,000 residents each year across 600 communities.
- **Experience:** 40+ years of Resident Services experience, from pre-development to stabilization across all affordable and mixed-income program types and investor compliance.
- **Partners:** 1500+ organizations nationally connected through MOUs and linkage agreements and focused on collective impact.
- **Core Services:** 40 CORE programs offered in every community where we provide on-site services.
- **Outcomes:** Committed to data-driven impact for each community, measuring 100+ indicators for each household we serve.
- **Innovative, Specialized Services:** National pilot programs including HUD Family Self-Sufficiency, Facilities Apprenticeship Program, Senior Skilled Nursing, Employee-Run EITC, Credit Reporting, and Voter Registration.
- **CORES Certified:** 1st for-profit organization to be Fannie Mae and SAHF-certified for “robust commitment, capacity and competency in providing outcomes-focused resident services in affordable rental housing.”
- **Technology:** CONNECT, our innovative outcomes-tracking platform manages workflow, program management, closed-loop referrals, resident assessments, and customizable reporting to help our clients, communities, partners and investors understand efforts and outcomes.



OUR FOCUS



**COMMUNITY
ENGAGEMENT**



**ECONOMIC
MOBILITY**



EDUCATION



EMPLOYMENT



HEALTH



HOUSING

OUR APPROACH



Navigation History

You have referred ShiPing to 4 programs.

Referrals and Notes

START A REFERRAL ADD NOTE

- Note made by Bao Zhu Cen** 5/13/20
Request weekly benefits payment
- Note made by Neilson Lam** 5/07/20
Pandemic Unemployment Assistance Inquiry
- Note made by Bao Zhu Cen** 5/05/20
Sign up for Fresh Truck free box screening
- Referral to Fresh Truck - Mobile Market by Fresh Truck**
Status: got help
Referred by: Bao Zhu C (Connected Communities) 5/05/20
- Referral to Pandemic Unemployment Assistance by Massachusetts Division Of Unemployment Assistance (DUA)**
Status: got help
Referred by: Neilson L (Connected Communities) 4/22/20
- Referral to Health Support Program by CharlesNewtown - WinnResidential**
Status: got help
Referred by: Bao Zhu C (Connected Communities) 4/08/20
- Referral to Unemployment Insurance Benefits by Massachusetts Division Of Unemployment Assistance (DUA)**
Status: not eligible
Referred by: Neilson L (Connected Communities) 4/08/20

Personal Info

India Scott
Name

lahah@winnoo.com
Email Address

(202) 439-5168
Phone Number

yardi-yardi-WinnResidential-0067-t0066975-India-Scott-1988-02-18
AB Resident ID

4317 3rd St. S.E. #304
Address 1

Washington
City

02/18/1988
Date of Birth

Yes
Head of Household

\$5,000 - \$9,999
Household Income

11/25/2009
Move-In Date

11/01/2019
Recertification Date

DC
State

4317-304
Unit Number

20032
Zip code

EDIT PERSONAL INFO

Child 1 (0-5yrs): Does s/he attend a childcare center, preschool, pre-K, or Head Start program? *
If no, type NA. If yes, type where.

- Yes
- No
- NA or resident opts out of this question

If Yes, where? *
Hendley Elementary

Forms

Screening Application for Fresh Truck - Mobile Market Program
May 5, 2020

VIEW

START A FORM

WISH Program

by Community Housing Council Of Fresno

The Community Housing Council is committed to strengthening local public and private partnerships to ensure adequate, affordable and equitable housing opportunities for low-to-moderate income.

- Main Services: help find housing , help pay for housing , housing advice
- Other Services: more education
- Serving: adults , young adults , seniors , families , low-income

Next Steps:

- Go to the program's website.
- 2.43 miles (serves your local area)
- 2560 W Shaw Ln, Fresno, CA 93711
- Closed Now : See open hours

MORE INFO



SEE NEXT STEPS



Covid-19 Lunch For Kids

by Fourth Presbyterian Church

COVID-19 Response Program
During the unanticipated school closures due to the COVID-19 Pandemic, we will be serving meals to children Summer Meal.

- Main Services: emergency food , meals
- Other Services: food pantry
- Serving: teens , children , covid19 , students

Next Steps:

- Contact or go to the nearest location or schedule on their website
- 2.94 miles (serves your local area)
- 340 Dorchester Street, Boston, MA 02127
- Closed Now : See open hours

MORE INFO



SCHEDULE ON THEIR SITE



Are you able to help Lehua?

We reached out, we'll try to help!

We referred them elsewhere

They aren't eligible

We couldn't reach them

We don't have capacity

Economic Mobility

We're working to bring new resources to the community to provide residents with better opportunities to build credit, get access to benefits and better financial products. These questions help us understand what needs or interests folks might have.

Do you currently have the following (Check all that apply) *

- Savings account
- Checking account
- Credit card
- Automatic deposit of a paycheck into a bank account
- Retirement savings
- None of the above

Have you seen your credit report in the past year? *

- Yes
- No

In the past year, have you experienced any of the following (check all that apply).*

- Overdraft fees from your bank
- Credit card late fees
- Rent to own (furniture, electronics, etc.)
- Payday loans
- Check cashing
- Loans from family or friends
- ATM fees
- Having bills in collection
- NA or Resident opts out

- | | | |
|-----------------------|--------------------|---------------|
| English | Gujarati | Pashto |
| Afrikaans | Haitian Creole | Persian |
| Albanian | Hausa | Polish |
| Amharic | Hawaiian | Portuguese |
| Arabic | Hebrew | Punjabi |
| Armenian | Hindi | Romanian |
| Azerbaijani | Hmong | Russian |
| Basque | Hungarian | Samoan |
| Belarusian | Indonesian | Scotts Gaelic |
| Bengali | Igbo | Serbian |
| Bosnian | Italian | Seotho |
| Bulgarian | Japanese | Shona |
| Catalan | Kannada | Sinhala |
| Cebuano | Kazakh | Slovak |
| Chichewa | Khmer | Slovenian |
| Chinese (Simplified) | Korean | Somali |
| Chinese (Traditional) | Kurdish (Kurmanji) | Spanish |
| Corsican | Kyrgyz | Sundanese |
| Croatian | Lao | Swedish |
| Czech | Latin | Tajik |
| Danish | Lavian | Tamil |
| Dutch | Lithuanian | Telugu |
| Esperanto | Malayalam | Thai |
| Estonian | Malay | Turkish |
| Filipino | Malayalam | Ukrainian |
| Finnish | Maltese | Urdu |
| French | Marathi | Uzbek |
| Frisian | Marathi | Vietnamese |
| Galician | Mongolian | Welsh |
| Georgian | Myanmar (Burmese) | Xhosa |
| German | Nepali | Yiddish |
| Greek | Norwegian | Yoruba |
| | | Zulu |

OUR IMPACT in 2020



Over 100,000 residents have participated in more than one Community Program or Event in the past year



74% of school-aged children are enrolled in an after-school program.



17% drop in households reporting visits to the Emergency Room and hospitalizations more than once annually in supportive housing.



36% of Residents identified a difficulty paying bills and experience more than one economic hardship each year. 79% have been assisted with rent, benefits or unemployment assistance so far in 2020.



Coordinated over \$3 million in CARES Act rent support for individuals and families facing financial hardship throughout COVID-19.



61% of non-student, work-eligible young adult Residents are working or enrolled in a workforce development or apprenticeship program.

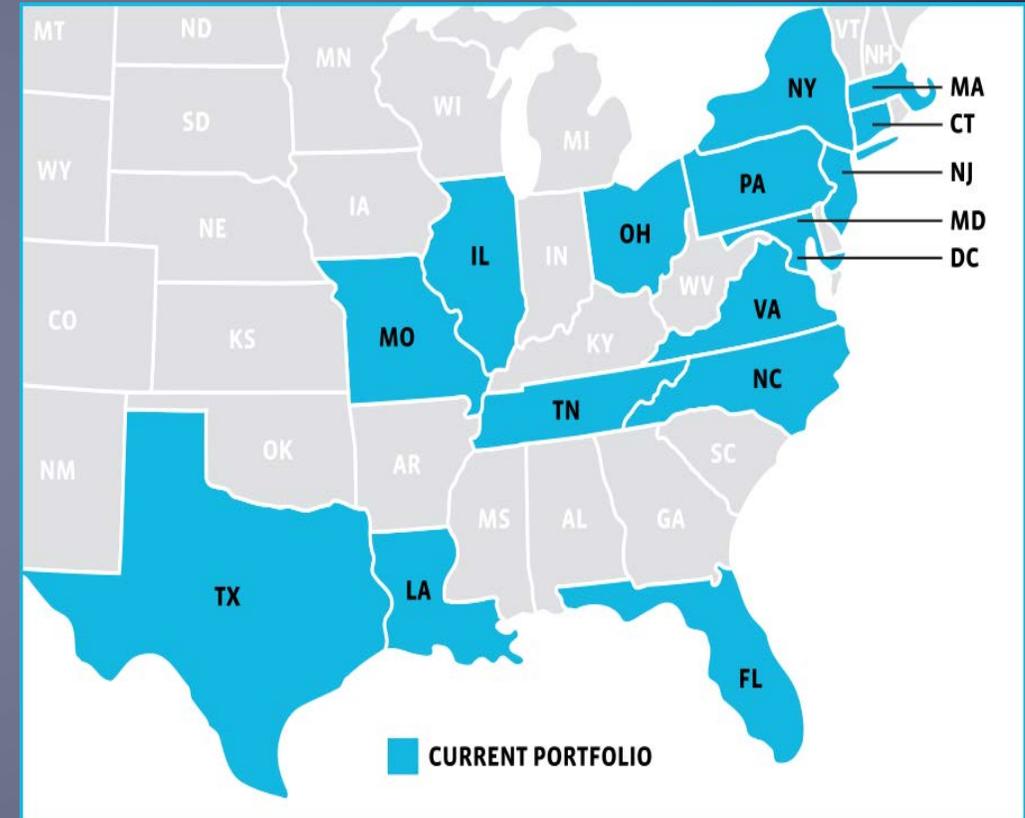


Operation Pathways & Social Health Bridge

Partners in Healthier Living

The NHP Foundation & Operation Pathways

- › Approximately 57 multi-family and senior properties in 15 states and the District of Columbia
- › *OP provides resident services in approximately 50% of NHPF properties.*
- › *On-site Resident Service Coordinators hired by third-party property management but supervised by Operation Pathways*
- › *Case management and coaching and supervising service provider partners*
- › *Resident Services Cost per Unit is \$340 annually*



Social Health Bridge



Social Health
BRIDGE™

- A subsidiary of Centene Corporation – one of the largest Medicaid managed care organizations in the U.S.
- Created to help community-based organizations and healthcare entities work more efficiently to address SDOH.
- NHPF/Operation Pathways became its first community partner in December 2019.
- About 25% of households had Medicare plan managed by Centene's affiliate in LA – Louisiana Healthcare Connections.



The Work

- › Targeted Health Interventions
 - Post-hospitalization wellness checks
 - Reminding residents who are due for screenings, immunizations, etc.
 - Wellness checks on residents with chronic conditions
 - Wellness checks on new mothers and infants
- › Social Health Bridge Resources and Health Partners
 - Louisiana Healthcare Connections
 - DePaul Community Health Center
 - The Carpenter Health Network
 - New Orleans East Hospital
 - Aunt Bertha Platform – socialhealthbridge.auntbertha.com
- › Operation Pathways' Programs & Services
 - Resident Engagement
 - Family Centered Coaching/Service Coordination
 - Afterschool and Summer Camp Programs
 - Financial Capabilities
 - Workforce Development

The Business Model

- › The assumption here is that these targeted interventions improve health outcomes and keep individuals from utilizing high cost healthcare services
- › In our pilot, Operation Pathways is receiving a fee from Social Health Bridge, plus additional funding for increasing staff
- › In theory, some of the cost savings are passed down to us for our work in SDOH.
- › Not sustainable as a business model in the long run without state-approved MCOs working together.



Who We Are

- 46 year-old CDC
- Develop affordable housing in Boston
- Own 1,300+ unites of housing & 100,000+ sq. ft. commercial, community space
- Provides supportive services for Boston's families

Who Lives In the Neighborhood

- Median household income is \$27,051
- 34.5% of families live below poverty level and 15% are unemployed
- 89% people of color and 25% young people



SERVICES OFFERED/2019 OUTCOMES

- **Eviction Prevention:** 168 UE families avoided eviction, saving UE \$427k in losses associated with evictions.
- **Financial Counseling:** 103 families counseled on financial capability.
- **VITA(Volunteer Income Tax Assistance) :** 534 tax returns filed, giving \$1.3M back to tax payers and into the local economy.
- **Strong Start:** 20 families completed Strong Start – School readiness, paired with parenting education.
- **Nurturing Fathers:** 14 fathers graduated 12 week Nurturing Fathers Program.
- **Youth Employment:** 28 youth hired through in partnership with ABCD SummerWorks.
- **Supportive Services:** 1,500 received tangible support items (back to school supplies and holiday gifts).

STAFF STRUCTURE:

Urban Edge provides the “resident services” and Winn manages the property.

We have monthly meetings with property management as part of the eviction prevention program.

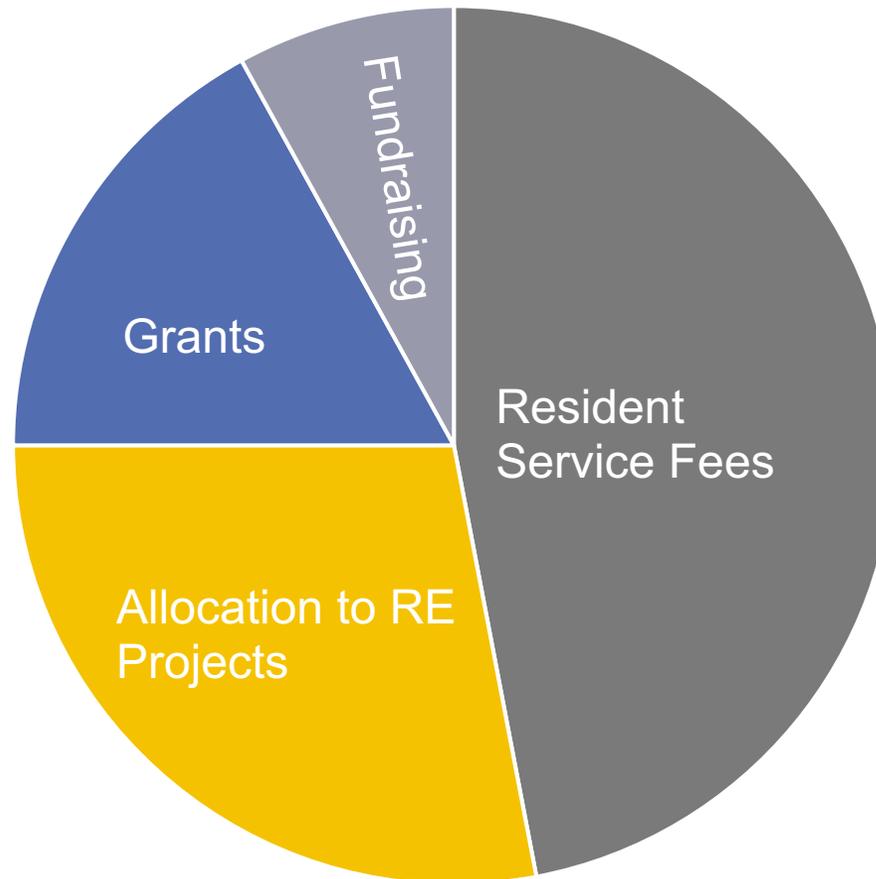
Community Engagement Officers work closely with management on any resident related matters.

- 6 Community Engagement staff (Director, Associate Director and 4 Community Engagement Officers)
- 1 Community Engagement Officer for about 300 units + a “specialty program” like Strong Start.
- Highly certified staff: Certified Occupancy Specialist, Certified Financial Coaches by NeighborWorks, Certified Community Health Worker & Certified Hoarding Specialist.



VALUE STRUCTURE

- Resident Service Fees to UE under individual contracts with most fees above the line and some subject to cash flow
- Resident Service staff allocated to real estate development projects
- Grants
- Fundraising





THANK YOU!

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