**Tab 1: Narrative Description of the Project**

**General Description**

Witherspoon Senior Apartments (WSA), is located in the **Kingsessing neighborhood** of South west Philadelphia at 2050 S 58th Street. **Presbys Inspired Life, a non profit developer is the sponsor and property manager** of the proposed project and owns the 8 acre campus on which this site is located. The campus is spread over almost the whole city block and includes 4 properties. Three of the four properties are HUD 202 financed senior buildings with PRAC subsidies and 100% occupancy. There is a **waitlist of over a 150 seniors** for these buildings. The fourth building was built 15 years ago and operated for almost 10 years as a nursing home. It had to be closed in 2011 after many years of rising medical and operational costs, as well as declining reimbursements. The project involves the **adaptive reuse of this vacant building and converting it into 60 senior apartments. This application to the PHA is to request ACC subsidy for 45 of the 60 units.** An application to the PHA has been submitted for PBV vouchers for the remaining 15 units.

10% of the units (6 units) are handicap accessible. These units are approximately 640 sft in size. 4% of the units will be set aside for individuals with sensory impairments. An additional 10% of the units will be set aside for special needs population- persons with HIV/AIDS. The referrals for these individuals will come from the city’s Office of Supportive Housing.

**Owner/Ownership**

Philadelphia Presbytery Homes and Services for the Aging, Inc. (d/b/a Presby’s Inspired Life) has long worked in the Philadelphia region to provide housing and supportive services to seniors. In 1954, the Presbytery of Philadelphia established a committee to provide quality housing for 14 elderly persons displaced by the Commonwealth’s closing of their previous residence. The following year, the Presbytery formed a corporation that later was to become known as Philadelphia Presbytery Homes, Inc. (PPH), which in 1995 formed the corporation Philadelphia Presbytery Homes and Services for the Aging Inc. (PPHSA) to further its work, making this the organization’s 59th year in existence. Doing business as Presby’s Inspired Life, PPHSA has been a successful developer and manager of thousands of units throughout the Greater Philadelphia Area.

For nearly 60 years Presby’s Inspired Life (PIL) has provided quality senior living environments in the greater Philadelphia area. Today, Presby’s Inspired Life is a regional leader in senior living, providing continuing care and affordable housing to more than 3,000 residents in 31 communities through the dedicated, compassionate work of nearly 1,100 employees. The mission of the organization, from its beginnings, has been to provide exceptional communities and care for individuals representing a broad range of backgrounds, physical abilities and economic circumstances. Presby’s goal is to provide opportunities for all residents to continue to engage in what life has to offer to the extent they are able. A diverse, volunteer board of directors, chosen for their expertise and ability to represent the community’s interests, oversees Presby.

The General Partner Entity is a yet to be formed entity. Like in a typical tax credit structure, the GP will be solely owned and controlled by the non profit developer, sponsor and manager for this project- Philadelphia Presbytery Homes and Services for the Aging (PPHSA). PPHSA is a 501c3 non profit organization.

**Financing Structure**

Through the development of Witherspoon Senior Apartments, Presby is able to continue its mission to provide quality, affordable housing to low-income seniors. Presby has developed a funding plan that combines public and private resources. The proposed funding for the Witherspoon Senior Apartments includes $13,648,635 in equity raised by the sale of 9% LIHTC, potentially $1,500,000 in funding from the OHCD, a $1,200,000 loan from Presbys, $450,826 in deferred developer fee from Presbys and potentially the operating subsidy from the PHA. The project will apply for LIHTC in January, 2015 and for the OHCD funds in November, 2014. With such enormous financial commitment from Presbys, **the non profit shows its faith in the project and its commitment to serving the low income seniors in this neighborhood**. Presbys realizes the great need for housing and is dedicated to help.

**Special Features/Preferences**

The existing vacant nursing home will be **rehabilitated and a two-story new construction addition** added to the structure to create a total of **60 units of affordable housing for seniors**. The total building will be approximately 69,970 sf. All units will have one bedroom and one bathroom and will range from 575sf to 640sf. The building also includes a lobby, a reception area, management office, laundry room, recycling, large community room with kitchen, casual lounge areas, and an outdoor terrace and garden. There will also be room for resident storage, computer rooms, wellness and socialization room and a reading room.

The project will also feature **visits from the local health care professionals routinely**, such as a general physician and Mercy Home Health Services. They will do blood pressure checks, administer flu vaccines etc. The seniors will have available access to **local Community Supported Agriculture (CSA)**. The CSA will be managed by the Penn State Agriculture Department. The Penn State representatives come every Wednesday to the campus to help the seniors with their vegetables. The campus on which the property is located is a **smoke free campus**. There is a **walking club** that operates in one of the existing senior buildings and the seniors will have the choice to either join that club or create their own. The focus will be on giving the seniors an opportunity to live a wholesome life.

The project will serve seniors who are 62 years of age or over and will be designed and services to allow the seniors to age in place.

**Tab 2: Community Resources:**

1. **Proximity to neighborhood amenities:** The surrounding community provides a variety of amenities that serve a senior’s daily needs. Woodland Avenue, which is a block away from the proposed site is the main retail hub in the neighborhood. It is dotted with corner stores, smaller retail outlets, discount stores, pharmacies etc. Some of the amenities are highlighted below:
   1. **Supermarkets:** Save a lot grocery store, located on Woodland Avenue is a block away from the proposed project.
   2. **Pharmacies**: There are three pharmacies within a five block radius of the site
   3. **Health Centers**: There is the Greater Philadelphia Action Alliance on 60th and Woodland Avenue, Philadelphia Health Center on 48th and Woodland and Mercy Philadelphia located on 54th and Cedar Avenue. In addition, there is the Hospital of the University of Pennsylvania and the Veteran’s Hospital three miles away from the site.
   4. **Recreational Spaces**: The Myers Recreational Center is less than a block away from the site.
   5. **Open Spaces and Parks**: The campus on which the proposed site is located, has green, open spaces for the residents. It is 3 blocks from the 700‐acre Cobbs Creek Part—part of the Fairmount Park System—which provides for passive recreation opportunities and other activities for residents to be organized by WSA staff.The Myers Recreational Center has green, open space for the seniors to enjoy as well. In addition, the site is a half mile away from Bartram Gardens.
   6. **Commercial Corridors**: Woodland Avenue is the main commercial strip in this neighborhood. It is located a block away from this site. Chester Avenue offers the other commercial corridor and is also a block away from this site.
2. **Transportation**: Residents of WSA will benefit from its abundant transportation access. There are two light rail trolley stops within one block of the campus, the route 11 to the south on Woodland Avenue and the route 13 to the north along Chester Avenue. Both routes will provide residents with one‐seat rides into Center City, bringing them to the city’s core within 20 minutes. These routes also run through the rest of West Philadelphia, including University City, providing residents with the ability to visit friends in the area or audit courses at the local universities. In addition, the route G bus stops right at the campus’ gate and can bring residents into the heart of South Philadelphia, including the entertainment opportunities offered at the sports stadiums and access to big box retail offerings such as Target, Lowes, Raymour and Flanagan, and Radio Shack, and apparel stores including Marshall’s and Modell’s. This route also connects to the Overbrook regional rail station, allowing for easy transportation throughout the greater Philadelphia region. Also, the Cobbs Creek Parkway bike trail abuts our campus making it easily accessible for any residents who want to go biking.
3. **Accordance with the City and Local Plan:**

While the neighborhood benefits from many amenities, several others are planned and will further assist residents in meeting their daily needs and providing for a high quality of life. The Woodland Avenue commercial corridor has been highlighted by the University Southwest District Plan as an area for targeted improvement. The commercial corridor could benefit from the growth of the University of the Sciences of Philadelphia (USP) campus, as well as from the Schuylkill River Trail expansion. The District Plan also calls for program management and beautification of the retail of the corridor. With the goal of revitalization in mind, the district plan calls for creating a targeted zone for OHCD’s basic system repair program in the Kingsessing neighborhood to help residents maintain their homes. The project will benefit from many of the commercial and residential improvement initiatives outlined in the University Southwest District Plan. In turn, the development of Witherspoon Senior Apartments will also contribute to the goals and objectives of the THRIVE initiatives detailed in the District Plan, particularly the need for new senior housing and new investment in the southwest portion of the district.

Woodland Avenue has also been designated as a “Core Retail Area” in the Southwest CDC Development Strategy for the Woodland Avenue Revitalization Project. The plan establishes Woodland Avenue between 56th and 68th Streets as an area to provide a cleaner and more appealing shopping environment via a variety of initiatives. The plan foresees new, large‐scale retail development occurring in an incremental basis along this stretch of Woodland Avenue. Southwest CDC, a supporter of the Witherspoon Senior Apartments development, aims to improve the quality of life in Southwest Philadelphia through economic development and supportive services, and is one of the city’s Neighborhood Community Advisory Committee program leaders, promoting civic participation and working to engage residents in activities that support the City’s core objectives, including providing decent and affordable housing through new housing, preservation of existing housing and mortgage foreclosure prevention programs.

The Witherspoon project also contributes to the Philadelphia Housing Authority’s “6 in 5” initiative. Through this initiative PHA intends to partner with qualified non profit and for profit partners to develop 6,000 units of affordable housing in five years. The housing can be new construction, rehabilitation of existing housing, acquisition or preservation. Some of this housing could be public housing. The Witherspoon project will meet this goal and meet the diverse need of low income housing with operating subsidies in south west Philadelphia.

The Witherspoon project will also help towards meeting Councilman Clarke’s initiative to provide 1,500 units of affordable housing in the next two to three years. A [report by the Urban Institute](http://www.urban.org/housingaffordability/) concluded that as of 2012 Philadelphia had just 37 affordable units for every 100 extremely low-income renter households. This number was just 11 without the help of federal housing assistance. The share of affordable housing available in Philadelphia without federal aid has diminished by more than half since 2000. Kingsessing has a great need for affordable housing and the Witherspoon project will meet that need.

1. **Located in Area of Revitalization:**

The project is in an area certified as blighted by the Philadelphia Redevelopment Authority (PRA). A copy of the Blight Certification for Kingsessing approved by the PRA is attached.

1. **Proximity to Job Centers or Employment Resources**

The project due to its proximity to retail and commerce, healthcare providers and hospitals, recreation centers and supermarkets offers the residents proximity to employment opportunities. Being accessible by bus and trolley line helps the residents with their transportation needs and access jobs further away in the city.

**Tab 3: Site and Neighborhood Standards**

The project complies with the Fair Housing Act and Title VI of the Civil Rights Act of 1964. As part of its Affirmative Fair Housing Marketing Plan, Presby, the developer, will make widely known the availability of the housing to be constructed at this location. The neighborhood is predominantly African American. Outreach will be performed to ensure that racial groups underrepresented in the neighborhood know of the availability of the housing. The AFHMP is attached to this tab.

The project is in an area certified as blighted by the Philadelphia Redevelopment Authority (PRA). A copy of the Blight Certification for Kingsessing approved by the PRA is attached.

The developer, Presby, commissioned a market study to determine whether or not there was a need for housing in this area. The Market Study conducted for the project notes that while the population is aging, **no new senior housing has been added to the area’s inventory.** The area includes no identifiable elevator accessible units, and while there are a few properties that include first‐floor accessible apartments for mobility‐impaired seniors, these units charge rents between $790‐850 plus utilities and would not be affordable to most seniors, and certainly not to low income ones. While more affordable rents for one bedroom apartments can be found in converted rowhouses, **many of these units are on the second floor of walk up buildings.** As such, these units are generally not appropriate for seniors who may have mobility problems, or who may not want to move as they age and their physical abilities decline.

**Tab 4: Housing Needs Analysis**

Witherspoon Senior Apartments (WSA) is an ideal development for its location, as it will bring 60 affordable senior‐occupancy units to an area in which there is extremely high demand for low income senior housing. WSA is located in Philadelphia’s Kingsessing neighborhood. The primary market area from which the project will attract tenants includes a whopping **7,805 households that are both age and income qualified**. As the University Southwest District Plan—completed by the Philadelphia Planning Commission in June 2013—shows, this area of the City includes a growing number of seniors. The 32% of senior homeowners in this district compared with 27% citywide is reflective of this.

While the population ages and seeks living accommodations that better meet their needs, housing is not being built to meet this demand. The existing senior housing units in the area are all fully leased, and rent subsidized developments maintain extremely long waiting lists. On the campus of senior residential living on which WSA will be built, the other three affordable senior housing buildings have more than **150 individuals on the waiting list**. Prospective tenants for these units typically face a wait ranging from 6 months to more than two years before units become available. Meanwhile, there are more than enough households on the campus’ waitlist alone to fill the 60 units that will be built at WSA, even without accounting for the more than 7,800 eligible individuals throughout the market area.

The 60 units at the Witherspoon Senior Apartments would need to capture only 0.7 percent of eligible households to lease fully. As the Baby Boom generation ages throughout Philadelphia, demand for quality affordable senior housing will continue to increase. An analysis of the capture rates for individual income tiers suggests that there is an adequate pool of prospective tenants in each tier.

Please find attached the more detailed housing analysis demonstrating the need for the proposed housing.

**Tab 5: Site/Layout**

1. Please find below the map of the city showing the location of the proposed project.



1. The existing building is a single story structure, designed originally to be a nursing home. The project entails adaptive reuse of the existing building and adding two new floors on top of the existing structure. The overall building will ultimately have 60 units of affordable, senior housing. The total building will be approximately 69,970 sf. All units will have one bedroom and one bathroom and will range from 575sf to 640sf. A more detailed scope of work synopsis is attached to this tab.

Presby, in collaboration with its architect, has taken a holistic approach when considering sustainability in the design of the project, which will meet the City’s and PHFA’s **Energy Star certification** requirements as well as the **Enterprise Green Communities Checklist**. The development is built upon the **adaptive reuse** of an existing building, a former nursing home. The building will be upgraded and repurposed to meet modern-day senior living demands. The location of the building takes advantage of the site’s location, near public transit, which will reduce energy use. A particularly innovative feature of the building is its use of KONE energy-efficient elevators, which use substantially less energy than standard elevators, and are machine room-less. Additional energy saving features and other sustainable elements are detailed below.

Energy Efficiency Features

* Super insulated exterior walls and roof
* Operable windows with low-E coating
* Panelization of exterior walls for less construction waste and superior insulation value
* Recycling of all non-hazardous waste during construction
* All Energy Star appliances
* Efficient boilers
* Programmable thermostats in each apartment unit, with pre-set upper and lower limits
* Low flow plumbing fixtures
* Compact fluorescent bulbs in all permanent light fixtures
* Low VOC paints, finishes, sealants, caulking, adhesives
* Carpet manufactured from at least 25% recycled materials
* Highly efficient warm air dryers replace paper towel dispensers and paper towels.
* The ceiling tiles will have a greater than 50% recycled content.

Sustainable Development Features of the Site

* The construction of the building involves the adaptive reuse of an existing, vacant building.
* The building is close to public transportation, including the bus and train.
* The building is part of an already-developed campus and will involve minimum new earth disturbance

Witherspoon Senior Apartments will also be an asset to the City and its *Greenworks Philadelphia* goals. According to the plan, “Increasing energy-efficiency in Philadelphia is the centerpiece of its sustainability strategy.” By including a number of highly efficient systems into its construction, Witherspoon Senior Apartments will contribute to this key element and further the plan’s proposed initiative to build energy-efficiency into low-income housing.

1. Please find attached the site plan, floor plans and unit plans for the proposed project.
2. There are no existing units in this building. The existing building was designed as a nursing home. There are pictures of the existing nursing home interiors attached here.
3. This is not a scattered site project.

**Tab 6: Project Amenities/Services**

The project will be **100% visitable** and 10% of the units (6 units) will be handicap accessible. 4% of the units will be set aside for individuals with sensory impairments. An additional 10% of the units will be set aside for special needs population- **persons with HIV/AIDS.**

Each unit will be accessed through a common entrance and hallway and the building will include a lobby, reception area, management office, a laundry room on each floor, a large community room with kitchen, casual lounge areas, an outdoor terrace, resident storage, computer rooms, wellness and socialization room, reading room and a dining room.

The project will also feature **visits from the local health care professionals routinely**, such as a general physician and Mercy Home Health Services. They will do blood pressure checks, administer flu vaccines etc.

The seniors will have available access to **local Community Supported Agriculture (CSA)**. The CSA will be managed by the Penn State Agriculture Department. The Penn State representatives come every Wednesday to the campus to help the seniors with their vegetables.

The campus on which the property is located is a **smoke free campus**. There is a **walking club** that operates in one of the existing senior buildings and the seniors will have the choice to either join that club or create their own.

The focus will be on giving the seniors an opportunity to live a wholesome life.

In addition to the above amenities, the project has an **extensive supportive services plan** in place which is described in greater detail under Tab 10. A brief summary of the supportive services is provided below:

Presbys Inspired Life will provide the necessary supportive services. The services will be catered towards seniors who are 62 years of age or older. There are six units being set aside for seniors who are 62 years or older and have HIV/AIDS. The Service Coordinator will work twenty-four (24) hours per week to provide needs assessment and referrals to local senior centers for social programs, meals and supportive services.

* The Service Coordinator will also support resident activities and working with residents to establish a Resident Association.
* The Service Coordinator will provide intensive case management to residents of Witherspoon Apartments in areas of financial assistance, healthcare advocacy, housekeeping services, food services, conflict resolution and others.
* The Supportive Service Coordinator provides counseling services to residents in the areas of conflict resolution, crisis intervention, family support, benefits, insurance coverage’s, entitlements, general resident concerns and etc.
* The Supportive Services Coordinator offers budgeting classes to help residents cope with the strain of household finances. Coordinators will also take the route of presenting invited guests to speak on various topics and provide life skills training to include: identity theft classes, fire safety programs, local pharmacist speaking on drugs and their interaction with each other, Alzheimer’s, in-home medical services available to the residents and more.
* The Supportive Service Coordinator will reach out to local medical specialist to arrange on-site services ranging from flu vaccines to blood pressure checks.
* The Supportive Service Coordinator will provide a monthly newsletter that offers healthcare tips from various sources. Coordinators will also offer an annual Wellness Program that help residents cope with stress and the aging process.
* The Supportive Service Coordinator should maintain detailed notes regarding any assistance and services provided to the residents.

**Tab 7: Developer Capacity and Qualifications**

1. **Owner, Sponsor, Developer, Property Manager and Service Provider: Philadelphia Presbytery Homes and Services for the Aging, Inc. (d/b/a Presby’s Inspired Life)**

Philadelphia Presbytery Homes and Services for the Aging, Inc. (“Presby”) has long worked in the Philadelphia region to provide housing and supportive services to seniors. In 1954, the Presbytery of Philadelphia established a committee to provide quality housing for 14 elderly persons displaced by the Commonwealth’s closing of their previous residence. The following year, the Presbytery formed a corporation that later was to become known as Philadelphia Presbytery Homes, Inc. (PPH), which in 1995 formed the corporation Philadelphia Presbytery Homes and Services for the Aging Inc. (PPHSA) to further its work, making this the organization’s 59th year in existence. Doing business as Presby’s Inspired Life, PPHSA has been a successful developer and manager of thousands of units throughout the Greater Philadelphia Area.

For nearly **60 years Presby’s Inspired Life** (PIL) has provided quality senior living environments in the greater Philadelphia area. Today, Presby’s Inspired Life is a regional leader in senior living, providing continuing care and affordable housing to more than **3,000 residents in 31 communities** through the dedicated, compassionate work of nearly **1,100 employees**. The mission of the organization, from its beginnings, has been to provide exceptional communities and care for individuals representing a broad range of backgrounds, physical abilities and economic circumstances. Presby’s goal is to provide opportunities for all residents to continue to engage in what life has to offer to the extent they are able. A diverse, volunteer board of directors, chosen for their expertise and ability to represent the community’s interests, oversees Presby. Below is a list of the Board members and the Senior Executive team:

**Board of Directors:**

1. Board Chair Harry G. Dittmann,
2. Board Vice Chair Alan Griffith,
3. Francis Maloney,
4. Kenneth McKeown,
5. William G. Young, Jr.,
6. Dyann Paoline,
7. The Rev. Randy Barge,
8. Edward McFalls,
9. Bruce Castor,
10. Marilyn Dyson,
11. The Rev. Dr. Brent Eelman,
12. Walter Kubiak.
13. Lawrence M. Merlis,
14. G. Robert Overhiser,
15. Robert N. Reeves, Jr.

**Senior Executive Team:**

1. Judee M. Bavaria, President and CEO
2. Cindy Hoffman, Executive Vice President and CFO
3. Michelle T. Bryk, Vice President of HR
4. Vidhi Anderson, Executive Director of Housing and Land Development
5. Bill Canteen, Executive Director of Affordable Housing
6. Jennifer Kappen, Vice President of Finance
7. Lynn Johnson-Porter, Vice President of Philanthropy and Mission Support

**b. Team Structure:**

The Witherspoon Project team includes the following members:

1. **Presby’s Inspired Life- Owner, Sponsor, Developer, Property Manager**
2. **TN Ward- General Contractor**
3. **High Schwarz- Attorney**
4. **Kimmel Bogrette- Architect**

Please find below an overview for each member:

1. **Presbys Inspired Life**

Presbys is committed to developing **high quality affordable housing opportunities for low income seniors**. In all of their developments, Presby utilizes an experienced and qualified development team. The proposed project, Witherspoon Senior Apartments, involves the adaptive reuse of an existing nursing home with a new construction addition. The sources of funding will include low income housing tax credits, thus it was important that the project team have the experience necessary to successfully develop the project.

Property management of the Witherspoon Senior Apartments will be overseen by Presby’s Inspired Life. The on-site property management staff will include a program manager and a part-time maintenance worker. These positions require experience in working with affordable housing, rental subsidies and elderly residents. Presby has a **vast experience in managing properties that have different types of rental subsidies**.

Presby’s Inspired Life will be the service provider for the Witherspoon Senior Apartments. Presby has been serving the elderly in Philadelphia for more than 59 years. Presby has more than 1,100 employees, 115 of which are in the Affordable Housing Department, and has served 2,000 affordable senior clients in the last year. The services that Presby provides to seniors throughout its affordable housing communities **go beyond supplying an apartment**. The **philosophy of care is to nourish the body, mind, and soul** so that residents may live life in all its fullness while receiving the necessary supports. The scope of quality of life programming enables affordable housing residents to live an enhanced quality of life that they may otherwise not have known. Particular attention is paid to serving minorities through **outreach, education, marketing, and provision of services**.

1. **TN Ward- General Contractor**

T.N. Ward Company provides a vast array of experience constructing affordable multi-family housing throughout Philadelphia. In the last five years, T.N. Ward has completed more than seven affordable multi-family projects in Philadelphia, with a total of nearly 500 units, including projects it has successfully completed for Presby. Attached to this tab is a list of properties completed by TN Ward.

1. **High Swartz LLP- Attorney**

High Swartz LLP is a general practice law firm serving clients in Montgomery County, Philadelphia County, Chester County, Delaware County, Bucks County and throughout Southeastern Pennsylvania from its office in Norristown, Pennsylvania. Established in 1914, High, Swartz is the oldest law firm in Montgomery County.

The real estate attorneys at High Swartz have represented many for-profit and non-profit developers with respect to affordable housing and HUD financed projects. These have ranged from smaller low income housing tax credit (LIHTC) developments involving new construction of 40 or fewer apartment units; to Section 236(e)(2) rehabilitation/preservation transactions involving layered refinancing for 250 apartment units, the de-coupling of interest reduction payments from the original loan, and the application of such payments to new, HUD-insured, first lien financing. Several of the projects have involved mixed-use facilities requiring submission of the project building or buildings to a condominium regime or regimes, with commercial space on the first floor and residential units on the upper or adjacent floors.

1. **Kimmel Bogrette- Architect**

Kimmel Bogrette Architecture + Site has been providing extraordinary design solutions for ordinary budgets since 1995. Based in Conshohocken, the firm works to dispel the notion that meager budgets justify the mediocre outcomes that are built every day. Principals Jim Bogrette and Martin Kimmel bring with them more than 40 years of combined experience in helping clients fulfill their missions by transforming their unique needs into reality. Kimmel Bogrette has become a well-respected, award-winning design firm by combining experience, expectations and excellence that starts with the principals and is passed down through the firm and on to our clients.

With headquarters in Conshohocken, PA, Kimmel Bogrette has maintained a firm size of approximately a dozen employees and currently employs 14. Clients can be found throughout the region and as far away as Florida and Texas and include municipalities, universities, nonprofit organizations, churches, corporations, retailers, private developers, the medical profession, senior healthcare providers/developers and private individuals.

1. **Profile of Principals and Staff**

**Judee Bavaria- CEO, Presbys Inspired Life**

Prior to joining Presby, Judee was Corporate Compliance Officer and Vice President of Operations for Lutheran Services Northeast, a multi-site social ministry in Northeastern Pennsylvania. She also served in a variety of leadership capacities for the Commonwealth of Pennsylvania’s Department of Public Welfare.  
  
Judee’s leadership at Presby is marked by significant strides in meeting the critical need for affordable housing for economically-disadvantaged seniors. During her tenure, the affordable housing ministry has grown from 12 communities in 1999 to 27 today, in both sponsored and managed sites.

Judee’s achievements also include the execution of several strategic plans to expand and improve Presby’s continuing care communities so that they may better meet residents’ evolving needs. Her progressive oversight of capital improvement initiatives for existing communities, as well as the development of new communities, has enabled increased viability for the organization, setting the stage for its continued growth and securing its place in the senior living market.

Judee’s example as an accomplished leader has led other organizations to seek her expertise. She currently serves as Board Chair of Catholic Senior Housing and Healthcare Services in Allentown, PA; Co-chair of the Leadership Circle of the American Association of Homes and Services for the Aging (AAHSA); member of AAHSA’s Nominating Committee; previous member of the Pennsylvania Association of Non-Profit Senior Services (PANPHA) Board of Directors; and frequent presenter at various state and national senior living conferences. She also holds the honor of being selected from among her state-wide peers as the 2007 PANPHA Leader of the Year.

A Registered Nurse and licensed Nursing Home Administrator, Judee also holds a B.S. in Secondary Education from East Stroudsburg State University and an M.S. in Rehabilitation Counseling from the University of Scranton. She is a graduate of Misericordia Hospital School of Nursing.

**Vidhi Anderson- Executive Director of Housing and Land Development, Presbys Inspired Life**

Vidhi Anderson is Executive Director of Housing & Land Development, a new and critical leadership post designed to advance Presby’s affordable housing offerings. Vidhi is responsible for directing the development of new affordable housing projects, including applications, acquisitions and new construction. She also directs and manages construction projects and real estate actions, as well as analyzes and facilitates the refinancing and renovation of existing projects. Vidhi was most recently Vice President of Development with Diamond and Associates, a Philadelphia-based real estate consultancy firm specializing in affordable housing, tax credits and community revitalization and development initiatives.

Vidhi holds a master’s degree in city and regional planning with a concentration in community and economic development from the University of Pennsylvania, and a bachelor’s degree in architecture from the School of Planning and Architecture in New Delhi, India. Vidhi’s exceptional real estate project management skills and strong knowledge of the complex affordable housing process, particularly tax credits, make her an invaluable asset to the Presby’s Affordable Housing Ministry.

**Bill Canteen- Executive Director of Affordable Housing Management**

Prior to joining Presby, Bill was Regional Manager for Pennrose Management Company, a Philadelphia-based developer of Tax-Credit, U.S. Department of Housing and Urban Development (HUD) and market rate properties in Philadelphia, New Jersey and New York. Prior to that position, Bill was District Property Manager for the Marlton, New Jersey-based Interstate Reality Management Company, where he managed 15 HUD Section 8 and Tax Credit sites, totaling 1,807 units.

Bill holds a Bachelor of Science Degree in Economics and Business Administration from Benedict College, Columbia, South Carolina. He is certified as a Housing Credit Professional, as well as an Assisted Housing Manager.

**Bob Reid**

Bob Reid executes well orchestrated, successful projects that achieve design excellence, are sustainable, cost effective, and efficient to operate. Mr. Reid’s detail-oriented, in-depth approach allows him to translate each client’s needs and mission into a unique client experience that integrates function, design and efficiencies that deliver the highest value for the client’s investment. Bob joined Kimmel Bogrette after 24 years of experience at other firms, most recently as president of ELEVATE Architects + Collaborators. Bob has a great depth of experience in designing facilities for higher education, medical / healthcare, recreational / athletics, municipal, nonprofit, and residential. He has successfully completed projects at Widener University, Neumann University, University of Delaware and Lincoln University, to name just a few.

**Arnold Heller- Partner, High Swartz LLP**

Arnold Helleris a Partner, and joined High Swartz after more than 30 years in the Philadelphia office of Blank Rome LLP, 25 of which were spent as a partner in the real estate department. Arn has represented numerous clients in purchase and sales transactions and has extensive experience in title matters, finance, and drafting and negotiation of construction contracts. He advises a range of clients including affordable housing developers, healthcare providers, condominium developers, and homeowners associations on matters pertaining to the creation and preservation of housing as well as the formation of joint ventures, drafting and negotiation of construction contracts, acquisitions and sales, leases, sale/leasebacks, and matters pertaining to real estate transfer taxes. Mr. Heller practiced with the Appellate Section of the Tax Division of the United State Department of Justice from 1973 through 1977, and prior to that clerked for the United States District Court in the District of Columbia. He is a former Board member and Chairman of the Zoning Board of Tredyffrin Township in Chester County. Mr. Heller received his J.D. from Vanderbilt University Law School and his B.A. from Williams College.

**Tom Falvey- President, TN Ward**

Tom has over 40 years of experience in the construction industry. He has been with TN Ward since 1975. Tom has a significant design and building experience. He oversaw the construction of numerous large scale projects such as universities, hospitals, prisons, affordable housing etc. Some of the projects are highlighted below:

**Tioga Presbyterian Apartments** – 7-story 100,000 SF building with 115 senior citizen residential units completed in 10 months … 37% MBE/WBE participation (1995)

**Maryfield Presbyterian Apartments** – 6-story 80,000 SF brick façade building with 110 senior citizen residential units built with CMU walls and precast plank floor structure (1994)

**Reed Street Presbyterian Apartments** – 5-story 70,000 SF brick façade building with 86 senior citizen residential units built with masonry bearing walls and precast plank floor structure … 36% MBE/WBE participation (2002)

**Presby Homes Bensalem Apartments** – 3-story 50,000 SF building with 65 senior citizen residential units built with panelized wood load bearing walls and prefabricated wood truss system … Brick and siding façade (2001)

**Southwoods State Prison**, 3000 Cells, $250M, 85 acres, 28 buildings, 1,500,000 SF,

**Holy Family University** – Holy Family Hall Renovations, New Education & Technology Building, Accelerated Learning Center, Fitness Center, St. Joe’s Hall Dorm Renovations, Convent, 4th Floor Labs, Stephenson Lane Residence Hall – Combined program of approximately $50M

**Tab 8: Prior Affordable Housing Experience**

Presby has been in existence for 59 years and has been providing senior care in this region for decades. Presby’s has extensive experience in both market rate and affordable senior housing. Most of Presbys properties were developed using HUD 202 funds, HUD 236 program, LIHTC, tax exempt bonds and other state and federal funding sources. Majority of the Presby portfolio has operating subsidies from HUD.

**Market-Rate Housing-** Presby’s Inspired Life has completed and now operates four privately funded independent living, personal care, assisted living, and skilled nursing facilities, which assist 1,300 elderly persons. These communities are:

* Rydal Park, a Continuing Care Facility in the Abington Area;
* Broomall Nursing Home, a skilled and intermediate nursing facility;
* Rosemont Presbyterian Village, an independent living and personal care facility;
* Spring Mill Presbyterian Village, a personal care facility; and

Presby prides itself in providing the best possible care, communities, and strives to stay current in it’s offerings. As an example Rydal Park underwent a $38,000,000 medical center expansion completed in early 2012.

**Affordable Housing**- Since its beginnings in 1954, Presby’s Inspired Life has developed eleven affordable, subsidized communities comprised of 971 quality apartments, and acquired one additional 100 unit property. In addition, Presbys serves as a third party property manager for thirteen other properties which are sponsored by other developers. A list of the Presby affordable portfolio is highlighted below:

* Riverside Presbyterian Apartments; 150
* Morrisville Presbyterian Apartments; 99
* Mary Field Presbyterian Apartments; 99
* Ann Thomas Presbyterian Apartments; 74
* Tioga Presbyterian Apartments;113
* Old City Presbyterian Apartments; 59
* Interfaith House in Germantown; 95
* Reed Street Presbyterian Apartments \*; 84
* Jackson Place; 66
* Greenway Presbyterian Apartments; 67
* Mantua Presbyterian Apartments; 65
* Grace Court; 100
* On Lok House; 54
* Salba Apartments; 17
* Scottish Rite House; 125
* Scottish Rite Tower; 106
* Pensdale Apartments; 65
* Pensdale II Apartments; 38
* Mt. Tabor Senior Cyber Village; 56
* Las Jardines ; 24
* Neuman Senior Homes ; 65
* Paschall Senior Housing ; 63

The last three projects that Presby completed are highlighted below:

**Wynnefield Place:**

Wynnefield Place is a 43,996 sq. ft., 48-unit senior development in West Philadelphia for people aged 62 and older. The proposed project is located on N. 54th Street which includes several commercial establishments, schools, churches and two bus routes to connect residents to Center City and other nearby commercial corridors.

The new apartments will target low income seniors aged 62 years and older at or below 50% of area median income. Wynnefield Place is a four story apartment complex containing 48 one-bedroom units. There are sixteen units proposed for each of the three “typical” residential floors. Each unit will be 540 sq. ft. and include an entry, kitchen, living/dining room, spacious bathroom, bedroom, and two closets, located in the entry and bedroom. All apartments will be designed as adaptable units with an accessible route into and throughout all rooms and spaces. Of the 48 apartments, 10%, or 5 units will be available to those at or below 20% of the area median income. Additionally, 5% or 3 units will be fully handicapped accessible.

The common spaces on the ground level include vestibule and lobby, corridors, toilet room, multi-purpose room with a kitchen, community computer room and a tenant storage room. Common areas of the typical floors include elevator lobby with an adjacent lounge area, corridors, laundry room and an activity room. All common and ancillary areas will have total accessibility in and throughout these spaces. Wynnefield Place will meet an urgent need for affordable housing opportunities in the West Philadelphia community. The overall capture rate for low income housing is 2.6%, indicating that there is an extreme need for affordable housing units in the defined market area.

Wynnefield Place is currently **under construction** and scheduled to be complete by December, 2015. This project is a mixed finance project funded through HUD Section 202 funds, 4% LIHTC tax credit, tax exempt bonds and funds from the City of Philadelphia. The project closed on it’s financing in November, 2013 and is scheduled for construction completion in December of this year.

**Riverside Senior Apartments:**

Philadelphia Presbytery Apartments was built in 1981 as a HUD Section 202 direct loan program building with Section 8 rent subsidies. The building, located on North 23rd Street, provides housing to 150 low income seniors in 50 studio apartments and 100 one bedroom apartments. The building is 115,719 square feet with 8 apartments on the first floor, 16 apartments on each of the next 8 floors and 11 apartments on the 10th floor. The 10th floor also includes a resident dining room and kitchen.

 By 2005, it was evident that the building was in need of major exterior repairs and windows. The sponsor recognized that the building was located on prime real estate near the Schuylkill River, within walking distance to a number of Philadelphia attractions and near market rate condominiums. While the sponsor could have elected to sell the building, Presby’s Inspired Life remained committed to its mission and the seniors in Philadelphia Presbytery Apartments. The funds needed to renovate the building could not be obtained through traditional mortgage financing. Therefore, the project was refinanced as Riverside Senior Apartments, LP, with 4% LIHTC tax credits, Multifamily Housing Revenue Bonds, and Taxable Subordinate Note from Philadelphia Presbytery Apartments.

The renovations began in 2008 and continued through 2009. The renovations required moving residents off their floor, so the 2nd floor was cleared through attrition which then allowed residents to move onto the 2nd floor while their floor was renovated. Each floor took 7 to 8 weeks to renovate. The exterior renovations included replacing windows, coat panels and repair fasteners with rod and sealant at all joints, new fencing, concrete paving, and landscaping. Resident room refurbishments including carpet, paint, doors, ceiling tiles, lighting, kitchen cabinets, appliances, countertops, bathroom vanity, sink and ceiling. Nineteen of the units, 12.6%, were redesigned to be accessible units. A Neighborhood Network computer area was added as well as a serving kitchen. The heating system was converted and the hot water boiler was replaced. The elevators were also upgraded.

Presby’s Inspired Life is committed to Riverside and all our affordable housing projects and we want to ensure we continue to provide housing to seniors in a safe environment. We recognize that we must reinvest in our communities so that we can continue to serve seniors into the future.

**Mantua Presbyterian Apartments**

****The project involved new construction of Mantua Presbyterian Apartments, a 66-unit apartment building for low-income elderly persons aged 62 years and older. The first floor of the building contains retail space, the main lobby and reception area for the building, a community room with a kitchenette, and a computer room for the use of the residents. In addition, there is a surrounding 25-space parking lot with two spaces reserved for the exclusive use of the retail space tenants and customers. Floors two through six of the building contain the residential units. The project was financed through the HUD Section 202 Supportive Housing for the Elderly program. The project is located at 34th Street and Haverford Avenue in the Mantua neighborhood of Philadelphia.

**Tab 9: Property Management Plan**

Presbys Inspired Life will be the property manager of the proposed project. Presbys has extensive property management experience managing 27 affordable housing properties totally over 2,000 units. These properties include both HUD Section 202 financed and tax credit financed projects. Presby manages properties that they sponsor as well as engage in third party management for other developers. Below is a table showing the details of the management portfolio. Also attached is the MOR/REAC scores for all the properties managed by Presby. As the scores reflect, Presbys is an excellent manager and a leader in senior housing management in the region.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Development Name | Location | Total Project Cost | No. of Units | Owned or Managed | Status of Development | Type of Subsidy |
| Ann Thomas Presbyterian Apts. | 2000 S. 58th Street  Philadelphia, PA 19143 | $5,000,000. | 74 | Owned | Complete | Section 202 |
| Bensalem Presbyterian Apts. | 1900 Byberry Rd.  Bensalem, PA 19020 | $2,900,813. | 55 | Owned | Complete | Tax Credit |
| Casa Carmen Aponte | 2121 N. Howard St.  Philadelphia, PA 19122 |  | 35 | Managed | Complete | Section 202 |
| Community House | 5501 N. 11th Street  Philadelphia, PA 19141 |  | 73 | Managed | Complete | Section 202 |
| Grace Court | 550 S. Lansdowne Ave.  Yeadon, PA 19050 | $5,357,900. | 100 | Owned | Complete | Section 202 |
| Greenway Presbyterian Apts. | 2001 S. 59th Street  Philadelphia, PA 19143 | $7,669,500. | 67 | Owned | Complete | Section 202 |
| Interfaith House in Germantown | 18 W. Chelten Ave.  Philadelphia, PA 19144 | $5,823,300. | 95 | Owned | Complete | Section 202 |
| South Philadelphia Presbyterian Apts.  (Jackson Place) | 501 Jackson Street  Philadelphia, PA 19148 | $7,487,900. | 66 | Owned | Complete | Section 202 |
| Los Jardines | 1000 West 5th Street  Wilmington, DE 19805 | $3,389,200. | 24 | Managed | Complete | Section 202 |
| Mantua Presbyterian Apts. | 600-618 N. 34th Street  Philadelphia, PA 19104 | $8,897,000. | 65 | Owned | Complete | Section 202 |
| Mary Field Presbyterian Apts. | 2100 S. 58th Street  Philadelphia, PA 19143 | $6,885,100. | 99 | Owned | Complete | Section 202 |
| Morrisville Presbyterian Apts. | One Hillcrest Ave.  Morrisville, PA 19123 | $5,162,700. | 99 | Owned | Complete | Section 202 |
| Mt. Tabor Sr. Cyber Village | 973 N. 7th Street  Philadelphia, PA 19123 | $1,500,000. | 56 | Managed | Complete | Tax Credit |
| Neumann Senior Housing | 1601 Palmer Street  Philadelphia, PA 19125 | $10,544,200. | 65 | Managed | Complete | Section 202 |
| Old City Presbyterian Apts. | 25 N. 4th Street  Philadelphia, PA 19106 | $5,535,500. | 59 | Owned | Complete | Section 202 |
| On Lok House | 219 N. 10th Street  Philadelphia, PA 19107 | $5,387,400. | 54 | Managed | Complete | Section 202 |
| Paschall Senior Housing | 2125 S. 70th  Philadelphia, PA 19142 | $8,283,800. | 63 | Managed | Complete | Section 202 |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Development Name | Location | Total Project Cost | No. of Units | Owned or Managed | Status of Development | Type of Subsidy |
| Pensdale Apartments | 420 Pensdale Street  Philadelphia, PA 19142 | $7,019,900. | 65 | Managed | Complete | Section 202 |
| Pensdale II Apartments | 4200 B Mitchell Street  Philadelphia, PA 19142 | $1,140,000. | 38 | Managed | Complete | Tax Credit |
| Reed Street | 1401 S. 16th Street  Philadelphia, PA 19146 | $6,335,800. | 84 | Owned | Complete | Section 202 |
| Riverside Senior Apartments | 158 N. 23rd Street  Philadelphia, PA 19103 | $5,896,000. | 150 | Owned | Complete | Section 202 Tax Credit |
| Salba Apartments | 309 Walnut Street  Jenkintown, PA 19046 | $292,200 | 17 | Managed | Complete | Section 236 |
| Scottish Rite House | 1525 Fitzwater Street  Philadelphia, PA 19146 | $6,896,500. | 125 | Managed | Complete | Section 202 |
| Scottish Rite Tower | 1530 Fitzwater Street  Philadelphia, PA 19146 | $9,567,000. | 106 | Managed | Complete | Section 202 |
| St. John Neumann Place | 2600 Moore Street  Philadelphia, PA 19145 | $4,625,000. | 75 | Managed | Complete | Tax Credit |
| Tioga Presbyterian Apts. | 1531 W. Tioga Street  Philadelphia, PA 19140 | $9,005,600. | 113 | Owned | Complete | Section 202 |
| Wynnefield Place | 1717-1725 N. 54th Street  Philadelphia, PA 19131 | $7,737,500. | 47 | Owned | CIP | Section 202 Tax Credit |

1. **Staff:**

Presby will be in charge of managing the project. Presby will manage the operations of the project through an onsite property manager and a maintenance worker. Specifically the following staff will be responsible for the management and maintenance of the project:

• Judee Bavaria, Chief Executive Officer- Off Site

• Bill Canteen, Executive Director of Affordable Housing- Off Site

* Tameata Jordan, Assistant Director of Affordable Housing- Off Site
* Ennio Rossi, Facilities Director- Off Site
* Ruth James, Senior Housing Manager- On site
* Property Manager (to be hired)- On site full time
* Maintenance Worker (to be hired)- On Site part time

1. **Tenant Screening Methodology:** Please find attached asample tenant selection plan that details out the tenant screening methodology. This plan also outlines the income and other limitations, eligibility, waiting lists, admission and continued occupancy requirements and leasing policies which will be applicable to this project.
2. **Operation Methodologies:** Please find attached a draft Management Plan under this tab. A similar plan will be put together for the Witherspoon project. The plan will delineate in great detail how the management company will handle resident orientation, security, emergency, maintenance, grievances and evictions.

**Tab 10: Supportive Services Plan**

Presby’s Inspired Life, through its subsidiary Philadelphia Presbytery Homes, Inc., has developed a 62+ senior oriented supportive services plan that focuses on health services, education, technology, community activities, and interaction and connections with family and the world beyond the campus. By providing for the mental, physical, and spiritual well‐being of residents, residents can maintain an independent lifestyle and increase longevity. Presby very strongly believes in providing a holistic environment to its residents, one where they feel safe, secure and are able to age in place.

The services will be catered towards seniors who are 62 years of age or older. There are six units being set aside for seniors who are 62 years or older and have HIV/AIDS. The Service Coordinator will work twenty-four (24) hours per week to provide needs assessment and referrals to local senior centers for social programs, meals and supportive services.

* The Service Coordinator will also support resident activities and working with residents to establish a Resident Association.
* The Service Coordinator will provide intensive case management to residents of Witherspoon Apartments in areas of financial assistance, healthcare advocacy, housekeeping services, food services, conflict resolution and others.
* The Supportive Service Coordinator provides counseling services to residents in the areas of conflict resolution, crisis intervention, family support, benefits, insurance coverage’s, entitlements, general resident concerns and etc.
* The Supportive Services Coordinator offers budgeting classes to help residents cope with the strain of household finances. Coordinators will also take the route of presenting invited guests to speak on various topics and provide life skills training to include: identity theft classes, fire safety programs, local pharmacist speaking on drugs and their interaction with each other, Alzheimer’s, in-home medical services available to the residents and more.
* The Supportive Service Coordinator will reach out to local medical specialist to arrange on-site services ranging from flu vaccines to blood pressure checks.
* The Supportive Service Coordinator will provide a monthly newsletter that offers healthcare tips from various sources. Coordinators will also offer an annual Wellness Program that help residents cope with stress and the aging process.
* The Supportive Service Coordinator should maintain detailed notes regarding any assistance and services provided to the residents.
* The Service Coordinator must keep the client files in a secured location and accessible ONLY to the service coordinator and to management to the extent necessary.

**Neighborhood Networks Center**

Presby’s Inspired Life with the permission of the Board of Director’s will develop and operate a Computer Center that affords residents of WSA access to training and communication programs. Presby’s Inspired Life will work to identify funding for hardware, software, financial planning, technology assessments and systems designs, as well as technical and support services.

This center will truly increase the quality of life for the senior residents of WSA. The Neighborhood Networks Center at Witherspoon Apartments will contribute to the interaction of seniors with the outside world and will help relieve boredom, loneliness and isolation. Moreover, the group/library environment of the Neighborhood Networks Center will help develop relationships form many seniors, a Neighborhood Networks Center will help residents master their dreams.

The objective of the Neighborhood Networks Center is as follows:

* Enhance the basic literacy skills of seniors to assist them in maintaining independent lifestyles.
* To assist seniors in accessing computerized services, such as on-line shopping, the purchase of medications and communication with family and friends in distant lands.
* Improve Social Service accessibility by making the programs of local agencies available to resident families through the computer center.
* Expand resident’s activities through remote access and programs offered through the internet and social programs that are offered by other organizations throughout the world.

**Additional Services through Local Agencies**

Additional services will be provided to the residents from local social services agencies. As residents age in place, management will explore the possibility for meals to be delivered to the community room. Until such delivery is established, Meals on Wheels will be available to home bound residents. Residents will be linked with van transportation provided by Customized Community Transportation (CCT) a subsidiary of SEPTA. The cost of the service is $4.00 each way.

**Other Services**

The spiritual needs of the residents can be provided for in two ways – first, arranging volunteer transportation to local churches upon request, and second, to invite visiting ministerial staff upon request.

**Resident Council**

The resident council will be established with the help of Management to allow the residents a forum for activities, socialization and organization. As active independent elderly people, planning and organizing their own activities will give them an opportunity for self-determination.

Funding for these services will be provided through the supportive services line item in the operating budget, and includes the salary of a Social Services Coordinator who will be on site working with residents 16 hours per week.

To demonstrate the above and highlight the experience of the service provider, we have provided the following items:

 Service Provider Questionnaire and supporting documentation

 Supportive Services Plan

**Tab 11: Budgets**

Through the development of Witherspoon Senior Apartments, Presby is able to continue its mission to provide quality, affordable housing to low-income seniors. Presby has developed a funding plan that combines public and private resources and will leverage the City of Philadelphia’s funds by a factor of $1 to $10.20 of non-city funds.

Development Pro Forma: The total development cost for the Witherspoon Senior Apartments is $16,799,461. To leverage the City funds, Presby is seeking LIHTC credits from PHFA as well as committing to lending their own funds. Attached is a commitment letter from **Presby stipulating a loan of $1,200,000 to the project and a Deferred Developer Fee of $450,826**. With such enormous financial commitment, **Presbys shows its faith in the project and its commitment to serving the low income seniors in this neighborhood**. Presbys realizes the great need for housing and is dedicated to help. An application to PHFA will be submitted on January 30, 2015 for $1,300,000 in tax credits, creating $13,648,635 in equity. Attached is an Equity Letter from Red Stone Equity Partners confirming their intent to be an equity investor (and offering **$1.05 in pricing**) and bridge lender in the project.

Operating Budget: Please see the attached Exhibit B – 15 Year Operating Proforma for details. Presby is applying for a commitment from the Philadelphia Housing Authority to provide an Annual Contributions Contract for 45 apartments and Project based Voucher commitment for 15 units.

The funding application to the OHCD is concurrently being submitted with this application (on 11/21/14) and the award date is in January, 2015.

**Tab 12: Readiness and Project Schedule**

1. **Evidence of Site Control:** Presbys through its subsidiary owns the site. Please find attached an Option Agreement between the owner of the site, The Presbyterian Home at 58th Street, and the Philadelphia Presbytery Homes and Services for the Aging (PPHSA). PPHSA will be the sole member of a to be formed limited liability company which will be the general partner of the Pennsylvania limited partnership formed to acquire the property and complete the project. Also attached is a commitment that more fully describes the property.
2. **Evidence of Zoning:** The project has the necessary zoning approval. Attached is the zoning permit for the proposed rehabilitation and new construction. The building is currently vacant so there is no relocation.
3. **Project Schedule:** Please find below the project schedule for the Witherspoon Project.

|  |  |
| --- | --- |
| **PROJECT OBJECTIVE** | **DATE** |
|  |  |
| Site Control | Complete |
| Environmental review | October 2013 |
| Schematic Design Drawings | Complete |
| Design Development Drawings | May 2014 |
| Submission of applications for financing (PHFA) | January 2015 |
| Procurement of all financing | June 2015 |
| Issuance of building permits | January 2016 |
| Closing date | February 2016 |
| Construction begins | February 2016 |
| Construction completed | April 2017 |
| Marketing of units | November 2016 |
| Full occupancy | October 2017 |

1. **Relocation:** The site is currently vacant so there is no relocation.

**Tab 13: Occupancy and Affordability**

The Market Study conducted for the project notes that while the population is aging, **no new senior housing has been added to the area’s inventory.** The area includes no identifiable elevator accessible units, and while there are a few properties that include first‐floor accessible apartments for mobility‐impaired seniors, these units charge rents between $790‐850 plus utilities and would not be affordable to most seniors, and certainly not to low income ones. While more affordable rents for one bedroom apartments can be found in converted rowhouses, **many of these units are on the second floor of walk up buildings.** As such, these units are generally not appropriate for seniors who may have mobility problems, or who may not want to move as they age and their physical abilities decline.

The project is **located in an area of extreme poverty**. There is a huge demand for affordable housing for seniors. Witherspoon hopes to fill some of that need for housing. Rental subsidies are imperative for the operating feasibility of this project.

Please find below a table that show the unit type and the amount of subsidy attached to that unit. All utilities will be paid by the project. As the table states the PBV rents are restricted to the fair market rents for 1BR units in Philadelphia. Application for the PBV is currently being reviewed by the PHA. **The highlighted rows below reflect the units for which the ACC subsidy is requested.**

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **BR** | **# units** | **Avg SF** | **Tenant Paid Rent** | **Utility Allowance** | **Total Tenant Expense** | **Rental Asst Pmt--up to** | **Rental Asst Source** | **LIHTC Targeted Income Level** | **Monthly Income to Project Per Unit** |
|  |  |  |  |  |  |  |  |  |  |
| 1BR | 6 | 640 | 150 | - | 150 | 792 | PHA PBV | 20% | 942 |
| 1BR | 9 | 580 | 150 | - | 150 | 792 | PHA PBV | 50% | 942 |
| 1BR | 21 | 580 | 175 | - | 175 | 500 | PHA ACC | 50% | 675 |
| 1BR | 24 | 580 | 215 | - | 215 | 500 | PHA ACC | 60% | 715 |
|  | 60 |  |  |  |  |  |  |  |  |

All utilities will be paid by the project. Utilities included in the rent are:

Gas heat, Gas hot water, Gas cooking, Electric- lights and air conditioning, Water, Sewer

**Tab 14: Community Support**

1. Presby has been serving the Southwest Philadelphia community for 20 years, and has longstanding relationships with area community groups and elected representatives. Councilman Kenyatta Johnson of the second district has been supportive of the project. He recognizes the lack of affordable housing in his district and supports the Witherspoon project. State senator Anthony Williams has long been a supporter of Presbys Inspired Life and is very familiar with the 58th street campus. He strongly supports the project.

But most importantly groups from the surrounding community including City Lights, New Spirit Community Church and Grace Christian Tabernacle support the project. The campus offers the residents, the neighbors and the larger community a safe haven in an area that has high crime. A lot of these local groups and others such as the City of Philadelphia Office of the Mayor, State Representatives’ offices, the Girl Scouts of America, Reading Buddies, and Phone Buddies regularly utilize the community rooms in Presby’s existing on-campus buildings. Attached are some of the support letters from the community stake holders.

1. Presby is experienced in responding to community concerns about its developments. Presby has been a member of the community in which the Witherspoon Senior Apartments is located for more than 20 years. Presby has ongoing conversations with area community groups, and, as in all of its projects, is always prepared to address community questions or concerns. To the extent that any community issues arise during the operating of the project, Presby will draw on these partnerships to proactively address any concerns as they arise.

As part of the community outreach activities and in preparation for the need of a zoning variance, Presby presented the project to the community on **June 28th, 2013 at 10am** and **June 25th, 2014 at 10.30 am**. Community residents surrounding the site were informed about the meeting through flyers and notification by the local community group – Southwest CDC. During the meeting, Presby discussed the development plans and took note of all comments and suggestions from the residents. The list of attendees and the comments made during these meetings is attached to this tab.

1. Please find attached a signed certification stating that the comments from the residents, public housing residents and representative community groups have been considered in the revitalization of the property.

**Tab 15: Diversity**

1. **Minority and Women Business Enterprise**

Presby anticipates majority of involvement from minority and women owned businesses will come during the rehabilitation and construction phase. The general contractor, TN Ward’s Economic Opportunity Plan for the project is attached to this tab. Presby has established a goal of 20-25% MBE/WBE/DBE participation in construction and will require that TN Ward adopt these goals as well. Based on TN Ward’s attached plan, they have always exceeded owner and local requirements for MWBE and Section 3 hiring.

The market analyst on the team is a certified woman owned business. Their certification is attached in this tab.

1. **Section 3**

Presby is committed to local hiring, and has a number of employees on its management and maintenance staff who are local residents. As with the MWBE, the Section 3 hiring will be emphasized and prioritized during construction. It benefits both the contractor and the local community if the construction staff on the site is from around the neighborhood.

The management company has a good track record of local hiring. Qualified locals are excellent advocates of the property and the residents and are able to truly integrate the Presby ethos of being good neighbors.