

Tab 10. Supportive Services Plan

Francis House will serve the low-income frail elderly population of West Philadelphia; this is defined as: *adults aged 62+ who meet the definition of "frail" and whose monthly household income does not exceed 60% of the area median income.*

The definition of "frail elderly" in the rental housing context is established by the U.S. Department of Housing and Urban Development (HUD), which outlines the following: "*Frail elderly* means an elderly person who is unable to perform at least three activities of daily living...[which are defined as] eating, dressing, bathing, grooming, and household management activities." (24 CFR 891.205. 2013.)

Francis House offers a unique opportunity for frail elderly residents to access robust supportive services and maintain their health and quality of life through a personal care model of housing.

Francis House is intended to serve as a residence where an individual's personal care needs can be met in a 'neighborhood setting' such as if it were a home. The service model is to assist with the individual's activities of daily living, including eating, drinking, ambulating, transferring, toileting, personal hygiene such as bathing, dressing, managing healthcare and self-administering of medication. The residents of Francis House will not need the full 24-hour services of a nursing home; however, they are not safe to live on their own. Each resident will have an assessment to determine which services are appropriate for that resident's needs.

Francis House will have ample opportunities for residents to socialize and engage in programs at the development. The design of the building provides common dining and living areas for every ten dwelling units so residents can engage with one another during meals and throughout the day. There are additional community spaces that will function as programmatic space as well including an exercise room and chapel. Residents can also access the additional community gathering spaces on the

St. Ignatius campus including the auditorium, solarium and healing garden at St. Ignatius Nursing & Rehab Center.

Measurable target outcomes related to each goal are as follows:

- ✓ 100% of residents will be assessed within 3 days of occupancy.
- ✓ 100% of those residents who want/need services will have an individualized service plan within 7 days.
- ✓ 100% of residents with service plans will be assisted in obtaining referrals to all necessary services.

The Personal Care Administrator will meet with each resident upon entry or during the application process to Francis House to conduct an intake interview, educate the resident about the services available, and assess their ability to perform Activities of Daily Living. For willing residents, the Personal Care Administrator will work to schedule evaluation interviews to assess each resident's strengths and needs, agree upon a set of goals in accordance with those needs, and identify the specific services that will best serve each resident's goals.

From this information, staff and the resident will create an individualized service plan that will be used to guide and track service usage and goal attainment. The resident will then meet with staff on a regular basis to review their progress in terms of those goals developed in the initial meeting. In order to serve the needs and interests of the residents, the staff will adjust each resident's individualized plan as necessary.

St. Ignatius Nursing and Rehab Center will be responsible for providing or coordinating the provision of all services. Services will be available to all residents. A description of the services that will be provided, including where they will be provided, frequency of activity, and fees, where applicable, follows.

Supportive services will be provided on-site by universal workers, six working from 7am to 3pm, four working from 3pm to 11pm, and two working from 11pm to 7am. As such, 80% of staffing will occur

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during waking hours. This allotment will allow for 1 hour of assistance with activities of daily living (ADL) per resident without mobility needs per day and 2 hours of assistance with ADL per resident with mobility needs per day. A personal care administrator, either an RN or LPN with an associate's or bachelor's degree, will be on site daily to oversee service provision at Francis House. In addition to ADL services, Francis House will also provide three meals a day for all tenants, to be served in each of the six "neighborhoods." Francis House will utilize the commercial kitchen and laundry facilities located at the St. Ignatius Nursing & Rehab Center to provide meal and linen services to residents.

Through the capitalization of a supportive services reserve at closing, as well as drawing on both Section 9 subsidy and tenant SSI payments, Francis House would receive sufficient funds annually to pay for the provision of 24 hour staffing services, meals and Personal Care administration.

Services will be provided to residents in both their dwelling units, the common living and dining areas, and the community spaces located on each floor. Service provision will vary from resident to resident based on their individual needs.

Given the strengths of St. Ignatius's existing programs and developments, Francis House will collaborate where possible. For example, Francis House will utilize the commercial kitchen and laundry facilities already in place at St. Ignatius Nursing Home to provide daily meals and linen services to Francis House residents. Francis House residents will also have access to the entire St. Ignatius campus, including the healing garden, solarium and landscaped grounds.

The overall purpose of the services to be provided at Francis House is to enable residents to live healthful, and fulfilling lives. To this end, Francis House will contain dedicated support service space, including office space for service coordination, community spaces for every ten dwelling units and additional library, computer room and chapel space. Residents will be provided with access to a wide

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variety of services, including onsite services conducted by Francis House staff as well as referrals to external entities. As noted above, the staff will help residents develop individualized plans.

All services are available for all residents. Each resident will participate in the SSI Program administered by the Pennsylvania Department of Welfare based on such resident's low income and residency in a facility providing supportive services. Each resident will receive a monthly SSI payment that is intended to be used to cover both the rent for the unit in the Development and the cost of supportive services provided by the Development.

Under applicable regulations, the provision of meals is mandatory under this program and other supportive services are optional based upon the needs of each resident as determined by the Personal Care Administrator as described in Section 1(c) above. The fee for Supportive Services paid to Francis House under the SSI Program is excluded from gross rent for low income housing tax credit purposes under Code Section 42(g)(2)(B)(iii), without regard to whether the provision of such services is optional or elective on the part of the resident.

As noted above, the on-site Personal Care Administrator will conduct individual interviews with each resident to inform them about available services, evaluate their need for services, and encourage their participation. Residents' families, when applicable and appropriate, will also be informed about the services available. Staff will maintain regular contact with residents to keep them informed and updated on available services and activities.

Residents at Francis House will have access to staff 24 hours per day, with the majority of staff availability during the daytime hours. These staff will be available to assist residents with activities of daily living when necessary, administering medications, and providing basic housekeeping for residents and common spaces.

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SUPPORTIVE SERVICES STAFF POSITIONS

Role	Total Staff	Hours Per Week On Site
Universal Worker (7AM-3PM)	6	40
Universal Worker (3PM-11PM)	4	40
Universal Worker (11PM-7AM)	2	40
Personal Care Administrator	1	40
Supportive Services Coordinator	1	20

The design of Francis House is intended to keep staff within close proximity of residents. Each ten unit neighborhood contains office space for staff members. There is also office space for the Personal Care Administrator on the ground floor. These offices will include computers with Internet and email access as well as telephones.

As indicated by the draw down below, Francis House will capitalize a supportive services reserve that will fund a portion of supportive services throughout the 15 year compliance period.

Supportive Services Reserve

Year	Trending of Withdrawals 3.00%		
	Declining Balance	Withdrawals	1% Interest Earnings
1	\$502,864	\$29,120	\$4,737
2	\$478,482	\$29,994	\$4,485
3	\$452,973	\$30,893	\$4,221
4	\$426,301	\$31,820	\$3,945
5	\$398,425	\$32,775	\$3,657
6	\$369,307	\$33,758	\$3,355
7	\$338,904	\$34,771	\$3,041
8	\$307,175	\$35,814	\$2,714
9	\$274,075	\$36,888	\$2,372
10	\$239,558	\$37,995	\$2,016
11	\$203,579	\$39,135	\$1,644
12	\$166,088	\$40,309	\$1,258
13	\$127,037	\$41,518	\$855
14	\$86,374	\$42,764	\$436
15	\$44,047	\$44,047	\$0

Additionally, if awarded Section 9 operating subsidies, Francis House will enter into a Regulatory and Operating Agreement with the Philadelphia Housing Authority pursuant to which PHA will provide

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subsidy under Section 9 of the Housing Act of 1937 in the amount of \$500 per unit per month. This subsidy will be available to pay both real estate costs and supportive services costs.

The supportive services budget for the first year will be broken down as follows:

Supportive Services Expenses

Personal Care Administrator	\$	55,000
Supportive Service Coordinator	\$	42,000
Universal Workers	\$	442,117
Fringe	\$	94,303
Meals	\$	206,580
TOTAL ANNUAL SUPPORTIVE SERVICES	\$	840,000

To provide the best possible services and opportunities for residents, Francis House will collaborate with other entities to provide quality services to residents. Francis House will work with St. Ignatius Nursing & Rehab Center to provide meals and laundry services to residents. An MOU is attached in this tab.



Assumptions

Type	Unit Distribution		Rents		Total		Utility Allowance		Total Housing Costs	
	<=20%	>20% - 50%	<=20%	>20% - 50%	<=20%	>50%	<=20%	>20% - 50%	<=20%	>20% - 50%
0 Bdr	6	25	19,944	103,410	119,956	243,310			19,944	103,410
1 Bdr	0	0								
2 Bdr	0	0								
3 Bdr	0	0								
4 Bdr	0	0								
Total	6	25								
% of Units	10%	42%								

Trending Assumptions	
Income	2.0%
Expenses	3.0%
Vacancy	5.0%
Management Fee	5.0%

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
Income from Operations															
Gross Rental Income	\$ 243,310	\$ 248,176	\$ 253,139	\$ 258,202	\$ 263,366	\$ 268,633	\$ 274,006	\$ 279,486	\$ 285,076	\$ 290,777	\$ 296,593	\$ 302,525	\$ 308,575	\$ 314,747	\$ 321,042
Vacancy	12,165	12,409	12,657	13,432	13,168	13,432	13,700	13,974	14,254	14,539	14,830	15,126	15,429	15,737	16,052
NET RENTAL INCOME	\$ 231,144	\$ 235,767	\$ 240,482	\$ 245,292	\$ 250,198	\$ 255,202	\$ 260,306	\$ 265,512	\$ 270,822	\$ 276,239	\$ 281,763	\$ 287,399	\$ 293,147	\$ 299,010	\$ 304,990
Rental/Operating Subsidy	\$ 360,000	\$ 367,200	\$ 374,544	\$ 382,035	\$ 389,676	\$ 397,469	\$ 405,418	\$ 413,527	\$ 421,797	\$ 430,233	\$ 438,838	\$ 447,615	\$ 456,567	\$ 465,698	\$ 475,012
Other Income - Service	\$ 563,626	\$ 574,899	\$ 586,397	\$ 598,125	\$ 610,087	\$ 622,289	\$ 634,735	\$ 647,430	\$ 660,378	\$ 673,586	\$ 687,057	\$ 700,799	\$ 714,815	\$ 729,111	\$ 743,693
EFFECTIVE GROSS INCOME	\$ 1,154,771	\$ 1,177,866	\$ 1,201,423	\$ 1,225,452	\$ 1,249,961	\$ 1,274,960	\$ 1,300,459	\$ 1,326,468	\$ 1,352,998	\$ 1,380,058	\$ 1,407,659	\$ 1,435,812	\$ 1,464,528	\$ 1,493,819	\$ 1,523,695

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
Operating Expenses															
Management Fee	\$ 55,383	\$ 57,044	\$ 58,185	\$ 59,349	\$ 60,536	\$ 61,746	\$ 62,981	\$ 64,241	\$ 65,526	\$ 66,836	\$ 68,173	\$ 69,538	\$ 70,927	\$ 72,346	\$ 73,792
Administrative Expense	22,700	23,381	24,082	24,805	25,549	26,316	27,105	27,918	28,756	29,618	30,507	31,422	32,365	33,336	34,336
Utilities	46,590	47,988	49,427	50,910	52,437	54,011	55,631	57,300	59,019	60,789	62,613	64,491	66,426	68,419	70,471
Operating & Maintenance	42,815	44,202	45,629	46,894	48,301	49,750	51,243	52,780	54,363	55,994	57,674	59,404	61,187	63,022	64,913
Water/Sewer															
Payroll Expense	55,691	57,259	58,977	60,746	62,568	64,445	66,379	68,370	70,421	72,534	74,710	76,951	79,260	81,638	84,087
License and Permits	4,000	4,120	4,244	4,371	4,502	4,637	4,776	4,919	5,067	5,219	5,376	5,537	5,703	5,874	6,050
Property Taxes & Insurance	26,940	27,748	28,581	29,438	30,321	31,231	32,168	33,133	34,127	35,151	36,205	37,291	38,410	39,562	40,749
Investor Management Fee	5,000	5,150	5,305	5,464	5,628	5,796	5,970	6,149	6,334	6,524	6,719	6,919	7,124	7,334	7,549
Replacement Reserve	22,500	23,175	23,870	24,586	25,324	26,084	26,869	27,672	28,502	29,357	30,238	31,145	32,080	33,042	34,033
TOTAL EXPENSES	\$ 281,619	\$ 290,067	\$ 298,199	\$ 306,563	\$ 315,166	\$ 324,016	\$ 333,119	\$ 342,483	\$ 352,115	\$ 362,023	\$ 368,496	\$ 375,779	\$ 386,357	\$ 397,238	\$ 408,432
NET OPERATING INCOME	\$ 873,152	\$ 887,799	\$ 903,224	\$ 918,889	\$ 934,794	\$ 950,944	\$ 967,340	\$ 983,986	\$ 1,000,883	\$ 1,018,035	\$ 1,042,163	\$ 1,060,033	\$ 1,078,171	\$ 1,096,580	\$ 1,115,263

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
Cash Flow after Debt Service															
Supportive Service	\$ 840,000	\$ 856,800	\$ 873,936	\$ 891,415	\$ 909,243	\$ 927,428	\$ 945,976	\$ 964,896	\$ 984,194	\$ 1,003,878	\$ 1,023,955	\$ 1,044,434	\$ 1,065,323	\$ 1,086,630	\$ 1,108,362
Cash Flow After Supp Services	\$ 33,152	\$ 30,999	\$ 29,288	\$ 27,474	\$ 25,551	\$ 23,516	\$ 21,364	\$ 19,090	\$ 16,689	\$ 14,157	\$ 18,208	\$ 15,599	\$ 12,848	\$ 9,951	\$ 6,901

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