I. COURSE DOMAIN AND BOUNDARIES

Mixed-income housing is a key strategy in United States housing policy and practice, impacting low-income families and neighborhood development. Mixed-income communities are characterized by unique individual, family, property and neighborhood dynamics. This course will introduce students to the various elements of mixed-income housing including the roles of various stakeholders regarding a property’s social, financial, physical and compliance goals; the tools that link property performance to overarching objectives for the housing and its residents; the basics of real estate economics and an introduction to the Low Income Housing Tax Credit Program that is responsible for one-third of all rental housing produced today. The course will feature a national expert on mixed-income housing research. It will also include a site visit where students will have an opportunity to compare the impact of an affordable housing community and its service programming on both the residents and the surrounding community. Students will be able to compare “in the field” results with classroom theory.

II. COURSE OBJECTIVES

1. Students will learn the basic social, financial and physical objectives of mixed-income and affordable housing.

2. Students will explore the research conducted by the National Initiative on Mixed-Income Communities at the Mandel School of Applied Social Sciences at Case Western Reserve University.

3. Students will learn the key roles of various stakeholders in carrying out these goals, particularly those of the Owner, the Property Manager, the Resident Services Manager, the Investor and others.

4. Students will evaluate how well a property performs against stated goals detailed in its management plan.

5. Students will practice basic asset management techniques in the areas of property performance,
resident services, financial management, marketing and compliance, linking results to overarching objectives for the property and its residents.

6. Students will learn and practice strategies in working with the property manager, with a particular emphasis on maximizing the property manager/resident services manager relationship.

7. Students will learn the basic elements of the Low Income Housing Tax Credit program.

8. Students will examine best practices of an actual mixed-income/mixed race property that has performed well in all aspects of achieving its triple bottom line. This in-class case exercise provides students with detailed information on the history, ownership and management, neighborhood, resident characteristics, strategies for maximizing occupancy and achieving cash flow, financing sources and operating costs. Students will apply the learning they have acquired throughout the course to identify strategies that have contributed most to the property’s success including quantifiable performance indicators that illustrate that conclusion. This team exercise will be the foundation for each student’s final assignment to identify the keys to success of a different mixed-income/mixed-race property. The final assignment will be due no later than 5:00 PM Central Time on Friday January 26, 2018 and grades will be submitted no later than February 9, 2018.

III. Core Competencies and Practice Behaviors

| Demonstrate Ethical and Professional Behavior | C1 |
| Engage diversity and difference in practice. | C2 |
| Advance human rights and social and economic and environmental justice. | C3 |
| Engage in practice-informed research and research-informed practice. | C4 |
| Engage with individuals, families, groups, organizations, and communities | C6 |
| Assess individuals, families, groups, organizations, and communities | C7 |
| Intervene with individuals, families, groups, organizations, and communities | C8 |
| Evaluate individuals, families, groups, organizations, and communities | C9 |

IV. Brown School Academic Policies

Academic Integrity: Academic integrity in the completion of tests, oral presentations and written assignments (including statistical syntax) is expected. Violations of academic integrity (e.g., plagiarism) are very serious offenses. Violations will result in notification to the Assistant Dean for the appropriate (MSW or MPH) program and may result in referral to the Academic and Professional Integrity Committee, which could lead to dismissal from the program. Please review and adhere to the entire set of Academic Integrity guidelines in the student handbook on Inside Brown:

Student Handbook 2017-2018

Accommodations: If you have a learning disability, sensory, or physical disability or other impairment, and you may need special assistance in lectures, reading, written assignments, and/or exam taking, please contact the Brown School Director of Student Affairs who can provide coordination of accommodations at Washington University and the Brown School. The Disability Resource Center, a University-wide resource, provides diagnostic and academic accommodations support and referrals.

English Language Proficiency: If your English language proficiency is such that you may need special assistance in lectures, reading, written assignments, and/or exam taking, please communicate these needs to your instructor who may refer you to the English Language Program (ELP), a University-wide
resource which provides classes and academic English language support designed to increase non-native English speaking students' English language proficiency and to facilitate their academic success at Washington University. You may also find the Academic Assistance resources available through the Office for International Students and Scholars to be helpful.

Professional Use of Electronic Devices in the Classroom: Computers or other electronic devices, including “smart pens” (devices with an embedded computer and digital audio recorder which records the classroom lecture/discussion and links that recording to the notes taken by the student), may be used by students at the discretion of the faculty member to support the learning activities in the classroom. These include such activities as taking notes and accessing course readings under discussion. If a student wishes to use a smart-pen or other electronic device to audio record lectures or class discussions, they must notify the instructor in advance of doing so. Permission to use recording devices will be at the discretion of the instructor, unless this is an accommodation approved by Disability Resources.

Nonacademic use of laptops and other devices is distracting and seriously disrupts the learning process for everyone. Neither computers nor other electronic devices are to be used in the classroom during class for non-academic reasons. This use includes emailing, texting, social networking, and use of the Internet. The use of cell phones during class time is prohibited, and they should be set on silent before class begins. In the case of an emergency, please step out of the room to take the call. The instructor has the right to hold students accountable for meeting these expectations, and failure to do so may result in a loss of participation points, a loss of the privilege of computer use in the classroom, or being asked to leave the classroom.

Religious Holidays: The Brown School recognizes the individual student’s choice in observing religious holidays that occur during periods when classes are scheduled. Students are encouraged to arrange with their instructors to make up work missed as a result of religious observance, and instructors are asked to make every reasonable effort to accommodate such requests.

V. WASHINGTON UNIVERSITY ACADEMIC SUPPORT POLICIES

Accommodations based upon sexual assault: The University is committed to offering reasonable academic accommodations to students who are victims of sexual assault. Students are eligible for accommodation regardless of whether they seek criminal or disciplinary action. Depending on the specific nature of the allegation, such measures may include but are not limited to: implementation of a no-contact order, course/classroom assignment changes, and other academic support services and accommodations. If you need to request such accommodations, please direct your request to Kim Webb (kim_webb@wustl.edu), Director of the Relationship and Sexual Violence Prevention Center. Ms. Webb is a confidential resource; however, requests for accommodations will be shared with the appropriate University administration and faculty. The University will maintain as confidential any accommodations or protective measures provided to an individual student so long as it does not impair the ability to provide such measures.

If a student comes to me to discuss or disclose an instance of sexual assault, sex discrimination, sexual harassment, dating violence, domestic violence or stalking, or if I otherwise observe or become aware of such an allegation, I will keep the information as private as I can, but as a faculty member of Washington University, I am required to immediately report it to my Department Chair or Dean or directly to Ms. Jessica Kennedy, the University’s Title IX Director. If you would like to speak with directly Ms. Kennedy directly, she can be reached at (314) 935-3118, jw kenned y@wustl.edu, or by visiting the Title IX office in Umrah Hall. Additionally, you can report incidents or complaints to the Office of Student Conduct and
Community Standards or by contacting WUPD at (314) 935-5555 or your local law enforcement agency. See: Title IX

You can also speak confidentially and learn more about available resources at the Relationship and Sexual Violence Prevention Center by calling (314) 935-8761 or visiting the 4th floor of Seigle Hall. See: RSVP Center

Bias Reporting: The University has a process through which students, faculty, staff and community members who have experienced or witnessed incidents of bias, prejudice or discrimination against a student can report their experiences to the University’s Bias Report and Support System (BRSS) team. See: brss.wustl.edu

Mental Health: Mental Health Services’ professional staff members work with students to resolve personal and interpersonal difficulties, many of which can affect the academic experience. These include conflicts with or worry about friends or family, concerns about eating or drinking patterns, and feelings of anxiety and depression. See shs.wustl.edu/MentalHealth

Additional Issues or Concerns: If you feel that you need additional supports in order to be successful in your time at Brown, beyond the afore mentioned accommodations, please contact Essie Rochman, Director of Student Affairs at erochman@wustl.edu. She can assist you in navigating a myriad of concerns. Her office is in Brown Hall, room 320.

VI. ORGANIZATION OF COURSE

This is a one-week course that will meet daily, Monday through Friday, from 9 am until 4 pm with a one-hour lunch break and a 15-minute break in the morning and afternoon. The course will begin with an overview of the history of affordable housing in the United States. There will be an examination of the outcomes in the mixed-income model, based on academic research presented by an expert in this research. The focus will then shift to exploring various mission/social, financial, physical and stakeholder goals of affordable housing, both within a neighborhood and with the residents themselves. After acquiring a foundation in basic housing operations and analysis, including the fundamentals of the Low Income Housing Tax Credit program that fuels one-third of affordable housing and is the financial backbone of mixed-income housing, the class will work on a case study to evaluate how well a property is meeting its goals. The course will go on to examine the role resident/social services play in maximizing a property’s performance, including its mission. This exploration will include evaluating the impact of an affordable St Louis affordable housing community and its service programming on both the residents and the surrounding community. The course will go on to investigate other key components of property operations including techniques for maximizing the relationship between the property and resident services managers as well as strategies for successfully marketing and stabilizing the occupancy of mixed-income properties. Finally, a profile of today’s affordable housing industry today will be analyzed, including an exploration of its career opportunities.

VII. ROLE OF FACULTY AND STUDENTS

A. Instructor’s Role:
The instructor will lecture, facilitate class discussions and exercises and encourage open discussion. The instructor’s role is also to foster an environment in which students’ values, knowledge and experiences can be explored and their diverse perspectives can be understood, respected and critically examined. The instructor will also provide readings, assignment information, and be available for consultation and feedback. The instructor invites students to give feedback and suggestions throughout the course.
B. Co-Teachers’ Role.
The co-teacher will attend class as a supportive resource. The co-teacher will help Instructor Weber provide students with support and guidance. The co-teacher should be assessed according to their roles in the course: serving as an advocate for students’ needs and issues; providing subject matter expertise as relevant; and providing students with additional feedback on assignments.

C. Student’s Role:
Students are expected to attend class and actively participate. The classroom environment is the mutual responsibility of the instructor and the students. Students are expected to complete any assigned readings, actively participate in class discussions and exercises, and submit the final assignment in accordance with instructions and by the date it is to be submitted.

D. In The Classroom:
It is expected that students will attend all class meetings, read the assigned reading assignments prior to class, prepare and discuss reading assignments. It is the student’s responsibility to seek guidance and feedback from the instructor as needed to assure individual progress. Students are expected to attend all class sessions unless illness or other emergencies make attendance impossible. Students should notify the instructor if a class will be missed due to an emergency. If a student is unable to attend class, please contact the instructor in advance, if that is not possible immediately after class. Students are expected to share their knowledge, experience, comments, critiques, feedback, and alternative approaches.

Accommodations/Special Needs:
If you have a disability or impairment that requires an accommodation, please contact the Washington University Disability Student Services at the Disability Resource Center, Voice/TTY: 935-4062, FAX, 935-8272. After having contacted them, please contact the instructor. If you have a learning disability, sensory, or physical disability or other impairment, or if English is your second language and you may need special assistance in lecture, reading assignments, and/or testing, please contact the instructor.

VIII. COMPETENCY ALIGNMENT TO ASSIGNMENTS AND COURSE ACTIVITIES

<table>
<thead>
<tr>
<th>Competency/Competencies</th>
<th>Dimension/Dimensions Measured</th>
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<tbody>
<tr>
<td>Graded Assignments</td>
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<tr>
<td>Final project</td>
<td>C4, C7, C9, C5</td>
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<tr>
<td>Course Activities</td>
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<tr>
<td>Participation in class discussions</td>
<td>C1, C2, C3, C5</td>
</tr>
<tr>
<td>Participation in Day 4’s case study</td>
<td>C1, C2, C6, C8, C9</td>
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<tr>
<td>Participation in class group exercises</td>
<td>C1, C8, C9</td>
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IX. ASSIGNMENTS AND GRADING CRITERIA

A. Class Assignments, including Readings

There are several in-class group exercises that will prepare the student to complete an individual case study within two weeks of the conclusion of the class. The readings are primarily research studies on the topics discussed in class. They will be referenced throughout the course. The Course Outline below identifies the required readings to be completed before class begins as well as those required to be completed during the class.

B. Final Assignment

The final assignment will be a three to five page paper on one of the case studies from the Seven Strategies for Successfully Marketing and Stabilizing the Occupancy of Mixed-Income/Mixed-Race Properties material. Students will select from among the case studies not used during the last day of class. They will be given five specific questions to answer about the case study that address the social, financial, physical and stakeholder goals for the property. They will draw on their readings, class lectures, and class exercises to inform their observations and recommendations for the property to continue to achieve its multiple objectives. The final assignment is due on Friday January 27, 2017 at 5:00 pm central (St Louis) time.

C. Grading Criteria

Grades are assigned to each student taking the course for credit. The grade is composed of the following elements:

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<thead>
<tr>
<th>Percentage</th>
<th>Component</th>
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<tbody>
<tr>
<td>15%</td>
<td>Participation in class discussions</td>
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<tr>
<td>20%</td>
<td>Participation in Day 4’s case study (Thursday January 7, 2016)</td>
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<tr>
<td>25%</td>
<td>Participation with in-class group exercises</td>
</tr>
<tr>
<td>40%</td>
<td>Final project (written document)</td>
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Letter Grading Scale

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<thead>
<tr>
<th>Percentage</th>
<th>Grade</th>
<th>Percentage</th>
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</thead>
<tbody>
<tr>
<td>95% - 100%</td>
<td>A</td>
<td>77% - 79%</td>
<td>C+</td>
<td></td>
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</tr>
<tr>
<td>90% - 94%</td>
<td>A-</td>
<td>74% - 76%</td>
<td>C</td>
<td></td>
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<tr>
<td>87% - 89%</td>
<td>B+</td>
<td>70% - 73%</td>
<td>C-</td>
<td></td>
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<tr>
<td>84% - 86%</td>
<td>B</td>
<td>Below 70%</td>
<td>F</td>
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<tr>
<td>80% - 83%</td>
<td>B-</td>
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An additional ten (10) points will be deducted for each day the final project is late.
X. READING MATERIALS

These are readings relevant to this class. Those that are required will be noted in the course outline.


This research article and its accompanying case studies will be key elements of the last day’s case study and the students’ final take home assignment. They can be found on the flash drive distributed in class.

   a. Milpitas, California Case Study
   b. Carrollton, Texas Case Study
   c. Roxbury, Massachusetts Case Study
   d. Cambridge, Massachusetts Case Study
   e. Manchester, New Hampshire Case Study
   f. Vista, California Case Study
   g. Poway, California Case Study
   h. Jacksonville, Florida Case Study


15. Selected publications on *Mixed-Income Communities* from Case Western Reserve Mandel School of Social Services: [http://nimc.case.edu/research/publications](http://nimc.case.edu/research/publications)

17. **State of the Field Scan #1: Social Dynamics in Mixed-Income Developments.** National Initiative on Mixed-Income Communities (2013) at Mandel School of Applied Social Services at Case Western Reserve University.

   blog.case.edu/nimc/2013/12/05/State_of_the_Field_Scan_1_National_Initiative_on_Mixed-Income_Communities.pdf

18. **State of the Field Scan #2: Resident Services in Mixed-Income Developments.** National Initiative on Mixed-Income Communities (2015) at Mandel School of Applied Social Services at Case Western Reserve University.


**XI. COURSE OUTLINE**

**Day 1 Required Reading**

1. Ben Austen (May 2012). **The Last Tower.** The decline and fall of public housing. Harper’s Magazine. [http://harpers.org/archive/2012/05/the-last-tower](http://harpers.org/archive/2012/05/the-last-tower)

2. **State of the Field Scan #1: Social Dynamics in Mixed-Income Developments.** National Initiative on Mixed-Income Communities (2013) at Mandel School of Applied Social Services at Case Western Reserve University.

   blog.case.edu/nimc/2013/12/05/State_of_the_Field_Scan_1_National_Initiative_on_Mixed-Income_Communities.pdf (pp 1 – 28)


**Day 1  Goals and Outcomes of Mixed-Income and Affordable Housing**

2. Course overview, learning objectives, expectations

3. What Is Mixed-Income Housing and what are its objectives? How does it differ from affordable housing?
   - Brief history of subsidized housing in the United States
   - Photographs of different examples from HOPE VI to smaller LIHTC deals

4. Summary of findings of the National Initiative on Mixed-Income Communities at the Mandel School of Applied Social Sciences at Case Western Reserve University.

5. Triple bottom line (financial viability, social mission, physical sustainability (green))
6. What are the key roles in carrying out these objectives? What do they do?
   - The Board
   - Asset Management
   - Property Management
     - Marketing and Resident Selection
     - Compliance
     - Administrative
     - Maintenance
   - Resident Services
   - Stakeholders

7. What are key property performance standards against which to measure these objectives?

Day 2 Required Reading


   [http://neighborworks.issuelab.org/resource/green_housing_improved_health_a_winning_combination](http://neighborworks.issuelab.org/resource/green_housing_improved_health_a_winning_combination) (1 – 16 pp)

Day 2 Transitioning from Property to Asset Management

- Property Diagnostics

- Review of Key Documents: Management Plan, Management Agreement
  Learning Exercise – role play

8. Twin Falls Case Study
   - Comparing property performance to a owner’s multiple objectives, including targeted households, and a management plan
   - Includes hands-on group analysis of marketing and occupancy, collections and evictions, risk management and maintenance to determine how well the manager achieved the original goals for the property and its residents

Day 3 Required Reading


Day 3  The Asset Management Function and Tools

- Basic Financial Tools for Property and Resident Services Managers
  - Financial reports (budgets, financial statements, audits)
  - Mini-case study – Northside Manor

- Comparability, Benchmarking and Trending
  - How do you know how well you are performing?
  - Where do you find comparables?
  - Why does trending matter?
  - Mini case study – TP Community Associates

- The role of the asset management function – Who, What, When and How
  - The arc of asset management
  - The role of the Board in mixed-income and affordable housing
  - Knowing the deal
  - Why projects fail
  - What asset managers do
    - Manage the manager; manage resident services (??)
    - Compliance, Monitoring and Reporting
    - Risk Management and Capital Planning
    - Maximize Owner Objectives and Strengthen the Organization
  - What skills are needed
  - Mini case study – why is Wayward Arms failing?

- How do the readings inform any other roles for the asset manager?

Day 4 Required Reading

   (pp 1 – 21)

2. Creating Opportunities for Families through Resident Services – A Practitioner’s Manual – Volume One; pp 103-143;  

   [https://gallery.mailchimp.com/90054719b11d39adfa348e50f/files/State_of_the_Field_Scan_2_National_Initiative_on_Mixed_Income_Communities_final.pdf](https://gallery.mailchimp.com/90054719b11d39adfa348e50f/files/State_of_the_Field_Scan_2_National_Initiative_on_Mixed_Income_Communities_final.pdf)  
   Executive Summary (pp 1 – 4)

Day 4 Overview of Resident Services; Getting the Most from the Property and Resident Services Managers’ Relationship

- The role of resident services in maximizing property performance
  - Community Housing Partners Comparative Study – flashdrive
  - Resident Services Outcome Measurement – student workbook
  - Site visit: evaluating impact of the affordable housing community and its programming on the community and the residents
  - Comparing field work to best practices

Day 5 Required Reading


*Students will be assigned one of the following two case studies for Day Four’s in class work:*

- Manchester, New Hampshire Case Study. (21 pages)
- Poway, California Case Study. (16 pages)

These case studies are in the student work book and on the flash drive.

Day 5 Intro to Low Income Housing Tax Credits; Best Practices in Assuring Success

- Profile of the mixed-income and affordable housing industry
- Fundamentals of the low income housing tax credit program
- Strategies for Successfully Marketing and Stabilizing the Occupancy of Mixed-Income/Mixed Race Properties
  - Best Practices
  - Learning Exercise

Day 5 In-Class Case Study

Students will examine best practices of an actual property that has performed well in all aspects of achieving its triple bottom line. Case study contains detailed information on the history, ownership and management, neighborhood, resident characteristics, strategies for maximizing occupancy and achieving cash flow, financing sources and operating costs.

Case study work includes hands-on group analysis of (a) key property, resident and neighborhood characteristics; (b) strategies that have contributed most to the property’s success including five quantifiable performance indicators that illustrate that conclusion; and (c) key areas of focus to assure continued success of property in all aspects of its triple bottom line goals.
This case study will prepare the students for their final individual assignment.

Final Assignment Required Reading

Students may select from one of the following case studies for their final assignment. The case studies are on the flash drive distributed during the first day of class.

- Milpitas, California Case Study
- Carrolton, Texas Case Study
- Roxbury, Massachusetts Case Study
- Cambridge, Massachusetts Case Study
- Vista, California Case Study
- Jacksonville, Florida Case Study

Instructions for the final written assignment are in the student workbook made available at the beginning of class.