

AFFORDABLE HOUSING ADVISORY COMMITTEE
LOCATION: OFFICE OF HOUSNG
421 KING STREET SUITE 200
THURDAY, SEPTEMBER 8, 2011, 7:00PM

AGENDA

1. Consideration of the Minutes of July 7, 2011 meeting 7:00 p.m.
2. Reports from the Office of Housing 7:05 p.m.
 - Beauregard Plan
 - Assisted Housing Transactions
 - Green Revolving Loan Fund – EECBG
 - Arlandria Chirilagua Housing Corporation (June Docket item attached)
3. Report from the Alexandria Redevelopment and Housing Authority (ARHA) 7:25 p.m.
4. Report from the Alexandria Housing Development Corporation (AHDC) 7:30 p.m.
5. Information Items (see below): 7:35 p.m.
 - a. Housing Trust Fund Financial Summary for FY 2011
 - b. Housing Opportunities Fund Financial Status for FY 2011
 - c. Homeownership Programs Report for FY 2011
 - d. Draft Strategic Plan on Aging, 2012-2016
 - e. Homeless Services Coordinating Committee Letter to the Mayor and City Council
6. Announcements and Upcoming Housing Meetings 7:45 p.m.
7. Adjournment 7:50 p.m.

AFFORDABLE HOUSING ADVISORY COMMITTEE
Minutes of the Meeting of July 07, 2011

<u>Members Present</u>		<u>Staff Present</u>	<u>Guests Present</u>
Michael Caison, Chair	Sonya Sachs	Mildrilyn Davis	Annabelle Fischer
Bill Harris	Katherine Medina	Eric Keeler	
Michael Butler	Carter Flemming	Jon Frederick	
Rick Liu	Jack Corrado		
Patrick McCresh			

The July meeting of the Affordable Housing Advisory Committee, was held in Room 2000 of City Hall, and was called to order at 7:00 PM by Michael Caison, Chair.

1. Minutes of the June 13, 2001 meeting of AHAC were approved by consent as distributed.
2. The AHAC FY 2010-2011 Annual Report was approved by consent as distributed.
3. Carter Flemming provided an update on the activities of the Alexandria Housing and Redevelopment Authority (ARHA). Ms. Flemming reported on the funds that had been repaid to the City due to closing on the Quaker Hill Project. Ms. Flemming also provided an update regarding ARHA's progress in acquiring 16 replacement units pertaining to the James Bland Redevelopment Project.
4. Michael Caison provided an update on the Alexandria Housing Development Corporation (AHDC). Mr. Caison reported that AHDC had just completed the acquisition of three apartment complexes, Lacy Court, Arbelo, and Longview Terrace, that had previously been owned by RPJ Housing Corporation. Mr. Caison also provided an update on AHDC's search for a new Executive Director.
5. Staff provided an update on the financial status of the City's Housing Trust Fund and Housing Opportunities Fund. Staff also provided information regarding upcoming meetings and events pertaining to affordable housing.
6. Following these announcements, the Chair adjourned the meeting at 7:30 P.M.



The Alexandria of Our Future

A Livable Community for All Ages
Strategic Plan on Aging, 2012-2016

Note: *This WORD document varies in design quality from the version of this document using Indesign software, which has been professionally laid out. The page numbers in this document vary slightly from the page numbers in the professionally designed version.*

ACKNOWLEDGEMENTS

JustPartners, Inc., expresses appreciation to the many Alexandrians who participated in the development of this Plan. In particular, we thank MaryAnn Griffin, Director of the Alexandria Division of Aging and Adult Services, and Debbie Ludington and Diana Reynoso from her staff; Jane King, Chair of the Alexandria Commission on Aging, and her colleagues; members of the Strategic Plan Advisory Group; the Aging Liaisons from the City's departments; Mayor William Euille and other elected and appointed officials who participated in discussions and town halls; Alexandria residents who offered their ideas through town halls, written input, and a public hearing; and the local organizations and volunteers who distributed information about the town hall meetings and staffed the events. Such mobilization of the community on behalf of its older residents is impressive. The Plan offered here demonstrates that a focus on the well-being of older residents can advance a livable community for *all* ages.

JustPartners, Inc. is a Baltimore-based nonprofit consulting group whose Viable Futures Center (www.viablefuturescenter.org) promotes age-inclusive communities, racial equity, and strategic solutions for tough times.

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The Alexandria of Our Future

A Livable Community for All Ages

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Overview

The premises on which this Strategic Plan is based are that:

- *Older residents are a natural resource whose talents and contributions to the life of the City are fundamental to its health and vitality;*
- *Many attributes making a community more livable for older adults enhance its livability for all ages;*
- *Government alone cannot create the community that most older Alexandrians desire.*

Many of the Objectives and Action Steps in this plan address more than one problem simultaneously, suggest the engagement of many partners beyond the aging network, and meet the needs of younger residents and stakeholders as well as those who are older.

Most Americans want to stay in their own homes and communities as they age. Alexandria offers attractive features in abundance that make the desire to age at home especially compelling. Its residents are proud of their City -- its diverse and distinct neighborhoods, distinguished history, plentiful restaurants, the Potomac waterfront, many shopping areas, parks and walkable streets, access to mass transit, celebration of the arts, small town character and a reputation for resident engagement.

For Alexandria and the nation, however, changing demographics are creating the imperative to plan for an aging population that will have doubled from the year 2000 to 2030. Many among the baby boomers, whose sheer numbers have changed the nature of our society from their adolescence to their aging years, expect their communities to adjust to their longer life spans, provide a variety of choices in key areas of life, support their ambition to work or volunteer in activities that are suitable for their expertise and experience, and accommodate their desire to continue active engagement in their neighborhoods and communities for many years to come.

Planning in the City acknowledges the diversity of its residents, who represent a range of incomes, educational attainment, nationalities, and racial and cultural heritages and speak many languages (at least 45).¹ In planning for aging residents, therefore, Alexandria must necessarily account for an extraordinary array of expectations and needs.

Fortunately, Alexandria is clearly attuned to the future. In recent years, the City Council has approved several strategic plans that incorporate innovative and comprehensive approaches to protecting the environment (the Eco-City Plan), enhancing access for all Alexandrians to a variety of modes of transportation that lessen the use of automobiles (2008 Master Plan for Transportation), creating a state-of-the art school system (Alexandria City Schools Strategic Plan 2010-2015) and developing housing that meets the needs of Alexandria's very

¹ <http://www.usefoundation.org/userdata/file/Research/Regions/virginia.pdf> 4/23/2011, accessed 5.5.11.

heterogeneous population (Housing Plan, in development). The City Council also approved a plan in 2010 that integrates many of the strategies and action steps defined in the individual plans.

These plans, as they are implemented, will benefit Alexandrians of all ages and abilities. However, the City Council agreed in May 2010 that the City could not satisfactorily address the needs and aspirations of its aging residents without a closer examination of the implications for Alexandria of their rapidly increasing numbers and the transformation occurring in the meaning of later life. As have other forward-thinking communities, Alexandria's leaders recognized that the numbers and accompanying expectations of its aging residents represent a new phenomenon in human history and authorized the development of a Strategic Plan on Aging. This Plan both complements the other City plans and seeks wherever possible to benefit Alexandria residents beyond the older population.

While their large numbers alone necessitate careful scrutiny of their impact on the community, many of the City's older residents, like their peers across the country, are healthier and more affluent and will stay active longer than prior generations. They want to stay in and give back to their communities. Their capacity to continue to serve their community as they age is unparalleled, as is their ability to contribute to its economic development.

At the same time, many older residents will need modifications to their homes to sustain their independence and will rely in their later years on modes of transportation other than the automobile. The City must accommodate and plan for those older Alexandrians who are or will be frail, disabled or ill and need in-home or institutional support, both for those who can afford to pay and those who cannot. For older Alexandrians, as for all residents, maintaining health and a good quality of life are essential goals.

While the population of Alexandria's 65-plus residents doubles, the constraints on budgets will make it impossible to double the resources available to older City residents. Alexandrians who volunteer, many of whom are older, already fill gaps in services and enhance the ability of their more vulnerable peers to continue to live independently in their homes. They deliver Meals on Wheels, provide care to older family members, support Alexandria at Home (AHA!), rehabilitate housing for Rebuilding Together, contribute to Senior Services of Alexandria and ALIVE, assist older participants in faith-based communities and volunteer for a variety of other supportive services. Their volunteerism benefits other generations, as well.

Prior to developing this Plan, the views of a broad cross-section of Alexandria residents were solicited, to include older adults and boomers, and many stakeholders representing Alexandria government, non-profit and service organizations, faith-based institutions and business interests in the City. These views played a critical role in the determination of the Goals and Objectives set forth in the Plan. To frame and supplement the views of Alexandrians, JustPartners, Inc. (JPI) completed a comprehensive scan of local, state and national data, trends, strategies and practices. Through this scan, JPI identified the experiences and approaches of other communities that contribute to an understanding of the strategic

direction that will make Alexandria an especially attractive, desirable and livable community for all ages.

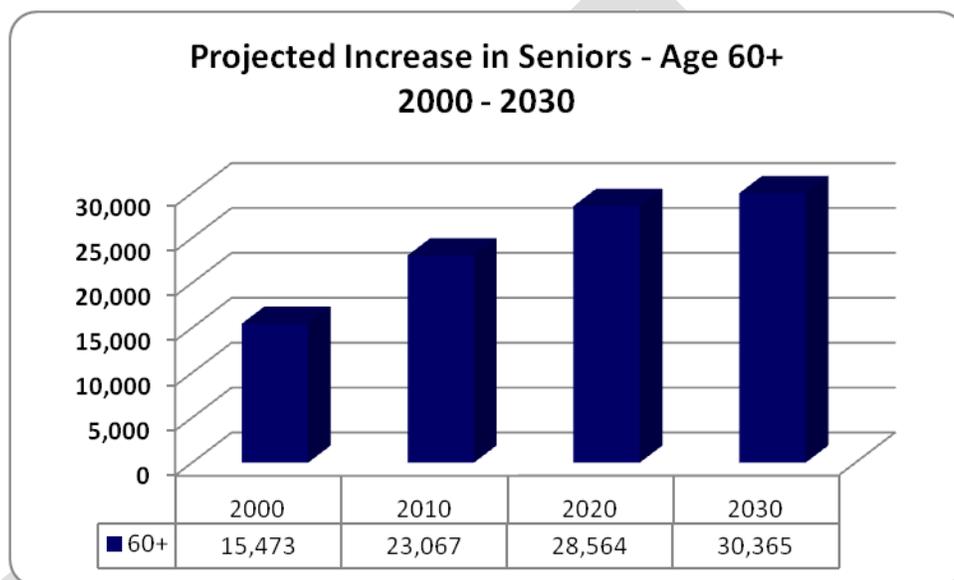
The vision of the Strategic Plan on Aging is as follows: ***Residents choose to stay in Alexandria as they age because it is a livable community for all ages.*** The Plan proposes seven interrelated goals that must be met to ensure this vision:

- **Goal #1. Communications and Outreach.** Information about services and programs is readily available and accessible in a variety of formats and venues for older residents of Alexandria, their families and caregivers, local organizations and businesses.
- **Goal #2. Housing.** A range of affordable, accessible and supportive housing is available that meets the needs of older residents of the City to be able to age at home.
- **Goal #3. Transportation.** A variety of mobility options, including pedestrian-safe streets, make moving in and around the City and region possible for Alexandrians of all ages and abilities.
- **Goal #4. Community Services.** Community services accommodate the expectations and needs of aging Alexandrians and support their caregivers.
- **Goal #5. Economic and Workforce Development.** The important contributions of older Alexandrians to the City's economy are recognized and the innovative entrepreneurship of older residents is encouraged.
- **Goal #6. Quality of Life.** The quality of life of all Alexandrians is enhanced by the many volunteer activities of its older residents and their continued involvement in the social and civic life of the City.
- **Goal #7. Health, Wellness, and Safety.** All residents, with special attention to lower-income older City residents, optimize their wellness and receive the health care they require.

Chapter 1. Why a Strategic Plan on Aging Now?

Seniors as a Growing Natural Resource

The large demographic bubble called the baby boom generation is starting to make waves in Alexandria. Thanks to boomers, between 2000 and 2030, the older population (60+) in Alexandria will *double*.²

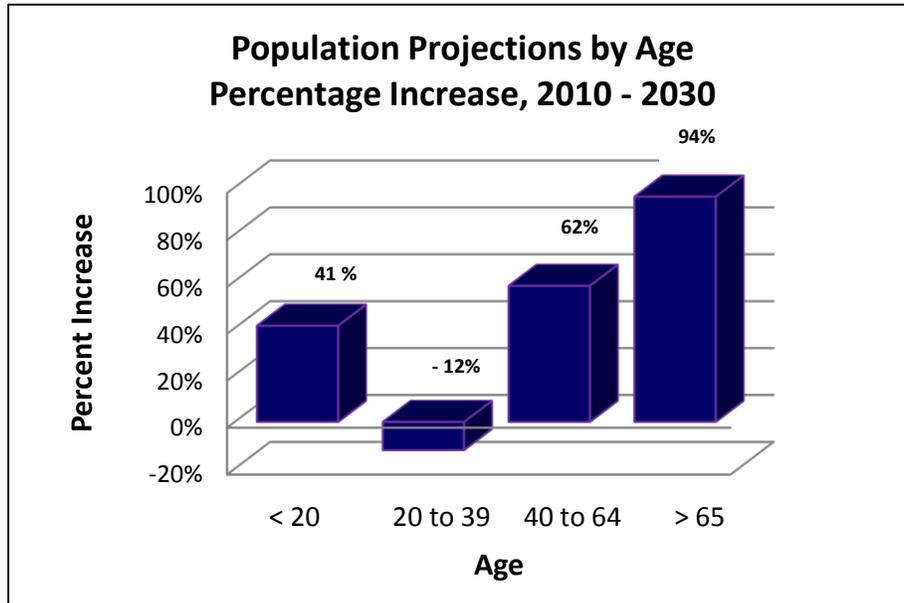


Source: Virginia Employment Commission Population Projections

A noted gerontologist points out that boomers don't just populate life stages – they transform them.³ Nor do they just reside in communities – they can help to strengthen them. Successive generations of seniors will be healthier, remain civically engaged longer, and have considerable spending power. As the graph on the next page shows, seniors are the fastest growing natural resource in Alexandria!

² It should be noted that demographic forecasting for Alexandria is made cautiously. As pointed out by the Department of Planning and Zoning, "The cohort survival methods that may work to some extent for the region as a whole may not be useful for forecasting age cohorts within the City, which has a specialized role in the region's housing stock and labor market." Written communication, 4.25.11.

³ http://www.agewave.com/media_files/commonGround.pdf, accessed 4.10.11.



Source: Virginia Employment Commission Population Projections

Alexandria as a Leader in Planning for Aging

In 2010 the City of Alexandria took leadership in anticipation of the growth in its older population by authorizing the development of a five-year Strategic Plan on Aging (hereafter referred to as the “Strategic Plan” or the “Plan”). By way of contrast, a survey by MetLife revealed that less than half of the 10,000 local governments it surveyed were prepared to address the needs and tap the potential of their growing older populations.⁴ A 2009 survey by the Older Dominion Partnership found that only about half of local officials were aware of data about the aging of their community.⁵ JustPartners, Inc. (JPI), a Baltimore-based consulting group with experience in Virginia and nationally in the promotion of “age-inclusive communities,” was selected to support the City in the development of this Strategic Plan.

While this Plan will contribute to the City of Alexandria becoming increasingly “senior-friendly,” the Division of Aging and Adult Services (DAAS) has already taken two critical steps to improve local understanding of the demographic changes. It created a group of Aging Liaisons from City Departments to enlist stakeholders throughout local government. These Liaisons represent an important bridge between DAAS and the many other governmental arenas where decision-making will need to take into account the growing older population. It

⁴ *The Maturing of America: Getting Communities on Track for an Aging Population*, http://www.aginginplaceinitiative.org/storage/aipi/documents/maturing_of_america_reformatted_for_printing.pdf, accessed 3.29.11.

⁵ *Virginia’s Four-Year Plan for Aging Services*, 2009:20.

has also created a Strategic Plan Advisory Group of representatives from various local sectors, age group interests, and issue constituencies for the purpose of information exchange and the exploration of collaborative opportunities. Along with the Commission on Aging, these new groups are becoming champions for creating a senior-friendly community that is also a livable community for *all* ages because they are positioned to recognize shared interests, overlapping concerns, and common aspirations across Alexandria’s age groups and other constituencies. Such a perspective is necessary for these challenging times.

The demographic changes facing Alexandria occur within the context of concerns about growth in government spending and the ability to sustain promises already made. Indeed, the June 2010 Alexandria City Council Strategic Plan noted:

“... in the five years since the last {City} strategic planning effort concluded, much has changed. The national economic downturn has caused decline in the City’s financial condition. The pace of residential and commercial development is now only a fraction of that experienced a few years earlier, and the City’s ability to afford and deliver critical services in a changed fiscal environment dominates public discussion. Changes in conditions compel changes in strategy.” (p.4)

The changes in strategy with which DAAS and JPI approached the development of this Strategic Plan include the following:

1. The Plan takes into account the constraints on fiscal resources experienced by today’s local, state, and federal governments.
2. The Plan is shaped by the aspiration of creating a “livable community *for all ages*” (described in Chapter 2) so that all ages can benefit from strategies that support seniors.
3. The Plan strives both to align with, and offer concrete ideas to build out, the Strategic Plan of the City Council of Alexandria and other local strategic plans. In this way, organizational energies and resources can be maximized.

A brief description follows to position this Plan in the context of what is happening across the nation and in our state.

The National and State Context

The aging of the U.S. population, including Alexandria's, is one of the key social forces of the early twenty-first century. Since the start of 2011, *each day* 10,000 baby boomers turn 65.⁶ By 2030 the number of older adults in the U.S. population will have *doubled* to 71.5 million,⁷ and one in every 5 Americans will be over 65. Like the U.S. population, Virginia's older population is expected to grow dramatically between 2000 and 2030 – doubling to 1.8 million by 2030.

Baby boomers, who are the emerging generation of seniors, arrive at later life in better health and with more education than previous generations, contribute half of all U.S. consumer spending,⁸ and are interested in remaining engaged and active in the community as long as they can. More will continue to work, and they are expected to give more hours than other generations to volunteering. Communities across the nation are expanding services to current seniors to provide them with care at home when possible so that they can continue to live in the community.

In the seven decades since World War II and the baby boom, the U.S. has witnessed enormous changes in:

- our economic structure and what drives it – from an industrial society to an information and services-driven society today;
- the range of family structures and the geographic dispersal of family members (e.g., with smaller families⁹ and residential mobility across family generations), which contribute to half of today's women 75+ living alone¹⁰ and many having no family members nearby; and
- technologies to enhance personal and professional settings and individual care but many seniors and caregivers lacking skills or equipment to benefit from them.

⁶ <http://www.multibriefs.com/briefs/naaaa/NAAAA082610.php>, accessed 3.23.11

⁷ *The Maturing of America: Getting Communities on Track for an Aging Population*, http://www.aginginplaceinitiative.org/storage/aipi/documents/maturing_of_america_reformatted_for_printing.pdf, accessed 3.29.11.

⁸ *Boomers Mean Business*, AARP Bulletin, March, 2001:20.

⁹ Alexandria's average household size is only two people. http://www.city-data.com/county/Alexandria_city-VA.html, accessed 3.24.11.

¹⁰ http://www.aoa.gov/AoARoot/Aging_Statistics/Profile/2010/2.aspx, accessed 3.24.11.

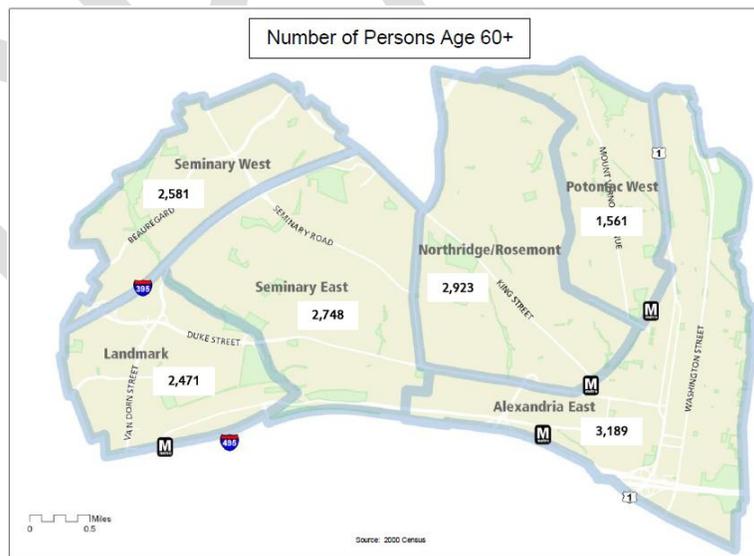
The arrival of the largest wave of the population to later life is causing social and economic challenges that impact national, state, and local governments. This emerging generation of seniors, unprecedented in numbers, is likely to:

- see the benefits and services it took for granted (e.g., Social Security, Medicare) up for political debate;
- live longer with chronic illnesses;
- watch health care, housing, and energy costs continue to rise;
- work longer due to financial need resulting from unexpected changes in (or lack of) retirement savings;
- provide support for their adult children and experience a “boomerang” effect when adult children move back home for financial reasons;
- rely more on paid caregivers (who will be more likely to speak English as a second language) if they have small families and if family members live farther away.

A Snapshot of Older Alexandrians Today ¹¹

Here is a glimpse of Alexandria’s current senior population.

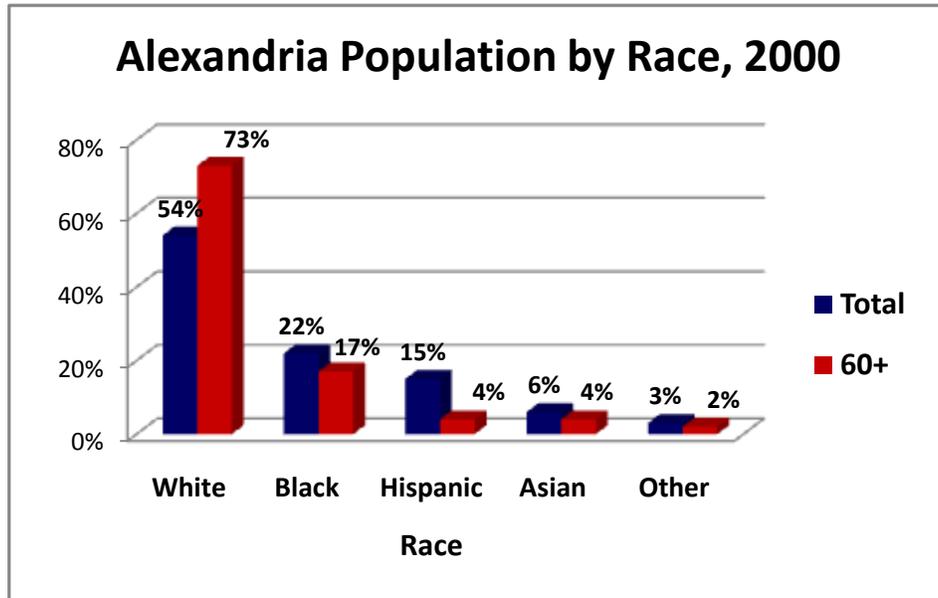
Distribution of seniors. The map below shows where persons over age 60 were living in 2000. All neighborhoods except Potomac West then housed at least 2,000 seniors, with Alexandria East showing the largest numbers (3000+).



Source: 2000 U.S. Census

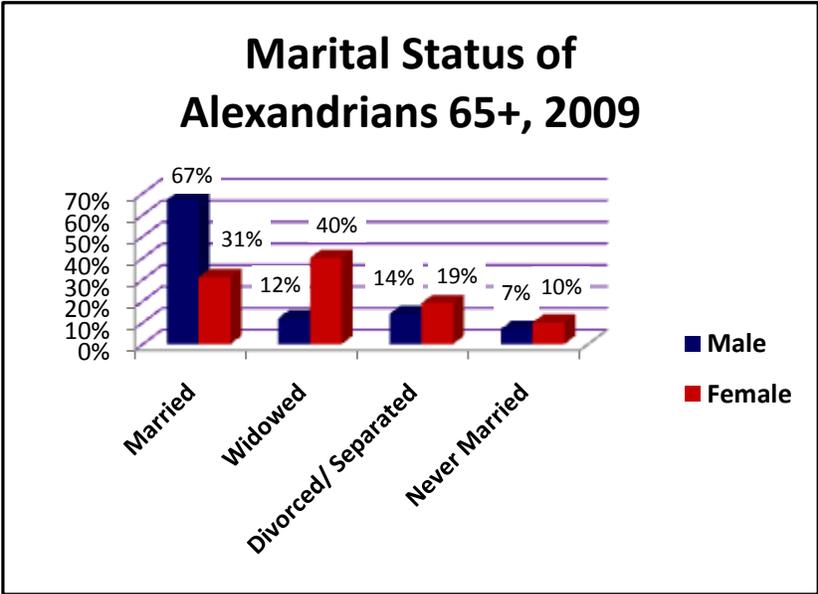
¹¹ Data provided are the latest available as of 3.24.11. These should be updated by the City when the 2010 Census data have been released for Alexandria.

Race: White (non-Hispanic) seniors made up the majority (73%) of Alexandria’s older population (age 60+) in 2000. Black seniors comprised 17% of the senior population. Successive older generations will be increasingly diverse and include more seniors with an original language other than English. Like many other cities, Alexandria’s senior population is majority White, and its school age population is comprised increasingly of children of color.



Source: 2000 U.S. Census

Marital Status: More male seniors age 65+ are married than are females, as is typical nationwide. Men tend to marry women who are younger, and men die at a younger age than women.



Source: 2005-2009 American Community Survey 5-Year Estimates

Living Arrangements: The majority of men 65+ live with family members, compared to only 11% of women 65+. A higher percentage (44%) of women 65+ live alone, compared to 23% of the men.

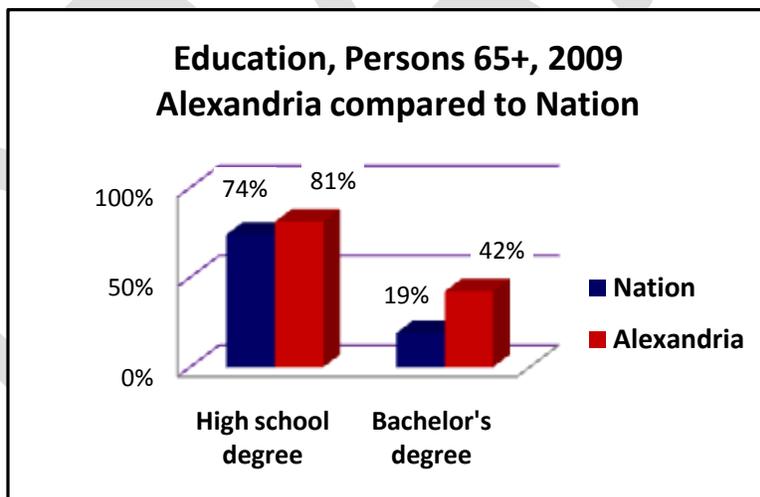
Living Arrangements, Persons 65+, 2000



Income. At \$70,400, Alexandria’s median household income is higher than both the Virginia (\$59,330) and the U.S. median household incomes (\$50,221).¹² Alexandria’s senior households (65 and over) have incomes above both the state and the national median but slightly below the local median. Yet, a focus on overall median income overlooks the fact that senior incomes reflect “a tale of two cities.” In 2000, 45% of all senior households had incomes at or below the Department of Housing and Urban Development’s (HUD) moderate income limit, which was \$46,400 for a 2-person household and lower for someone living alone.¹³ Because older women are more likely than older men to live alone, they are also more likely to have lower incomes.

Alexandria Income Data, 2010	
Age Group	Median Household Income
45 - 54	\$ 80,700
55 - 64	\$ 83,800
65 - 74	\$ 65,800
75+	\$ 62,800
All Households	\$ 70,400

Education. Alexandria seniors are better educated than seniors nationally, with 42% holding a bachelor’s degree -- over twice the national average.¹⁴



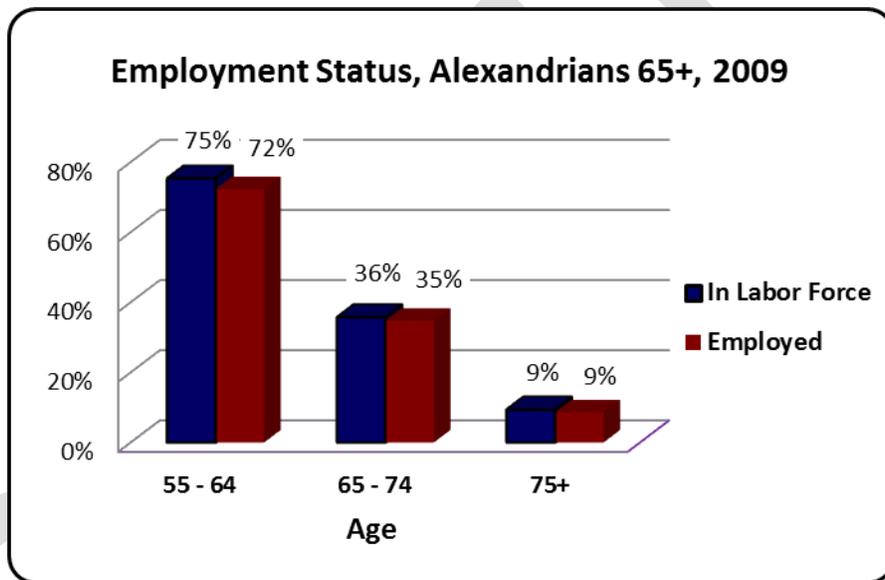
Source: 2005-2009 American Community Survey 5-Year Estimates

¹² Alexandria’s median household income is reported in <http://www.realestate.com/VA/Alexandria/local-info.aspx>, accessed 3.25.11. The U.S. and VA median household incomes are for 2009, found at <http://www.census.gov/prod/2010pubs/acsbr09-2.pdf>, accessed 3.27.11.

¹³ <http://alexandriava.gov/uploadedFiles/housing/info/section1.pdf>, accessed 3.24.11.

¹⁴ In the chart “high school degree” includes both a high school diploma and a GED.

Employment. The Alexandria area appeared to offer sufficient employment opportunities for its older population in 2009 – although today’s economy may require revision of this conclusion. At the time, most senior Alexandrians who considered themselves in the labor force had jobs: 35% of seniors aged 65-74 held jobs, as did 9% of those 75+. Still, age discrimination in employment is an ongoing concern of the senior population. Further, these data do not reflect how employment may vary by race. Nationally, Black and Hispanic workers 50+ have been hit hardest by the economic downturn and stay unemployed longer. Compounding their situation is the fact that, in general, they have been unable to save as much – or save at all -- during their working years because of lower wages. Now, if they have savings, they are tapping these reserves earlier and for longer periods than their White counterparts.¹⁵



Source: 2005-2009 American Community Survey 5-Year Estimates

Planning Opportunities and Challenges

The City of Alexandria has a number of assets and opportunities to be drawn upon when planning for aging:

- Other strategic plans in place throughout the City seek to ensure an overall quality of life for all residents, and their key focuses are amenable to specific implementation strategies to address older residents.

¹⁵ <http://assets.aarp.org/rgcenter/econ/aa-workers-11.pdf>, accessed 3.27.11.

- The City is highly supportive of health and human services, including seniors and aging services.
- Many seniors have considerable spending power, and their needs and desires open up opportunities for local economic development.
- A critical mass of highly engaged older adults has a wealth of experience, expertise, and time that is already – and can continue to be – committed to advancing the City’s well-being.

At the same time, Alexandria, like other cities, faces some identifiable challenges. These can still offer opportunities for innovation, as the Objectives later in this report demonstrate:

- The lack of affordable housing threatens local hiring potential, compromises the eco-city aspiration in terms of closer linkage between work and home, undermines the City’s valuing of diversity, and exacerbates current transportation problems.
- The City’s growing older population will create demand for moderate income health care workers and home-based aides who will also need affordable housing.
- The lack of sufficient senior independent and assisted living facilities impedes seniors’ ability to age in or near the City.
- The educational achievement of Alexandria youngsters – the next generation of workers, and future seniors -- lags behind the state, with 11% dropping out of school, although the on-time graduation rate is improving.¹⁶
- The City is seeking ways to respond to and include diverse newcomers to Alexandria, who represent at least 45 languages.

Some issues may require regional problem-solving. Fortunately, many regional organizations are available as partners. The Metropolitan Washington Council of Government’s 2010 *Region Forward* addresses what Alexandrians care about: accessibility, sustainability, prosperity, and livability. More specific to aging, Arlington County’s *Elder Readiness Plan* and Fairfax County’s *50+Plan* recognize similar planning challenges, some of which could be addressed through cross-jurisdictional collaboration, resource-sharing, or regional recruitment of service providers. Further, the Northern Virginia Aging Network’s (NVAN) coordination of legislative

¹⁶ <http://www.washingtonpost.com/wp-dyn/content/article/2010/12/18/AR2010121802566.html>, accessed 3.24.11.

priorities presents an ongoing opportunity for collective action that enriches local possibilities. NVAN has a strong track record that demonstrates how regional collaboration can advance local aspirations.

In many respects Alexandria represents the desired city of our future. Two large cohorts, baby boomers and their children, both want to live in communities that:

- favor transit-oriented growth;
- have high-density, walkable neighborhoods;
- are committed to mixed commercial-residential development;
- offer ready access to essential services and products; and
- have smaller homes available in economically vibrant and culturally rich cities.¹⁷

Alexandria has the opportunity – and the stated vision -- to offer this kind of community, a highly livable community, to diverse residents of all ages. This Strategic Plan on Aging contributes to that broad aspiration.

¹⁷ http://www.brookings.edu/articles/2010/11_real_estate_leinberger.aspx, accessed 3.27.11.

Chapter 2. What is a Livable Community for All Ages?

An Age-Inclusive Approach

The vision of this five-year **Strategic Plan on Aging** is the following:

Residents choose to stay in Alexandria as they age because it is a livable community for all ages.

The anticipated doubling of Alexandria’s older population between 2000 and 2030 does not simply mean that current services and supports for older residents will need to be doubled. The current generation of seniors and the upcoming boomer generation have different experiences and different expectations about later life. This Strategic Plan ensures that the City is positioned to respond to both cohorts.

As already noted, localities are faced today with bigger challenges than before and fewer dollars to address them. This context requires a different kind of thinking and different kinds of actions by governmental agencies. The Division of Aging and Adult Services (DAAS) will want to diversify its revenue sources, partner further with other localities to share resources, and collaborate with programs serving younger populations in ways that meet future demands of multiple generations, particularly in light of the fiscal environment. That’s why this Plan seeks to place aspirations for the current and future generations of seniors squarely within the context of Alexandria’s vision for *all* residents. There is much to be gained by this approach – and too much to be lost without it.

A “livable community for all ages” is one where people at any age have:

1. Access to **information** about the opportunities and services available to enhance their quality of life.
2. Affordable **housing** that accommodates physical abilities and living arrangements, in safe, healthy and vibrant neighborhoods.
3. **Transportation** options, including pedestrian-friendly streets.
4. **Community services** that promote aging at home and provide caregivers with needed supports.
5. A thriving **economy** that creates jobs and provides many community amenities.
6. A good **quality of life** through opportunities for recreation, lifelong learning, civic participation, and intergenerational and cross-cultural interaction.
7. A focus on **wellness**, with **health care** and other supports as needed.

The Goals and Objectives detailed in Chapter 4 identify strategies for ensuring these elements for seniors that, with few exceptions, can also benefit other generations.

The Multiplier Effect

This Strategic Plan on Aging is a plan for *all* Alexandrians because its effects are multiplied beyond seniors, as the chart on the next page previews. Objectives for older residents often work well for other ages, too. The optimal way to build a livable community for all ages in tight economic times is to prioritize strategies that simultaneously address more than one problem and/or serve more than one segment of the population. This Plan uses such an approach as it seeks to deliver a greater return on the investments made for seniors. Within a state of relative abundance, few communities were pressured to recognize how working in organizational or service silos reduced efficiencies and effectiveness. This Plan demonstrates how carefully chosen strategies can solve *more* than a single problem across issue areas and constituencies for local governments, organizations, and a wide range of residents. In the course of such work, coalitions typically emerge that further break down organizational silos, resources come to be shared more broadly for a greater good, and resident needs get addressed more holistically.

A 2008 needs assessment of human services in Alexandria¹⁸ revealed a strong desire by human service personnel for further collaboration and the ability to speak with a collective voice. At the same time, human services clients expressed a strong interest in improved coordination of the City services available to them. This Plan supports those aspirations and works also to encompass a wide variety of City stakeholders beyond the human services.

The vision of this Strategic Plan on Aging is compatible with, and provides ways to achieve goals in, other City strategic documents. While everything within these core City documents applies to older residents as residents of the community, different age groups and diverse populations within each age group may be differently situated with regard to specific issues of city planning. Their varying circumstances require distinct considerations, which this Plan provides, so that everyone working to achieve the City's vision from their respective vantage points can appreciate the contributions made to their own planning by addressing issues of older residents.

In addition, this Plan utilizes the work already done by the State of Virginia, federal agencies, and nonprofit organizations around emerging issues of an aging population and livable communities for all ages. In this way, Alexandria's Strategic Plan on Aging is linked to collaborative opportunities, ideas, and resources elsewhere that can readily benefit Alexandria residents and accommodate their aspirations.

¹⁸ <http://alexandriava.gov/uploadedFiles/humanservices/info/ACHSFinalNeedsAssessmentJuly2008.pdf>, accessed 3.29.11.

With this Plan, Alexandria is well positioned to take advantage of the changes underway at state and national levels.¹⁹ Virginia is developing plans to design state policy and programs for seniors using the lens of livable communities for all ages. At the national level, efforts to break down issue silos, such as coordinating housing, transportation and environmental planning, also promise opportunities for better planning with greater returns at the local level.

In short, addressing issues of aging can, and must, be a win-win proposition. The strategies needed today must do more with less. They also must draw upon the considerable talents and energy of residents and the civic commitment found within neighborhoods and local organizations. The best problem-solving approaches will confront today’s challenges with collaboration and ingenuity. This commitment guides the Strategic Plan on Aging.



¹⁹E.g., the Commonwealth of Virginia’s *Four Year Plan for Aging Services* written in 2009 and its *Blueprint for Livable Communities* currently in draft form both use the lens of a livable community for all ages. The U.S. Department of Housing and Urban Development, the Department of Transportation, and the Environmental Protection Agency are advancing coordinated housing, transportation and environmental planning.

Chapter 3. The Strategic Planning Process

The Strategic Planning process conducted by JustPartners, Inc. (JPI), in cooperation with the Division of Aging and Adult Services (DAAS), was designed to obtain a wide range of local input and information. The following steps were taken to ensure that local knowledge guided the Plan:

1. Creation of a local cross-sector **Strategic Plan Advisory Group**, whose 23 members represent stakeholders *beyond* the aging network (see Appendix C). They offered initial ideas about other constituencies' concerns that were considered throughout the Plan's development and provided valuable feedback on the initial draft of the Plan.
2. Two meetings with the 20 **Aging Liaisons** to the Division of Aging and Adult Services who work in other City Departments (see Appendix D). Their initial input about how their work would be impacted by the increase in the senior population helped to shape certain Objectives, and they provided valuable feedback on the initial draft of the Plan.
3. Meetings with the following **City officials** early in the planning process to obtain input and test initial ideas:
 - James Hartmann, City Manager
 - Mark Jinks, Deputy City Manager
 - Michelle Evans, Deputy City Manager
 - Debra Collins, Assistant City Manager
 - Bruce Johnson, Chief Financial Officer
 - James Banks, City Attorney
 - Tony Castrilli, Director of Communications
 - Cheryl Orr, Director of Human Resources
 - Farol Hammer, Director of Planning and Zoning
 - Councilwoman Del Pepper
4. **Extensive outreach to solicit community input.** Thanks to the help of DAAS's community partners, including AARP, the Commission on Aging, the Advisory Group, the Aging Liaisons, other organizations and groups, businesses, seniors and younger residents, and a promotional announcement by the Mayor, information about

scheduled town hall meetings and cards for written input were sent or otherwise distributed to:

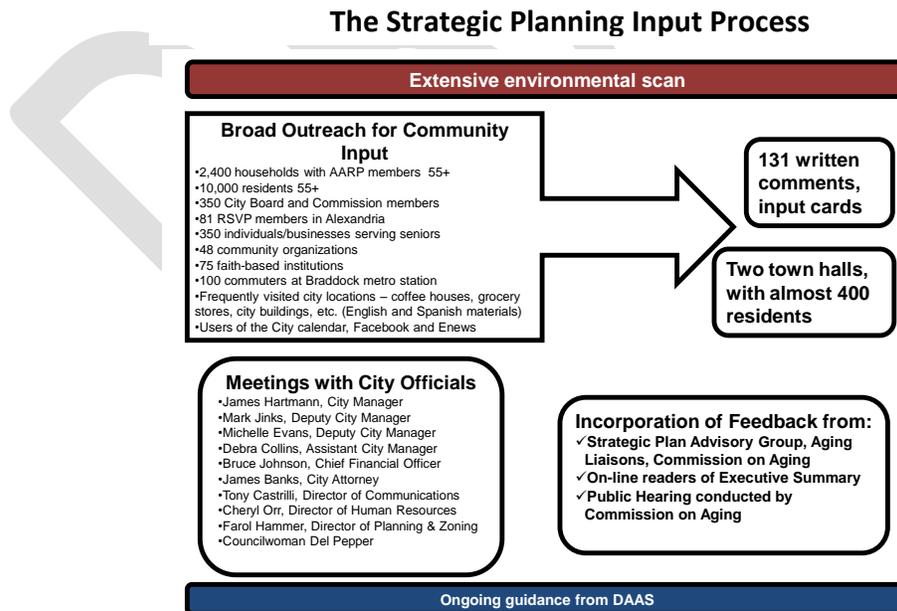
- 2,400 households with AARP members 55+;
- 10,000 residents 55+;
- 350 City Board and Commission members;
- 81 RSVP members in Alexandria;
- 350 individuals/businesses serving seniors;
- 48 community organizations;
- 75 faith-based institutions;
- 100 commuters at Braddock metro station;
- frequently visited city locations – coffee houses, grocery stores, city buildings (distributing 1000 input cards and flyers in English and Spanish); and
- users of the City calendar, Facebook and Enews.

5. **Two town halls** that attracted almost 400 participants, mostly older residents, who shared their needs and aspirations. One of the town halls was held on February 23, 2011, at the Minnie Howard Campus of T.C. Williams High School and the other on March 3, 2011, at the First Baptist Church of Alexandria. The first session attracted about 150 residents; approximately 235 residents attended the second session. The meetings opened with a greeting from Mayor William Eulle on March 3rd and Councilwoman Del Pepper on February 23rd. Jane King, Chair of the Commission on Aging, offered the charge for each event. Following an initial presentation at each session by the consulting team of JustPartners, Inc. about the framework of a Livable Community for All Ages, participants moved into smaller group discussions on transportation and safety, housing, health and wellness, community support, economic development, and quality of life.

The small groups first discussed considerations for Alexandria today and then focused on solutions for Alexandria that would: 1) advance the well-being of older residents, 2) also benefit other age groups or people with special needs, and 3) protect or support the environment, where applicable. After identifying solutions, participants then voted on the solutions they viewed as their top priorities. The voting results were shared with the full group. The final charge addressed the need for every resident of Alexandria to contribute to the city as a livable community for all ages and sought participants' ongoing commitment to the work that the Strategic Plan on Aging would generate.

6. Receipt of **100 completed input cards** distributed throughout the City and collected following town halls to obtain resident comments; receipt of an additional **31 responses through an online survey**. Town hall participants received a form for providing open-ended written comments at the conclusion of the sessions. Residents using the input card were asked about (a) priorities for maintaining a high quality of life in Alexandria in the years ahead for all ages, and (b) ways in which seniors can use their time and talents to contribute to the City. Residents who completed the online survey (using Survey Monkey) responded to the same questions as those on the input card. The survey was posted on the City website for receipt of input for six weeks, from February 9 through March 23, 2011. The input cards and survey enabled respondents to give their age. A full 65% of respondents were 60 and over, while 35% of respondents were below 60 years of age.
7. **Online posting** of a draft plan for public comment from April 11 to 22, 2011, which produced 13 written responses.
8. A **public hearing** on the draft plan, conducted by the Commission on Aging on April 25, 2011, at the Lee Center.
9. Regular communications and testing of ideas with staff from the **Division of Aging and Adult Services** and members of the **Commission on Aging**.

To complement local knowledge, an **extensive environmental scan** was undertaken of local, state, and national data, trends, strategies, and practices relevant to the Plan.



Chapter 4. Shaping the Alexandria of Our Future

In order to advance the vision that *Residents choose to stay in Alexandria as they age because it is a livable community for all ages*, this Plan proposes seven interrelated goals that must be met:

- **Goal #1. Communications and Outreach.** Information about services and programs is readily available and accessible in a variety of formats and venues for older residents of Alexandria, their families and caregivers, local organizations and businesses.
- **Goal #2. Housing.** A range of affordable, accessible and supportive housing is available that meets the needs of older residents of the City to be able to age at home.
- **Goal #3. Transportation.** A variety of mobility options, including pedestrian-safe streets, make moving in and around the City and region possible for Alexandrians of all ages and abilities.
- **Goal #4. Community Services.** Community services accommodate the expectations and needs of aging Alexandrians and support their caregivers.
- **Goal #5. Economic and Workforce Development.** The important contributions of older Alexandrians to the City's economy are recognized, and the innovative entrepreneurship of older residents is encouraged.
- **Goal #6. Quality of Life.** The quality of life of all Alexandrians is enhanced by the many volunteer activities of its older residents and their continued involvement in the social and civic life of the City.
- **Goal #7. Health, Wellness, and Safety.** All residents, with special attention to lower-income older City residents, optimize their wellness and receive the health care they require.

This Plan analyzes each Goal in light of the desire by seniors to age at home as long as possible, remain connected to the community, have appropriate services, supports, and facilities available when these are needed, and use their talents and time to enrich their lives and the lives of others. For each of the Goals under consideration, the following are provided:

- a brief review of Considerations for Alexandria Today, describing the issue;
- an inset box listing Alexandria's assets;
- a summary of community input;
- objectives and action steps to be undertaken to shape the Alexandria of our future;
- mention for each objective of other Alexandrians *beyond the older population* who would benefit from the objective's implementation; and
- a list of potential partners in the realization of the Goal.

1. Communications and Outreach

Goal #1. Information about services and programs is readily available and accessible in a variety of formats and venues for older residents of Alexandria, their families and caregivers, local organizations and businesses.

Considerations for Alexandria Today

No aspect of Alexandria life is likely to be unaffected by the anticipated growth in the senior population. Alexandria already offers seniors a variety of services, supports, and opportunities. Still, residents have expressed the need to be more informed about what already exists.²⁰ As the inset box shows, Alexandrians have several “doors” to information and referral.²¹ Data suggest that the “pull” approach of available services (i.e., information exists for those who seek it) may need to be complemented with an active “push” to get information out. Successful “push” efforts often rely on networks into which people are connected – their faith institutions, civic organizations, schools, and other community organizations and facilities – timed on a “need to know” basis. Further, to the extent that a senior-ready infrastructure within government and in public-private partnerships is created, as described in the chapter on Plan Implementation and Management, it is likely that information and referral functions will become more robust in that process. The capability to post information relevant to boomers and seniors on the home page of www.alexandriava.gov in a timely way will contribute to overall information-sharing.

The Input from Alexandria Residents

Regardless of the topic being addressed in the breakout sessions at the town hall meetings, participants invariably mentioned the need for more information about what

Alexandrians can access information and referral services through:

- ✓ Department of Community and Human Services
- ✓ Division of Aging and Adult Services
- ✓ Senior Navigator
- ✓ No Wrong Door
- ✓ Eldercare Locator
- ✓ Senior Services of Alexandria

²⁰ <http://alexandriava.gov/uploadedFiles/humanservices/info/ACHSFinalNeedsAssessmentJuly2008.pdf>, accessed 3.29.11; also mentioned in town halls and input cards.

²¹ The free Eldercare Locator listed in the inset box is a phone-based and website-based service of the U.S. Administration on Aging. Often it serves as a first step to finding resources for older adults in any U.S. community.

Alexandria already offers for seniors. It was not uncommon for residents to make specific recommendations for what to include in the Plan, only to learn from another participant or the facilitator that such services, supports, or amenities already exist in the City. Beyond the general need for accurate and timely information, some participants mentioned the need for information to be available in languages other than English and more readily available in usual settings frequented by seniors. The need for translation services was also mentioned.

The Alexandria of Our Future: Objectives and Action Steps

Objective	FY to be Completed: 2012
<p>INFO 1. An effective, robust communications and outreach plan – incorporating traditional strategies, creative ideas and modern technology – is developed that will inform, update, educate and actively refer Alexandria residents, businesses and organizations to services and programs available for older adults and their families.</p>	
<p>Action Steps:</p> <ul style="list-style-type: none"> • Designate one Division of Aging and Adult Services staff member with lead responsibility for Communication and Outreach. • Form a working group of City staff, senior and family-serving organizations, businesses and the faith community to identify previously successful outreach plans and determine ideas for successful communication and outreach on aging to an increasingly diverse older population. • Meet with City Communications and IT staff to discuss possible changes to City web structure to simplify searching for information on aging. • Finalize new edition of <i>Guide to Services for Older Alexandrians</i>. Print paper copies for distribution as well as posting on DAAS website. • Coordinate/collaborate with other Information and referral resources such as Senior Services of Alexandria, Senior Navigator, 211, and Easy Access Virginia to maximize the dissemination of information. • Utilize Facebook, Twitter, and other social media in addition to traditional methods of outreach. Engage tech-savvy youth to work with seniors who wish to develop their computer skills. • Utilizing the concierge model,²² train volunteers to visit senior residential communities, city facilities, NORCs, businesses and other community settings to provide information. 	

²² The concierge model is the customization of non-medical services and information, delivered to enable seniors to live independently.

- Support the Eco-City Alexandria Environmental Action Plan by providing information for seniors and their caregivers about appropriate disposal of medication by, e.g., using the Dispose My Meds website²³ to locate a designated pharmacy in the area.
- Develop a presence on City and Chamber of Commerce web pages designed to attract new residents.

Who Else Benefits: All community residents + potential newcomers

Potential Partners For Information Outreach:

- | | |
|------------------------|-----------------------------|
| • All City departments | • Faith organizations |
| • Workplaces | • Neighborhood associations |
| • Media outlets | • Nonprofits |
| • Health care sector | |

2. Housing

Goal #2. A range of affordable, accessible and supportive housing is available that meets the needs of older residents of the City to be able to age at home.

Considerations for Alexandria Today

Affordable housing. The ability of seniors to age at home depends on the affordability of housing. Repeated City plans note that, increasingly, moderate- and lower-income Alexandrians, as well as those on a fixed income, are being priced out of the housing market. Between 2000 and 2007, Alexandria lost 10,000 affordable rental units and 16,500 affordable ownership units. In terms of publicly assisted housing, in 2011 the wait for public housing for the elderly is over five years long, and the wait for Section 8 vouchers is over 8 years.²⁴

²³ www.disposemymeds.org, accessed 5.19.11.

²⁴ ARHA reports that 31% of its public housing residents and 39% of its Section 8 Housing Choice Voucher participants are elderly or disabled. Public housing has 170 units for the elderly and a waiting list of 364 seniors. The 1422 Section 8 vouchers are available to all ages, and 752 applicants are on the waiting list. <http://alexandriava.gov/uploadedFiles/housing/info/PriorityHousingPresentationJanuary132011.pdf>, accessed 5.21.11. Housing Master Plan presentation, January 13, 2011.

As the table below shows, Alexandria has seven senior resident facilities for independent living with a total of 1,024 units. Of these, 568 units serve lower-income seniors. A total of 456 units serve upper income seniors. None serves middle- or moderate- income seniors.

Senior housing providing independent living for middle, moderate and low income households is sorely needed. Mixed income senior housing in walkable neighborhoods near the Metro is particularly desirable.

Senior Independent Living Facilities by Income Level Served		
Facility Name	Income Level Served	Number of Units
Annie B. Rose House	Low	90
Beasley Square	Low	8
Claridge House II	Low	300
Fountains at Washington House	Upper	113
Goodwin House Alexandria	Upper	278
Hermitage	Upper	65
Ladrey Building	Low	170
Total		1,024

Accessible housing. To age at home requires environmental designs that enable independence as seniors' physical abilities change. Examples of accessibility indoors include the capability of single floor living, doorways wide enough to accommodate wheelchairs or walkers, and kitchen and bathroom facilities and appliances that are easy to reach and use. Outdoors, it could mean ramps to doorways or adaptations that support residents' varying abilities with regard to recycling and trash collection.

Trainings and checklists are available to builders and remodelers from the National Association for Home Builders (NAHB) to enable them to create accessible environments,²⁵ understand accessibility principles (known as "universal design" and "visitability") in housing construction and renovation, and become Certified Aging in Place Specialists. Accessible design features appeal to other populations as well because they are intended to make housing easier to navigate by accommodating a range of abilities and forms of mobility. For example, ramps are helpful both to people who use wheelchairs and to families with baby strollers. Home rehabilitation programs can assist with necessary modifications to enable seniors to age at home.

Adaptable housing. Seniors are enabled to age at home amidst changing family circumstances when their or others' homes can be adapted for changes such as housing a caregiver, bringing an older family member to live with an adult child, enabling a grandparent to take care of grandchildren, or accommodating an adult child who returns home to live. Zoning that allows adaptable housing can also reduce some need for new affordable housing units.

Two increasingly used forms of adaptable housing options are:

The City provides a number of supports to homeowners and renters to make housing more affordable:

- ✓ Real Estate Tax Relief and Assistance Program for Elderly and Disabled Persons
- ✓ Rent Relief Program
- ✓ Rent or Mortgage Assistance
 - Homeless Intervention Program
 - Emergency Shelter Fund
- ✓ Subsidized Housing
- ✓ Affordable Rental Set-Aside Units

Affordability also pertains to the cost of home maintenance, modification, and utilities. Again, local assistance is available:

- ✓ Utility, Heating and Cooling Assistance Programs
- ✓ Home Rehabilitation Loans
- ✓ Weatherization & Home Safety
- ✓ Rental Accessibility Modification Program (RAMP)

²⁵ <http://www.nahb.org/generic.aspx?genericContentID=75178&fromGSA=1> accessed 4.7.11.

- *Accessory Dwelling Units (ADUs)*, such as elder cottages, granny flats, and family/caregiver suites. In 2008 Arlington County approved ADUs for units inside the home only and also authorized family/caregiver suites.²⁶
- *Cohousing*, a type of intentional community composed of individually-owned private homes (houses or condos) supplemented by extensive common facilities. Cohousing can be developed within an existing neighborhood and would not need to be a legal entity unless residents owned common property.

Healthy housing. People in the U.S. spend up to 90% of their time indoors. Indoor pollution may be considerably greater than outdoor pollution, contributing to various health problems for people of *all* ages.²⁷ Healthy homes are adequately ventilated; adequately lit; adequately heated and cooled; free of excessive exposure to contaminants; free of leaks, pests, and safety hazards; and well maintained. The enforcement of housing codes, integrated pest management, the use of smoke detectors and carbon monoxide alarms, and healthy home audits followed by needed interventions can contribute to improved health for all residents of homes where improvements are made.

Knowledge about the importance of healthy homes by service providers who offer regular in-home services or volunteers who offer visitation can facilitate information-sharing and assistance to help residents create healthier homes.

Supportive care facilities. The U.S. Bureau of the Census reports that about 5% of the 65+ population ages in nursing homes, congregate care, assisted living, and board-and-care homes,²⁸ with about 4% in nursing homes at any given time. The rate of nursing home use increases with age, from less than 2% of the young seniors to almost 25% of the oldest.²⁹

The table below lists the types and numbers of senior supportive care facilities currently available in Alexandria:

²⁶ Family/Caregiver Suites can only be developed by families with children, persons with disabilities, and seniors. They can only be occupied by: 1) relatives; 2) persons providing childcare for families; or 3) persons providing services such as personal care (e.g. assistance with bathing), housekeeping, or yard work for a senior or a person with a disability. Any extra stove must be removed when the family member (e.g. an older child, a grandparent) or the caregiver moves out. Family/Caregiver Suites are cheaper to create than Accessible Dwelling Units.

²⁷ <http://www.eesi.org/high-performance-building-week-june-13-19-2010-15-jun-2010>, accessed 3.29.11.

²⁸ A nursing home houses people who require constant nursing care and need significant help with activities of daily living. A congregate care setting offers at least one communal meal per day, along with services and activities. Assisted living facilities provide help with activities of daily living, may coordinate residents' service needs, and monitor their safety and well-being. Board-and-care homes are residential facilities that offer on-site management and supervision of vulnerable or frail adults and provide meals and a range of services.

²⁹ <http://missourifamilies.org/quick/agingqa/agingqa7.htm>, accessed 3.26.11.

Senior Supportive Care Facilities		
Type	Number	
	Facilities	Units/Beds
Assisted Living	5	263
Nursing Facilities	6	643
Total	11	806

This table indicates that Alexandria needs to increase the availability of nursing home beds for the growing number of aging residents who are likely to need this level of care in later life. The expanded availability of nursing home facilities should be coupled with institutional practices known as Culture Change.³⁰ These practices advance more person-centered care, empower residents and staff, and improve staff retention in facilities for seniors. The voices of seniors and those working closest with them are honored and respected.

The following table highlights the lack of assisted living facilities for moderate- and middle-income seniors and their insufficiency for low-income seniors. In addition, three facilities in Alexandria dedicated to independent living for low-income seniors 62 and older (Annie B. Rose, Ladrey and Claridge House) currently have frail residents who need the care that an assisted living facility could provide.

A market study in 2004 commissioned and funded by Volunteers of America confirmed the need for affordable supportive accommodations for low-income seniors, as did the City's Consolidated Plan.³¹

³⁰ <http://www.vcu.edu/vcoa/vaculture.htm>, accessed 4.10.11.

³¹ Alexandria Commission on Aging report.

Facility Name	Income Level Served	Type of Facility	
		Assisted Living (Beds)	Nursing Home (Beds)
Birmingham Green, Manassas, VA ¹ (Alexandria beds)			
• Willow Oaks	Low	14	
• Nursing Home	Low		17
Fountains at Washington House (CCRC)	Upper	46	55
Goodwin House Alexandria	Upper	42	68
Hermitage	Upper	51	85
Sunrise Assisted Living of Alexandria	Upper	110	
Envoy of Alexandria	Any		111 ³
Woodbine Rehabilitation & Health Care Center	Any		307 ³
Overall Total		263	643
Total for Low Income		14	17
Total for Upper Income		249	208
Total for Any Income Level		--	418

¹ Birmingham Green, approximately 40 miles from Alexandria, is sponsored by the counties of Fairfax, Fauquier, Loudoun and Prince William and the City of Alexandria in Northern Virginia. A share of the beds is set aside for Alexandria residents.

² No units in District Home are reserved for Alexandria residents. This is an estimate of how many units are likely to be occupied by former Alexandrians.

³ These nursing homes serve adults of any age; the nursing beds in senior Continuing Care Retirement Communities such as Goodwin House Alexandria primarily serve seniors.

Models of mixed-income senior residences for Alexandria's consideration include the award-winning Mountainside Senior Living developed by the Jefferson Area Board for Aging (JABA) in Crozet, Virginia, and Chesterbrook Residences in Fairfax County.³²

If the combination of extremely high real estate prices and density standards did not apply to affordable housing for seniors, more units per lot would allow less cost per unit. Alexandria zoning and land use policy could offer attractive enticements for private investor(s) to build affordable assisted living. New assisted living projects in Alexandria would be more feasible if changes were made in floor area ratios, parking space requirements, and building height limitations. (See Appendix A for details.) The aforementioned should be achieved by zoning changes rather than the arduous and expensive option of special use permits.

The Input from Alexandria Residents

Housing was the most critical issue of concern to town hall participants, with the largest number of people choosing this breakout group in each town hall meeting. Each time, participants began the discussion by addressing the high cost of housing in the city. Homeowners discussed how rising housing costs, increasing utilities costs, and taxes are pricing seniors out of their homes. Moderate and low income individuals expressed a concern about the limited rental and utility assistance programs and recommended that income eligibility limits be raised.

Seniors expressed challenges to being able to age at home. Many participants were unaware of alternative housing options and services that could help them. For those who wanted to move, the housing options within Alexandria were viewed as limited. Some voiced a need to have their homes retrofitted and ramps installed. Others talked about the lack of creative ideas for senior housing in the city.

Participants suggested that DAAS work with developers and planners to ensure that continuing care communities, assisted living and affordable rentals are built for seniors and persons with

³² At Mountainside Senior Living, a combination of fees, local government revenue and private contributions provide subsidy sources for Auxiliary Grant (AG) residents and other persons of lower income to live among persons paying approximately 80% of market rate rents for assisted living. The latter groups' rates are calculated based on cost plus the amount needed to supplement the AG rate that runs close to \$800 below costs each month. Key contributors to success, in addition to this funding framework, are the building's amenities, a well-designed marketing strategy, community acceptance, staffing compensation, culture change features that empower residents and staff, the use of local foods and alignment with JABA. The success of the facility shows that it must be attractive to consumers at all income levels, even though it is "billed" as affordable. The full private pay resident is key to the financial sustainability of the facility. Chesterbrook is a mixed income assisted living facility which opened in 2007. Of the 97 units available, 55% are offered to low income seniors at below market rates. Contributing to its financial feasibility were the gift of five acres of land, financial support from Fairfax County and the Virginia Housing Development Authority, and more than one million dollars in private donations.

disabilities. In addition, alternative living arrangements such as co-housing were recommended. These groups suggested useful ideas such as making sidewalks level, providing transportation to and from senior communities and starting a chore service operated by younger people. Information was needed about room rentals and consumer protection regarding home repairs. Many of the solutions offered would also serve persons with disabilities. The groups proposed that all new construction be environmentally friendly.

In the written input that was received, almost all age groups, and especially those 60+, also saw the need for quality affordable housing as a priority issue. Their concerns included mention of the need for affordable utilities and lower taxes, as well.

The Alexandria of Our Future: Objectives and Action Steps

Objective	FY to be Completed : 2016
<i>Supportive housing</i>	
<p>HOUS 1. Through public/private collaboration, a mixed-income affordable assisted living facility, with at least 100 units, is available to Alexandrians of low and moderate income.</p>	
<p>Action Steps:</p> <ul style="list-style-type: none"> • Consider the changes to local zoning proposed in Appendix A in this Plan for floor area ratio, parking space requirements and building height limitations to make assisted living facilities financially feasible, especially in recognition of the need for facilities to serve lower income levels. • Seek and engage potential private sector partners. • Advocate for higher state funding for the Auxiliary Grant Program, which provides a supplement to income for qualified residents of assisted living or adult foster care. At \$1,279 a month, it is severely inadequate, since a facility must agree to accept it as full payment. • Evaluate the City’s financial relationship to Birmingham Green (aka District Home) to determine if it is the most cost-effective model for providing assisted living. • Reactivate the Affordable Assisted Living Work Group, with the leadership role located in the Office of Housing. 	
<p>Who Else Benefits: Family members and other caregivers + Job seekers + Facilities whose resources are overly stretched by the current level of Auxiliary Grant funding</p>	

Objective	FY to be Completed: 2016
<i>Affordable housing</i>	
HOUS 2. A significantly increased number of new or refurbished units that support independent living are available to older Alexandrians of low and moderate incomes.	
Action Steps: <ul style="list-style-type: none"> • Engage developers to create housing for low and moderate income seniors. • Encourage the City to identify what it can do to make Low Income Housing Tax Credit applications for Alexandria development more competitive (e.g., donate land, provide modest rent subsidy for some units, combine senior and workforce housing). • Working with the City Department of Transportation, increase support for walkable, mixed-use, transit-oriented development for aging Alexandrians. 	
Who Else Benefits: Family members + Local retailers + Construction industry	

Objective	FY to be Completed: 2013
<i>Accessible housing</i>	
HOUS 3. The City of Alexandria adopts an ordinance allowing accessory dwelling units and family/caregiver suites.	
Action Steps: <ul style="list-style-type: none"> • Review the issue and prepare recommendation for City Council. 	
Who Else Benefits: Builders + Certified Aging in Place Specialists + Local retailers	

Objective	FY to be Completed: 2012
<i>Accessible housing</i>	
HOUS 4. Older Alexandrians have easy access to information and understand about ways to modify homes to enable aging at home. Information will include universal design, home modification assistance programs, health and safety audits, tax credits and other supports available at the local, state and federal levels.	
Action Steps: <ul style="list-style-type: none"> • Coordinate this objective with Objective INFO 1. • Publicize the Virginia Livable Home Tax Credit (LHTC) program, which provides tax 	

credits for up to \$5,000 for the purchase of a new accessible residence and up to 50 percent for the cost of retrofitting existing units, not to exceed \$5,000, as of 2.1.11.

- Promote universal design and visitability by: (1) informing local builders about the Certified Aging in Place Specialist program of the National Association of Home Builders and (2) providing a brochure or web page that describes what universal design is and details the economic and safety benefits for different populations and stages of life.
- Train and mobilize volunteers (e.g., retirees, boomers, students) to undertake housing audits for seniors and younger people with disabilities who would like an assessment of accessibility design features, heating and cooling adequacy, features of healthy homes, and maintenance issues. Link this effort to home remodelers who agree to undertake needed upgrades for a “senior-friendly” fee for their products and services. Volunteers can also do repairs to address audit findings.
- Review City regulations about recycling and trash collection to ensure that they accommodate residents’ different physical abilities.
- Ensure that in-home care providers are trained to identify hazards and unhealthy conditions in senior homes and know what resources are available for correction of the conditions.

Who else benefits: Family members and other caregivers + Builders + Volunteers + Environmentalists + People with disabilities

Objective

FY to be Completed: 2013

Aging at home

HOUS 5. Recognizing the expected growth in eligibility for the **Real Estate Tax Relief and Assistance Program for Elderly and Disabled Persons**, the City evaluates its eligibility criteria and anticipated fiscal impact and plans accordingly.

Action Steps:

- Review the issue and prepare recommendation for City Council.

Who Else Benefits: All taxpayers

Potential Partners For Housing:

- ARHA – Alexandria Redevelopment and Housing Authority
- Architects
- Financial institutions
- Builders and Contractors
- National Association of Home Builders Certified Aging in Place Specialists

3. Transportation

Goal #3. A variety of mobility options, including pedestrian-safe streets, make moving in and around the City and region possible for Alexandrians of all ages and abilities.

Considerations for Alexandria Today

Transportation options. The average man will live for six years when he no longer drives, and the average woman will live without driving for ten years.³³ Lack of transportation is linked to missed doctor appointments, the inability to work or attend social activities, and caregiver time needed to provide transport.³⁴ While a number of transportation programs are available in Alexandria, some seniors are not aware of them. Eligibility requirements and destination limitations may be an impediment to use. Seniors with walkers or canes have difficulty using public transport, and public transport may be inconvenient for reaching a preferred senior destination (e.g., YMCA, senior center).³⁵

Pedestrian-friendly community. Walking is good for one's health, good for the environment, and good for community vitality. Physical activity can help older people maintain independence and enhance their overall quality of life. Even among frail and older adults, physical activity can improve mobility and functioning. Yet, one-third of U.S. seniors report no daily physical activity.³⁶ Concern for seniors of the future relates to the fact that in the leading edge of boomers, 40% are obese and 50% have high blood pressure.³⁷

Alexandria offers a variety of transportation programs for seniors, including:

- ✓ Senior Taxi
- ✓ DOT Paratransit Program
- ✓ Group Grocery Shopping Trips
- ✓ Door Thru Door
- ✓ Special Transportation Unit

³³ *Anticipating the Future*, Fairfax 50+ Action Plan, 2007.

³⁴ <http://seniortransportation.easterseals.com>, accessed 3.25.11.

³⁵ <http://alexandriava.gov/uploadedFiles/humanservices/info/ACHSFinalNeedsAssessmentJuly2008.pdf>, accessed 3.29.11. Also mentioned during town halls.

³⁶ U.S. Environmental Protection Agency, *Growing Smarter, Living Healthier*, August, 2009.

³⁷ <http://www.livescience.com/3968-cdc-older-baby-boomers-plagued-high-blood-pressure-obesity.html>, accessed 3.24.11..

Alexandria shares the honor with Arlington and Charlottesville as the “most walkable” places in which to live in Virginia.³⁸ What this overall measure does not show, however, is how pedestrian-friendly Alexandria is for seniors.³⁹

The Input from Alexandria Residents

The lack of accessible, affordable transportation was very important to attendees at the town halls and was mentioned as a need in every small group, across all topics that were discussed. Lack of transportation created a barrier to accessing service programs specifically and community activities generally. Weekend services were seen as too slow. Riders felt they have to wait a long time for services, which is especially difficult in the winter months. Participants were generally unfamiliar with existing transportation supports. They voiced a desire for discounted or subsidized taxi rides (which Alexandria offers), bus passes, volunteer drivers and bike share programs. They added that public transportation schedules need to be clearer and in larger print.

Different transportation services were suggested, including Saturday services, para-transit (also already offered), water taxis to DC, and companionship services for persons needing assistance to access transportation. Many agreed that they need more information about available resources. They felt that the City website could be updated so residents can find out about transportation programs.

Participants noted that transportation improvements will help all residents of Alexandria, especially disabled persons and single parents who rely on bus services. The more public transportation is available, the less cars are driven, and that in turn would improve the environment.

Similarly, walking was seen as a challenge in the city because it was observed that the traffic lights do not last long enough for seniors to cross the street. Too often, they said, traffic signals are ignored by drivers. One suggestion was to replace stop signs with traffic lights to prevent drivers from abusing the laws, thereby increasing the walkability of the city.

³⁸ <http://www.walkscore.com/VA>, accessed 3.25.11.

³⁹ One example of design changes that created a senior-friendly community for pedestrians comes from New York, where seniors are overrepresented among pedestrian fatalities. “Elder Districts” were designated that prescribe guidelines for street design in “elder-rich” neighborhoods. Recommended improvements included: changing pedestrian walk signals to reflect a walking speed of 2.5 feet per second; repairing streets and sidewalks to prevent falls; installing pedestrian “refuges” or medians where street widths exceed 90 feet; and installing traffic calming measures. Portland, Oregon, developed Senior Strolls and Senior Bike programs to promote active living for older adults. <http://www.epa.gov/aging/bhc/awards/2008/#portland>, accessed 3.25.11.

Participants noted that too many bikers are using the sidewalks. If bike lanes and more bike trails were available, this issue would be addressed.

The Alexandria of Our Future: Objectives and Action Steps

Objective	FY to be Completed:2012
<p>TRANS 1. Alexandrians support safe, walkable, mixed-used, transit-oriented development.</p>	
<p>Action Steps:</p> <ul style="list-style-type: none"> • Older adults are encouraged to support such design. <p>Each year, the Alexandria Commission on Aging will invite a representative from the Department of Transportation and Environmental Services for an update on progress on goals relevant to the needs of older adults.</p>	
<p>Who Else Benefits: All Alexandrians</p>	

Objective	FY to be Completed: 2013
<p>TRANS 2. A cost-benefit analysis of a range of transportation options for seniors is undertaken, and the best strategies are implemented. Options for consideration include:</p>	
<ul style="list-style-type: none"> • Increase the supply of specialty van transport services. • Expand availability of Senior Taxi (e.g., add evening and weekend hours, add destinations, pilot a coupon discount program). • Determine if the additional DASH buses planned for BRAC-133 rush hour can be put into service during other hours for shared availability across the human services. • Investigate the option of using transportation vouchers for older adults to ride the bus or train, take a cab, or even pay friends or a family member for a ride. • Consider the model of the Independent Transportation Network (ITN), which allows older people to trade their own cars for transportation credits and enables volunteer drivers to accumulate credits themselves or convert them into a fund for low income riders. 	
<p>Action Steps:</p> <ul style="list-style-type: none"> • Identify appropriate partners to undertake the cost-benefit analysis. • Implement the best identified solutions. 	
<p>Who Else Benefits:</p>	

- Family members and other caregivers
- Retailers

Objective

FY to be Completed: 2012

TRANS 3. Volunteers (e.g., retirees, boomers, students) are utilized to conduct **walkability and accessibility audits** of Alexandria and local facilities and make recommendations for changes to enhance the experience of seniors and younger people with disabilities (e.g., increase the safety of sidewalks with pavers, improve navigability in parks).

Action Steps:

- Identify and train a volunteer group to take the lead to perform the audits.
- Identify where improvements can be made and share that information with the Chamber of Commerce and appropriate City agencies.
- Issue a “senior-friendly” seal to those businesses and public places scoring well in the audit.

Who Else Benefits: All pedestrians + Businesses + Volunteers + Younger people with disabilities

Potential Partners For Transportation Options:

- DASH Bus
- MetroAccess
- Taxi Industry
- Senior Taxi
- WMATA – Washington Metropolitan Area Transit Authority

4. Community Services

Goal #4. Community services accommodate the expectations and needs of aging Alexandrians and support their caregivers.

Considerations for Alexandria Today

Home-based services. As seniors and their homes age, the right services and products can increase their ability to remain safe at home throughout the later years. These resources include hired assistance, professional care coordination, design modification, and technological advances that can supplement staff and family support. The objectives of a home-based focus are to minimize risk, maintain function and independence, assist family caregivers, prevent institutionalization if possible and provide less costly, quality care.

The home-based service industry offers an array of business development opportunities as a heightened effort is made to reduce facility-based admissions and readmissions, lengths of stay in facilities decrease, and less time is spent in hospitals and nursing homes.

In addition to the “tried and true” set of residential-based services -- nursing care, personal care, housekeeping, and home repair -- new offerings include valet transportation, downsizing assistance, care coordinators, and many more. An emerging model is that of senior “villages,” organizations designed to help seniors age at home. In most cases accessing village services requires paid membership. Through volunteers and paid staff, villages provide information and coordinate access to affordable services such as transportation, social activities, dog walking and simple home maintenance for a fee.⁴⁰

⁴⁰ As of 2011 there was one such village in Alexandria: At Home in Alexandria! (AHA!).

Alexandrians have the following resources to support caregivers:

- ✓ Alexandria Adult Day Services Center (ADSC)
- ✓ ADSC Caregiver Support Program
- ✓ Northern Virginia Ombudsman Program
- ✓ Department of Community and Human Services
- ✓ Division of Aging and Adult Services
- ✓ Regional Older Adults Facilities Mental Health Support Team (RAFT)
- ✓ Volunteer Guardianship Program
- ✓ Meals on Wheels
- ✓ Liquid Nutrition
- ✓ In-Home Companion
- ✓ Senior Services of Alexandria

Major challenges exist, nonetheless – a sufficient labor force, better training for all paid and non-paid caregivers, affordability, adequate insurance coverage and payments, and consumer and family awareness, to name the most obvious. The goal is for reliable care at home to be within the reach of all those who want to age at home safely and with dignity.⁴¹

Caregiver supports. About two-thirds of older people aging at home with chronic disabilities receive only informal care from family or friends.⁴² Almost half of the workforce expects to provide care for a senior family member in the coming five years.⁴³ Providing care can exact a high cost. Family members commonly face health risks, financial burdens, emotional strain, workplace conflicts, and retirement insecurity. The value of respite care cannot be overstated, as oftentimes it prevents caregiver burnout and avoidable institutionalization.

Beyond roles for local government and nonprofits in terms of caregiver supports, employers who offer respite care services to employees minimize the loss of workplace productivity and job termination.⁴⁴ With more households relying on dual incomes, job loss can have serious financial implications while also leaving employers without valued employees. AT&T's award-winning Work and Family Program is a pioneer in corporate eldercare.⁴⁵ Community members can help support caregivers, as well, as programs such as Legacy Corps⁴⁶ demonstrate.

Sometimes seniors themselves are the caregivers, both for other elders and children. A growing number of grandparents care for grandchildren in the absence of the ability of the middle generation to do so. This arrangement is an especially important and cost-effective option for reducing the number of children in foster care and keeping families together, even when the middle generation is absent.

The Input from Alexandria Residents

⁴¹ In Arlington, an alternative to building an assisted living facility is to offer a broad array of services at a senior independent living facility. A key service is its nursing case management program. The County program provides home visits to adults with multiple chronic conditions who are unable to manage their own care and live in their own homes. Medication management is a critical part of the service. A physician's referral is required.

⁴² *National Long Term Care Survey, 1999.*

⁴³ http://familiesandwork.org/site/research/reports/elder_care.pdf, accessed 3.25.11.

⁴⁴ Ten percent of women in the US workforce are forced to quit their jobs due to eldercare responsibilities.. http://www.caregiving.org/data/Evercare_NAC_CaregiverCostStudyFINAL20111907.pdf, accessed 3.29.11.

⁴⁵ http://www.indiana.edu/~busx420/HRMWebsite/hrm/articles/benefits/att_ben.pdf, accessed 3.29.11.

⁴⁶ Legacy Corp is a groundbreaking caregiver respite program based on intergenerational support. One California affiliate, for example, trains multigenerational service teams of youth and their older adult mentors to provide free respite care, light household chores, and errands for family members caring for a homebound senior while also providing seniors with companionship and various enjoyable activities. <http://www.nailegacycorps.com>, accessed 3.24.11.

In the breakout group on Community Services at the town halls, a wide range of issues was discussed, including transportation, civic engagement, and learning opportunities. These particular participant concerns are discussed under those topics. The need for caregiver support was also raised, with one group spending a considerable amount of time on this issue. Persons who do not have a caregiver could use monitoring services such as friendly visitors and telephone reassurance.

In the written input received, residents 60+ put high priority on the need for home care, which relates to their desire for affordable housing. Together, these factors would enable them to remain in their homes longer as they age.

The Alexandria of Our Future: Objectives and Action Steps

Objective	FY to be Completed: 2013
<i>In-home services</i>	
SERV 1. At least one new affordable in-home service is available for seniors and/or their caregivers.	
Action Steps: <ul style="list-style-type: none"> • Implement bathing services as part of the Companion Aide program. • Research the possible expansion of the Companion Aide program to include in-home respite care, using a sliding fee scale based on caregiver income. • Consider creation of a volunteer intergenerational Legacy Corps to provide companionship to frail seniors and respite for their caregivers. • Determine the feasibility of providing information and in-home care and support services, such as nursing case management, at locations with high concentrations of senior residents, thereby creating an alternative to assisted living. • Determine if selected home-based services could be offered on a sliding scale to all seniors, so that higher fees-for-service could subsidize lower-income seniors. 	
Who Else Benefits: Families and other caregivers + Discharge planners + Service providers + Job seekers	

Objective	FY to be Completed: 2013
<i>Caregiver resources</i>	
SERV 2. Caregivers have expanded access to information, education, and resources.	
Action Steps: <ul style="list-style-type: none"> • Offer periodic conference calls for family caregivers, with part of the call focused on 	

information-sharing about available services and supports, and the remainder for Q&A.

- Encourage the City of Alexandria Human Resources department to take the lead in modeling workplace policies to accommodate family caregivers—e.g., paid sick leave for caregiving, flex-time, job-sharing, providing employees with information about local resources that assist seniors.
- Promote affordable technologies that help caregivers deliver, monitor, track and/or coordinate their loved one’s medical care.
- Create a Caregivers Blog on the Adult Day Services Center website.
- Establish caregiver information desks at libraries, staffed by older volunteers.

Who else benefits: Family members and other caregivers + Businesses

Objective

FY to be Completed: 2012

Safety and protection

SERV 3. Seniors have at least **two new types of advocates** looking out for their well-being.

Action Steps:

- Coordinate this objective with Objective INFO 1 so that more residents know how to identify need and provide help to seniors when the situation requires it.
- Work closely with Adult Protective Services staff, financial institutions, particularly banks, Social Security offices, senior advocacy groups, and the police to educate employees on how to prevent, identify, and report potential financial exploitation.
- Work closely with EMS personnel, home care providers, neighborhood associations, and others who have routine access to the homes of older residents to enable them to identify hazards, unhealthy conditions, or danger, and respond appropriately.

Who Else Benefits: Family members and other caregivers + Financial literacy providers + Insurers

Potential Partners For Community Service

Provision:

- Property management companies
- Health care and other service providers
- Businesses serving older adults
- Neighborhood associations
- Resident associations

5. Economic and Workforce Development

Goal #5. The important contributions of older Alexandrians to the City's economy are recognized, and the innovative entrepreneurship of older residents is encouraged.

Considerations for Alexandria Today

The doubling of the senior population in the years ahead is good news for business because:

- many seniors have considerable spending power;⁴⁷
- the new products and services that seniors need can create new businesses and expand existing ones;⁴⁸ and
- seniors have skills and experience that enable them to mentor young entrepreneurs and younger workers.

The aging of such a large segment of the population represents a powerful economic engine.

An intentional focus on the senior and boomer market can produce considerable local advantages beyond the obvious. For example, harnessing the support of older residents specifically for *local independent businesses* is good for the City. Unlike national companies with local outlets, spending in local businesses keeps resources within the community.⁴⁹

Making Alexandria senior-friendly to attract seniors from outside the City has economic advantages, too. Older residents comprise a hefty portion of the leisure travel market.⁵⁰ They

⁴⁷ Nationally, boomers control half of all household discretionary income.

⁴⁸ The Richmond-based Boomer Project identifies the following industries as “ones to watch” in terms of their potential to be transformed by boomer purchasing power: travel and tourism, health clubs, home maintenance and home improvement services, grandparent-friendly venues and products, personal care, beauty and apparel, financial services, and education/learning.
http://www.boomerproject.com/documents/white_papers/50_things.pdf, accessed 3.27.11.

⁴⁹ <http://sustainableconnections.org/thinklocal/why/>, accessed 3.27.11. Independent businesses in communities with Buy Local campaigns reported almost three times the revenue growth in 2010 in comparison to those in communities without such initiatives. <http://www.newrules.org/retail/news/survey-finds-buy-local-message-benefitting-independent-businesses>, accessed 3.27.11. Report of 2011 survey by the Institute for Local Self Reliance.

⁵⁰ Data show that 62% of boomers (born between 1946 and 1964) and 55% of seniors (born before 1946) took at least two domestic trips in 2006. http://assets.aarp.org/rgcenter/general/travel_trends_1.pdf, accessed 3.27.11.

can be incentivized to travel in off-seasons and mid-week when other age groups are less likely to do so. Alexandria's history, beauty, and tourist appeal all position the City well to attract the older market.

Beyond the role of older residents as consumers, they have the ability to drive new entrepreneurial ventures and create jobs – thanks to their strong credit histories and assets, management experience, and higher-than-average education.⁵¹ Experienced professionals with varied business backgrounds can provide essential technical assistance to younger persons as well as older entrepreneurs through nonprofits such as the Service Corps of Retired Executives (SCORE).⁵² Older residents can also share employment and life skills with younger workers and those seeking employment, as other communities have demonstrated.⁵³

A 2008 report⁵⁴ indicated a desire for the City to invest further in training opportunities for job seekers, including expanded training coordinated with the schools. The report said at that time, at T.C. Williams High School, over 1,800 children participated in Free or Reduced Price Lunch, but only 120 students were enrolled in a subsidized work experience program. This gap provides the opportunity to create a defined track, from high school to higher education to a career, that responds to the need for health care and other services and products by the increasing senior population in Alexandria. Attention should be given to English language instruction, since some of tomorrow's workers are likely to speak English as a second language, and many seniors may only speak English. The increasing diversity of the aging population will make bilingual health care workers very competitive.

⁵¹ <http://www.slate.com/id/2278383?wpisrc=newsletter>, accessed 3.24.11.

⁵² <http://www.score.org/index.html>, accessed 3.28.11.

⁵³ In the Bronx, NY, a successful worker-owned home care agency employs 600 direct-care workers, using targeted recruitment and enhanced entry-level training for promising low-income candidates who seek more secure or meaningful employment. It offers guaranteed employment to those who graduate and has enhanced the status of home health care by positioning it as a career track and valued work. <http://www.directcareclearinghouse.org/download/CHCACaseStudy.pdf>, accessed 3.27.11. In San Diego a non-profit and training organization offers a Senior Mentor Program that matches older adult mentors with people currently enrolled in CalWORKS (California Work Opportunities and Responsibility to Kids). Its goal is to help participants obtain and retain employment. Mentors guide individuals and families toward self-sufficiency through strengthening participants' life and employment skills and connecting them to available community resources and supports. http://hhsa-pg.sdcounty.ca.gov/CalWORKS/SpecialNotices/SN_11-03_Senior_Mentoring_Program.htm, accessed 3.27.11.

⁵⁴ <http://alexandriava.gov/uploadedFiles/humanservices/info/ACHSFinalNeedsAssessmentJuly2008.pdf>, accessed 3.29.11.

Alexandria should consider “rolling out the red carpet” for migrating retirees and make an active effort to retain young government retirees, as well as veterans. They start consulting businesses, launch retail outlets and join the service sector, all adding revenue to city coffers and providing economic opportunities for other generations.

Workforce opportunities. By 2019, Americans aged 55+ will make up over 25% of the U.S. labor force. This is good news for the workplace, in that some employers perceive mature workers, compared to younger workers, to be more loyal and reliable with a lower turnover rate, a stronger work ethic, and high levels of skill. A number of innovative programs are being tested to create career pathways, in high demand sectors, for older workers seeking employment transition.⁵⁵

Yet the national unemployment rate for jobseekers 55+ more than doubled between 2007 and 2010, and 43% of older workers had been without a job for over a year. Estimates are that 5% of the employed mature workforce is involuntarily working only part-time and that in 2010 about 20% of older people not in the workforce fell into the “discouraged” category. They had ceased looking for work because they lack the necessary training for available jobs or face barriers by virtue of being older.⁵⁶

Entrepreneurship has increased for people 45+ during the recession. As already mentioned, working to their advantage is the fact that older entrepreneurs, more so than their younger counterparts, are likely to have strong credit histories, assets to tap, management experience, and more education.⁵⁷

As the senior population grows, with more older workers wanting or needing to earn income in the midst of an economic downturn, it may be difficult for the supply of jobs to keep pace with the demand by seniors for work, even the part-time work which many prefer. If national conditions hold locally, Black and Hispanic workers will particularly be affected by stagnant labor force conditions. Certain sectors of anticipated growth which may not be especially attractive to younger workers, including services for the aging, should consider the active recruitment of mature workers.

Alexandria offers several types of support for older workers:

- ✓ *JobLink*
- ✓ Senior Community Service Employment Program
- ✓ Senior Employment Services (SER)
- ✓ Microenterprise Loan Program

⁵⁵ http://www.compete.org/images/uploads/File/PDF%20Files/Regional_Economic_and_Workforce_Strategies_FINAL.pdf, accessed 3.25.11.

⁵⁶ <http://www.ncoa.org/press-room/fact-sheets/mature-workers-fact-sheet.html>, accessed 3.25.11.

⁵⁷ <http://www.slate.com/id/2278383?wpisrc=newsletter>, accessed 3.24.11.

The Input from Alexandria Residents

Town hall participants discussed employment, entrepreneurial opportunities, and marketing to seniors. Age discrimination in employment was characterized as a major problem. The group said that seniors lack opportunities to use their expertise as volunteers and employees. They prefer part time job assignments, work at home options and entrepreneurial opportunities. The inability to use technology is a secondary barrier for some seniors. Partnerships with schools and youth were offered as ways to help address this need. Some suggested that DAAS might consider working with the business community to start an “incubator” program for seniors and to stimulate jobs. Also, streamlining the business licensing process would stimulate new commerce.

Participants thought that the business community would benefit by generating products and services for the growing senior market. If they understood the buying and shopping habits of seniors, their profits could increase. For example, seniors prefer to shop between 10AM and 2PM. The Tuesday Sales Days would be more useful if parking was accessible and affordable.

Participants further offered that by encouraging residents to buy in Alexandria, the economy would be stimulated. Additionally, seniors could be encouraged to produce and use green products and services.

The Alexandria of Our Future: Objectives and Action Steps

Objective	FY to be Completed: 2014
<p>ECON 1. A high-level task force develops strategies for the private sector and the City to tap the potential of the aging population as employees, entrepreneurs, and consumers.</p>	
<p>Action Steps:</p>	
<ul style="list-style-type: none"> • Select task force membership, to include strong leadership from the business and education communities. • Utilize local data and innovative examples from other communities to identify how the City can tap the assets of seniors for economic development, including ideas such as: the creation of an “Encore Business Incubator” for older entrepreneurs and their mentoring of younger entrepreneurs to create new local businesses in areas of demand; greater access for older residents to skills such as business-essential computer literacy for re-employment or the maintenance of productivity in current work assignments; workplace flexibility features to retain valued older works (e.g., part-time work, job sharing, telecommuting); the encouragement of older consumers to “buy local.” 	
<p>Who Else Benefits: Investors + Local employers + Job seekers + Consumers + Local businesses + Local government (revenue base)</p>	

Objective	FY to be Completed: 2014
<p>ECON 2. The public high school creates modules for its curriculum, coupled with second language instruction, to attract more of the area’s young adults into health care and aging occupations, and links success in those courses to opportunities for internships and education-to-work pipelines.</p>	
<p>Action Steps:</p> <ul style="list-style-type: none"> • With school leadership, create a working coalition of educators, retired medical personnel, and workforce developers to investigate the feasibility and requirements of such a pipeline. • Begin with a pilot cohort of students to test each phase of the offering. • As applicable, link students to entrepreneurial opportunities that may emerge from Objective ECON 1. • Involve SCORE as teachers and consultants to emerging businesses. 	
<p>Who Else Benefits: Youth + Public schools + Volunteers + Local entrepreneurs and employers</p>	

Objective	FY to be Completed: 2014
<p>ECON 3. Alexandria is recognized as a prominent and desirable retirement location, especially for military and federal retirees, as measured by an increase in residents in the City receiving military or federal retirement benefits.</p>	
<p>Action Steps:</p> <ul style="list-style-type: none"> • Utilizing various modalities such as www.visitalexandriava.com, actively promote Alexandria as a desirable retirement location because of its local amenities, walkable neighborhoods, and high quality of life for seniors. • Monitor the number of military and federal retirees residing in the city to document change. 	
<p>Who Else Benefits: Local businesses and retailers + Housing industry + Local government (revenue base)</p>	

Objective	FY to be Completed: 2012
<p>ECON 4. Employees of Alexandria government, businesses, non-profits and other entities in the City understand the laws prohibiting age discrimination in employment.</p>	

Action Steps:

- The City's Office on Human Rights and the Commission on Human Rights, with the Office on Aging and Adult Services and the Commission on Aging, conduct joint outreach to educate older adults about laws prohibiting age discrimination at the workplace and the requirements for bringing cases.
- Both offices and commissions review legislative proposals and support those that can enhance the capacity of older employees to be treated justly if they are subject to age discrimination.

Who Else Benefits: Employers who understand the benefits of employing older workers + the City as a model .

Potential Partners For Economic and Workforce Development:

- Agenda Alexandria
- Council of Governments, COG
- Economic Development Authority
- Northern Virginia Regional Commission, NVRC
- Retirement Associations – AARP, MOAA, NARFE, NCOAA
- Chamber of Commerce Small Business Development Office
- Older Dominion Partnership
- Public school system
- Community colleges

6. Quality of Life

Goal #6. The quality of life of all Alexandrians is enhanced by the many volunteer activities of its older residents and their continued involvement in the social and civic life of the City.

Considerations for Alexandria Today

Recreational, social, and cultural opportunities and lifelong learning. Physical and mental health for all ages is advanced through opportunities for recreational, social and cultural activities and lifelong learning. When active aging is intergenerational, it can extract greater benefits from limited public funds and build connections across age groups that otherwise might not have existed – to the benefit of all generations (see Appendix A for examples). Intergenerational Centers are now found around the country within current senior centers, in newly constructed community centers, and housed with adult day care programs.

Boomers expect a different kind of “senior” enrichment experience than their predecessors. Instead of traditional senior centers, they show interest in multipurpose lifestyle centers, coffee houses, and other settings.⁵⁸ Service providers in aging will be challenged for a few decades to accommodate both traditional and boomer preferences in their offerings.⁵⁹

Opportunities to continue learning are important to seniors and range from education for its own sake to the development or enhancement of workplace competencies. For older residents who are able to pay, enrichment programming is offered in university settings⁶⁰ and “on the

Alexandria provides recreational, social, and cultural opportunities and lifelong learning:

- ✓ Senior Centers
- ✓ Senior Center Congregate Meals
- ✓ Alexandria Department of Recreation and Cultural Activities
- ✓ Arts for the Aging
- ✓ Libraries
- ✓ Adult Education

⁵⁸ U.S. Environmental Protection Agency, *Growing Smarter, Living Healthier*, August, 2009; http://www.ncoa.org/assets/files/pdf/101110_INNOVATIONS_FALL_2010-FR.pdf, accessed 3.27.11. Participants expect to be able to come and go all day, engage in exercise and enrichment activities, find technology-friendly space, and have intergenerational options.

⁵⁹ Organizations like the National Institute of Senior Centers tracks emerging practices that can help inform local considerations.

⁶⁰ The nearest Osher Lifelong Learning Institutes to Alexandria are at George Mason University and American University. <http://www.osherfoundation.org/index.php?olli>, accessed 3.25.11.

road” with travel opportunities.⁶¹ Community input during this strategic planning process revealed that the larger demand among respondents is for enrichment for seniors with more modest means.

For those seniors who want or need to remain in the workforce, opportunities for new skill development may be pivotal in the ability to obtain or retain a job. With technology now the routine method of information-gathering and social networking, more seniors and senior organizations are turning to youth to provide tutorials.⁶² This interaction gives youth a better sensitivity to issues of aging, the opportunity to volunteer meaningfully, and the occasion to receive mentoring in return.

Volunteer opportunities and civic participation.

The value of a volunteer’s time was estimated in 2009 to exceed \$20 per hour.⁶³ This simply reflects a wage-equivalent rather than the real value of the outcomes volunteers can create⁶⁴ – children reading at grade level, a safer neighborhood, or a cleaner environment, for example. Today’s younger seniors are the generational leaders in terms of community involvement. Older adults tend to give substantial hours through single organizations or causes and over long periods of time.⁶⁵ But nonprofits may need assistance to mobilize and retain the expanding resource of engaged seniors.⁶⁶ The time and talent of Alexandria’s older residents represent a growing natural resource for the community.

A number of paths are available for Alexandria seniors to volunteer and otherwise be engaged civically:

- ✓ RSVP (Retired and Senior Volunteer Program)
- ✓ Volunteer Alexandria
- ✓ Alexandria Mentoring Partnership (AMP)
- ✓ Meals on Wheels
- ✓ Alexandria Adult Day Services Center
- ✓ Volunteer Guardianship Program
- ✓ Long-Term Care Ombudsman Program
- ✓ Participation on City Task Forces and Commissions

⁶¹ E.g., Elderhostel (newly named Road Scholar). <http://www.roadscholar.org/default.asp> , accessed 3.25.11.

⁶² <http://online.wsj.com/article/SB10001424052748704515904576075763253410454.html>, accessed 3.27.11.

⁶³ <http://www.pointsoflight.org/current-news/independent-sector-announces-new-estimate-value-volunteer-time>, accessed 3.26.11.

⁶⁴ <http://www.energizeinc.com/art/abeso.html>, accessed 3.26.11.

⁶⁵ *Virginia’s Four-Year Plan for Aging Services*, 2009.

⁶⁶ <http://philanthropy.com/free/articles/v17/i17/17004201.htm>; accessed 3.29.11. The best return on investment when using volunteers in leadership roles comes from deploying self-directed teams, providing

The Input from Alexandria Residents

At the town halls, participants felt the need for more publicity about recreational and social activities around the City. The perceived lack of communication about services was discussed at length. Specifically, a monthly newsletter was recommended which lists all of the activities by age group. Some felt that quality of life could be improved by being aware of what the city *already* offers. They recommended a calendar of events (which the City is currently implementing), neighborhood newsletters, a 24-hour voice mail box, and announcements in bulletins of faith organizations. They proposed that community centers such as libraries are a great place to share community information. Others expressed that the expansion of existing programs might save money.

Seniors at the town halls underlined that they want their voices to be heard. They stated the desire for senior representation on local commissions and boards and pointed out that adequate transportation facilitates attendance at evening meetings. Starting a Grey Panthers chapter was recommended, and some attendees stated that they should march on City Hall to advocate for themselves.

It appears that participants stay abreast of what is happening in the surrounding counties. It was suggested that Alexandria adopt some practices that neighboring locales offer. For example, they highly recommended improving adult day centers and senior centers using a model from Fairfax County. Some suggested replicating the Arlington County Learning in Retirement Institute.⁶⁷ They felt that using existing facilities would minimize expenditures and lead to more interaction among the generations.

With the written input, respondents below the age of 60 tended to equate quality of life with City vitality. They prioritized the importance of the city's physical structure and environmental quality in keeping Alexandria a good place to live. Matters like clean and safe streets, green space, and coordinated housing and transportation development were mentioned. But on the specific question of how seniors might use their talents and skills in the community, all age groups recognized that seniors can play important roles in terms of volunteering, engaging in community projects, and providing leadership. In many instances specific mention was given to the importance of mentoring children and youth and tutoring in the schools. Beyond that,

meaningful levels of responsibility and autonomy, and enabling these volunteers to mentor others. Meaningful work is essential for retention of such volunteers – they seek impact, flexibility, and challenge.

[http://www.ncoa.org/assets/files/pdf/100524_RespectAbility-Final-Report_3.pdf?_utma=1.1842397425.1293557769.1293557769.1301250281.2&_utmb=1.1.10.1301250281&_utmc=1&_utmz=1.1301250281.2.2.utmcsr=ncoa.org|utmccn=\(referral\)|utmcmd=referral|utmct=/strengthening-community-organizations/community-action-volunteering/boomer-solutins-skilled.html&_utmv=-&_utmk=61667628](http://www.ncoa.org/assets/files/pdf/100524_RespectAbility-Final-Report_3.pdf?_utma=1.1842397425.1293557769.1293557769.1301250281.2&_utmb=1.1.10.1301250281&_utmc=1&_utmz=1.1301250281.2.2.utmcsr=ncoa.org|utmccn=(referral)|utmcmd=referral|utmct=/strengthening-community-organizations/community-action-volunteering/boomer-solutins-skilled.html&_utmv=-&_utmk=61667628), accessed 3.27.11.

⁶⁷ <http://arlingtonlr.web114.discountasp.net/>, accessed 5.19.11.

respondents suggested a wide array of engagement – tending community gardens, working with other seniors, and remaining politically engaged, to name a few.

Respondents over 70 saw a particular role for seniors to share their life experiences and wisdom with others. While this set of responses at first seems similar to the issue of mentoring, what stood out about these is that they suggested a more “social-emotional,” even spiritual, role for seniors apart from the instrumental role of the transference of skills such as occurs with tutoring or even mentoring.

It was not unusual for all respondents to mention the value of intergenerational activities, whether in specifics like mentoring or in more general ways like the sharing of facilities and volunteering.

The Alexandria of Our Future: Objectives and Action Steps

Objective	FY to be Completed: 2013
<i>Civic engagement</i>	
QUAL 1. City Council designates one seat on all relevant Boards and Commissions for a resident 60+ with an identified older constituency.	
Action Steps:	
<ul style="list-style-type: none"> • Identify the Boards and Commissions which would benefit from a representative 60+. • Meeting by member of Commission on Aging with Chairs of identified Boards and Commissions to discuss benefits of representation for older residents. • Submit requests to Council to approve changes in membership requirements. • Consider simultaneously recommending the inclusion of youth with an identified constituency on relevant Boards and Commissions, as a gesture of intergenerational cooperation. 	
Who else benefits: Elected officials + Boards, Commissions	

Objective	FY to be Completed: 2012
<i>Volunteer opportunities</i>	
QUAL 2. Volunteer opportunities for older adults are readily accessed and the business case for older volunteers is widely known.	
Action Steps:	
<ul style="list-style-type: none"> • Work with Volunteer Alexandria to create a category link for older volunteers. 	

- Increase the listings for volunteer opportunities within the City on the City web page.
- Determine the feasibility of posting the City’s most important issues that can benefit from volunteerism (e.g., student success, language and literacy skills) on <http://alexandria.gov/Volunteer> in order to produce a critical mass of volunteers of all ages – including older residents – to be able to show measurable improvement around the City’s key challenges.
- Develop and distribute printed material to the City, the business community, the nonprofit sector, and neighborhood associations promoting the business case and offering guidance for the use of older volunteers.

Who Else Benefits: The whole community + Nonprofit organizations

Objective

FY to be Completed: 2014

Meeting changing expectations of boomer generation

QUAL 3. Boomers’ desires are included in designing programs/events/spaces to meet their needs.

Action Steps:

- Identify best practices and successful strategies across the nation that meet the desires of boomers and other seniors for recreation, social activities, lifelong learning, and intergenerational programming.
- Determine the feasibility of utilizing existing non-traditional space, such as commercial and retail space and school facilities, for programs and events.
- Research other senior center models such as Café Plus.
- Create lifelong learning classes in a wide variety of subjects for older residents that are taught by older residents. Offer these courses to persons of all ages.

Who Else Benefits: City, through greater use of existing spaces

Potential Partners To Ensure

Quality Of Life:

- | | |
|-------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> • ACTION Alexandria • Alexandria/Arlington Cooperative Extension Service | <ul style="list-style-type: none"> • NOVA Adult Education • School District • Volunteer Alexandria • City |
|-------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------|

- Neighborhood Associations

7. Health, Wellness, and Safety

Goal #7. All residents, with special attention to lower-income, older City residents, optimize their wellness and receive the health care they require.

Considerations for Alexandria Today

Health care. Seniors can help the nation move from a disease model of health care with exorbitant costs and an institutional focus to an emphasis on prevention, wellness, health and making community-based care a priority. The Medicaid/Medicare system cannot support institutional care for the number of older adults that will be reaching later stages of life over the next 20 years.⁶⁸ The Affordable Care Act supports the shift toward wellness and prevention by changing the delivery system from one that responds to acute illness to one that focuses on the management of chronic illness. Other federal efforts that promote public transit and transit-oriented development, as well as tougher standards for toxic emissions, also work to improve individual health by reducing pollution.

Most older persons have at least one chronic condition and many have multiple conditions. Out-of-pocket health care expenditures increase with age and have grown over time.⁶⁹ The

⁶⁸In Virginia older adults comprise 11% of people receiving Medicaid services, yet drive nearly 25% of Virginia's total Medicaid spending and 50% of Medicaid spending on long-term care services. A national study found that the average total public expenditure for a recipient of home and community-based services through a Medicaid waiver (who must meet the eligibility criteria for institutionalization) was about \$44,000 less per year than for a person receiving institutional services. *Virginia's Four-Year Plan for Aging Services, 2009:20*. The national study referenced in this source is *Institutional and Community-Based Long-Term Care: A Comparative Estimate of Public Costs*.

⁶⁹. In 2006-2008, the most frequently occurring conditions among older persons were hypertension, diagnosed arthritis, all types of heart disease, cancer, diabetes, and sinusitis <http://www.cdc.gov/nchs/data/hus/hus09.pdf>, accessed 3.27.11.

incidence of disability among older adults doubles every five years after the age of 65.⁷⁰ One analysis of seniors in Alexandria⁷¹ revealed the following percentages of activity limitations: 39% disabled, but not institutionalized; 18% with mobility limitations, 17% with sensory limitations, 12% with cognitive/mental limitations, and 9% with self care limitations. It also noted the need for geriatric mental health facilities.

Prioritizing wellness and prevention at the individual and community level can produce behavioral and environmental changes that improve residents' quality of life and save considerable health care dollars. The Partnership for a Healthier Alexandria is working to engage community members and organizations to promote and preserve a healthy community.⁷² Individual behaviors account for 40% of health problems, with smoking and obesity (which affects all generations) being the biggest contributors. Among Alexandria residents, 17% smoke, 21% are obese, and 20% admit to engaging in binge drinking. Alexandria also lags behind the state in terms of residents receiving diabetic screenings.⁷³ Of 132 Virginia jurisdictions, Alexandria was in the top nine in terms of air pollution-ozone days.⁷⁴

In addition to a focus on wellness, Alexandria needs to take advantage of available resources so that residents who are able to live in settings outside of a nursing home have the option of doing so. Funds are now available to provide alternative living arrangements for persons in nursing homes through "Money Follows the Person" (MFP) Demonstration Programs.⁷⁵ The Affordable Care Act (ACA) extends the MFP demonstration through 2016.⁷⁶ The expectation is that the MFP will enable seniors to have a viable option to receive necessary healthcare in a non-institutionalized setting, thus saving the State dollars and improving health care delivery.

Inova Health System's decision to initiate a Program of All-Inclusive Care for the Elderly (PACE) in Fairfax should bode well, eventually, for low-income persons over 55 in Alexandria. It is not unreasonable to expect a successful PACE in a neighboring locality to lead to PACE expansion elsewhere in Northern Virginia for a very vulnerable sub-population-- persons meeting nursing

⁷⁰ (*Anticipating the Future*, Fairfax 50+ Action Plan, 2007)

⁷¹ <http://alexandriava.gov/uploadedFiles/humanservices/info/ACHSFinalNeedsAssessmentJuly2008.pdf>, accessed 3.29.11.

⁷² <http://healthieralexandria.org/content.aspx?id=29854>, accessed 4.7.11.

⁷³ <http://www.countyhealthrankings.org/virginia/alexandria>, accessed 3.28.11.

⁷⁴ <http://www.countyhealthrankings.org/virginia/alexandria/29>, accessed 3.28.11.

⁷⁵ While this program is limited to Medicaid enrollees, the development of transition care services should benefit other residents of nursing homes as additional community and home-based services are developed to respond to MFP client needs. Currently, 29 states, including Virginia and the District of Columbia, have implemented MFP.

⁷⁶ Under the ACA, individuals who reside in an institution for more than 90 consecutive days are now eligible to participate in the demonstration, unless those days were for the sole purpose of receiving short-term rehabilitation therapy (because those days are covered by Medicare and excluded from the MFP).

home criteria and eligible for both Medicare and Medicaid. In addition to serving this high risk group of older persons, a PACE can positively influence geriatric care of other seniors, as hospitals and community based service organizations learn strategies of multidisciplinary collaboration and evaluation that can benefit non-PACE members.

Good nutrition. Access to healthy foods improves both the quality of life and the longevity of older people⁷⁷ and prevents obesity for all generations. Local organizations, community leaders and residents can advance a local foods initiative that benefits people across socioeconomic status and reduces the environmental footprint created by the distance between farm and table. Programs that offer meals, such as schools and aging services, have an institutional power that can fuel such an effort. Appendix A offers ideas for consideration as components of a local foods system.

Safety and protection. Feeling safe and secure in one's home and community is important to the well-being of all Alexandrians – and especially to those residents who have special needs or vulnerabilities. A conservative estimate is that 14% of non-institutionalized older adults had experienced physical, psychological, or sexual abuse; neglect; or financial exploitation in the past year, according to a 2009 study.⁷⁸ Abuse and neglect of seniors is typically perpetrated by family members.⁷⁹ Alexandria has seen an increase in hoarding cases, which are generally indicative of self-neglect, and of financial exploitation.

Beyond the home, seniors can be targeted in fraudulent schemes.⁸⁰ But seniors' well-being can also be subject to problems with government rules and regulations, as a recent lawsuit by the

Senior residents have access to protection through:

- ✓ Adult Protective Services
- ✓ Link to Life
- ✓ CareRing
- ✓ Long Term Care Ombudsman Program
- ✓ Project Lifesaver
- ✓ Legal Service of Northern Virginia
- ✓ Office of Emergency Management

⁷⁷ <http://www.sciencedaily.com/releases/2010/12/101222071727.htm>, accessed 3.27.11.

⁷⁸ <http://www.gao.gov/products/GAO-11-208>, accessed 3.28.11. Physical and cognitive impairments, mental problems, and low social support among victims have been associated with an increased likelihood of elder abuse, which is in turn associated with negative effects on victims' health and longevity.

⁷⁹ http://www.ncea.aoa.gov/ncearoot/Main_Site/pdf/publication/FINAL%206-06-05%203-18-0512-10-04qa.pdf, accessed 3.28.11. While no single profile can be identified for a perpetrator, the following factors may be implicated: alcohol or drug dependence, a history of domestic violence, mental illness or dependency, personal stressors, economic pressures, and longstanding personality traits like a bad temper or a tendency to blame others for problems.

⁸⁰ <http://www.cops.usdoj.gov/files/RIC/Publications/e07042443.pdf>, accessed 3.28.11. These tend to employ salespeople who seek to gain the older person's trust and confidence, use business names that are similar to well-known organizations, and/or insist on quick decisions. The focus for such fraudulent activity centers around

AARP against the U.S. Department of Housing and Urban Development around reverse mortgages illustrates.⁸¹

In the face of a local disaster, particular consideration needs to be given to the older population.⁸² Seniors themselves, local officials, and emergency volunteers all need to anticipate the special dimensions of emergency preparedness for the older population.

The Input from Alexandria Residents

At the town halls, opportunities to exercise and socialize were seen as important contributors to wellness. Many participants indicated there are too few health and wellness programs in the city and that lack of transportation is a barrier to participating in existing activities. A lack of opportunities for intergenerational activities was also noted. To increase recreational options, participants suggested utilizing existing community resources such as T.C. Williams for gardening, exercise and culinary classes and churches and recreation centers for other social activities.

Traditional medical issues were also discussed. It was suggested that the City open more medical clinics because persons who are under-insured or lack insurance cannot afford hospital care. Others wanted a list of providers who accept Medicare and Medicaid. Likewise, they wanted information to locate geriatricians and recommended that the city provide tax breaks and incentives to attract doctors. Participants also were interested in receiving information to help them find prescription drug programs. They felt that this type of information as well as 211 services could be promoted through pharmacies and non-profit organizations.

In thinking about other generations that could benefit from their suggested objectives, attendees expressed strong interest in exercise and activities for all ages. Consequently, they believed, the city would have a reduction of automobile emissions as more residents ride bikes and walk. They also wanted intergenerational learning such as seniors teaching kids reading and teens teaching seniors to use computers. It was suggested that DAAS consider a survey to learn more about the health of seniors in the city.

prizes and sweepstakes, investments, charitable contributions, home and car repair, insurance, health remedies, travel, and confidence games.

⁸¹ <http://www.nytimes.com/2011/03/12/your-money/12money.html>, accessed 3.28.11.

⁸² Seniors' ability to shelter in place may be compromised if they require in-home care. Their ability to leave an area rapidly may be constrained by lack of any transportation, or lack of transportation that accommodates their physical circumstances. And their ability to live apart from their home if evacuation is required may be dependent on their uninterrupted receipt of benefits checks, access to pharmaceuticals, and access to new health providers who need their medical records.

The Alexandria of Our Future: Objectives and Action Steps

Objective	FY to be Completed: 2014
<i>PACE</i>	
HEAL 1. PACE, the Program for All Inclusive Care for the Elderly, expands into Alexandria.	
Action Steps: <ul style="list-style-type: none"> Collaborate with INOVA Hospital system to integrate Alexandria residents into their PACE program. Educate Alexandrians about benefits of PACE program. 	
Who Else Benefits: Family members + Caregivers + Businesses serving seniors	

Objective	FY to be Completed: 2012
<i>Community Based Services</i>	
HEAL 2. Funding from the Affordable Care Act is secured for community and home based services.	
Action Steps: <ul style="list-style-type: none"> Needs of Alexandrians for home and community based care are identified. A lead organization takes responsibility for developing a proposal and managing the federal process for grants. 	
Who Else Benefits: Family members and other caregivers + Businesses serving seniors and their families	

Objective	FY to be Completed: 2013
<i>Mental Health</i>	
HEAL 3. Appropriate urgent/emergency services are available within 25 miles of Alexandria to seriously mentally ill older adults, including acute hospitalization and crisis care alternatives.	
Action Steps: <ul style="list-style-type: none"> Collaborate with other local jurisdictions to develop cross-jurisdictional solutions. Work with NVAN if legislative change is needed. 	

Who Else Benefits: Family members and other caregivers

Objective

FY to be Completed: 2015

Good Nutrition

HEAL 4. Older adults and other residents have access to healthy, fresh foods and understand the role of nutritious foods in preserving health.

Action Steps:

- The Alexandria/Arlington Cooperative Extension Service works with the Department of Recreation and Culture and the Division on Aging and Adult Services to identify locations for additional community gardens serving lower-income, older adults.
- Older adults, who are able, work in the community gardens.
- Alexandria's farmers' markets accept food stamps.
- Nutrition information and guidelines relevant to older adults are widely available and classes are provided by the Alexandria/Arlington Cooperative Extension Service.
- An assessment is undertaken to determine the feasibility of greater use of local fresh foods in senior meals programs.

Who Else Benefits: All Alexandrians + Environmentalists

Objective

FY to be Completed : 2012

Emergency Preparedness

HEAL 5. Special needs populations within the City of Alexandria, particularly the subset of Alexandria residents with special medical needs, are defined and identified so that appropriate support is available to them in the event of an emergency.

Action Steps:

- Assist the Alexandria Health Department to identify known clients who have special medical needs.
- Advise clients with special medical needs to develop a personal preparedness plan to promote self-sufficiency for at least 72 hours following an incident.
- Serve on the task force, working with the Alexandria Health Department, to increase coordination among partner agencies to meet the needs of residents who may require special medical care/support during an incident.
- Assist the Health Department to identify resources to help City departments and other agencies meet the needs of all Alexandria residents during an incident.

Who Else Benefits: Persons with disabilities + caregivers + emergency response personnel

Potential Partners to Advance

Health And Wellness:

- Alexandria/Arlington Coopoerative Extension Service
- Alzheimer’s Association
- Alexandria Emergency Medical Service
- Caregivers’ associations
- Red Cross
- Partnership for Healthy Alexandria
- Alexandria Health Department

DRAFT

CHAPTER 5. Plan Implementation and Management

Managing the Work

The objectives have been arrayed over a five-year implementation sequence (see below) so that residents see **progress each year** on many issues while appropriate time is given for the most complex objectives to be implemented. For the objectives in the out-years, work will nevertheless need to be initiated in 2012 or 2013.

YEAR OF COMPLETION	<u>2012</u>	<u>2013</u>	<u>2014</u>	<u>2015</u>	<u>2016</u>
OBJECTIVES	INFO 1	HOUS 3	ECON 1	ECON 2	ECON 3
	HOUS 4	HOUS 5	QUAL 3		HOUS 1
	TRANS 1	SERV 1	HEAL 1		HOUS2
	TRANS 3	SERV 2	HEAL 4		
	SERV 3	QUAL 1			
	QUAL 2	HEAL 3			
	HEAL 2	TRANS 2			
	HEAL 5				
	ECON 4				

This Strategic Plan has built interest and momentum around the aging of Alexandria. New allies and newly-identified stakeholders have been brought to the table throughout the Plan’s development. In order for DAAS to maintain these relationships and to realize the aspirations Alexandria has for its older residents, the following **infrastructure** is needed:

1. **Sufficient staff support within DAAS** to implement the Strategic Plan and assure its meaningful coordination with other strategic plans of the City. The Division of Aging and Adult Services is currently structured to serve the core work of Area Agencies on Aging – planning and advocacy for seniors; providing what are now the traditional aging services and activities, with special emphasis on seniors who are low income and most at risk of being institutionalized; and providing staff support for the Alexandria Commission on Aging. In the decade ahead, DAAS will need to continue to serve these

functions well, even as these functions must be adapted to a new type of senior and a growing clientele. At the same time, DAAS must be positioned to seize tomorrow's opportunities, as described in this document. This entails continued engagement with current allies, mobilizing new allies, and helping others in Alexandria appreciate how deeply the well-being of current and future seniors is tied to the overall well-being of Alexandria today and in the future. Their work will transcend human services per se and extend into matters like the built environment and economic development. Their contribution to a livable community for all ages requires that commitment.

2. **Determination of the feasibility of creating a nonprofit, 501(c)(3) corporation** that will have the flexibility to avail itself of the many entrepreneurial possibilities spawned by a growing senior marketplace. Such business opportunities would have a triple bottom line – meeting DAAS' mission, serving a wider spectrum of older Alexandrians, and producing positive financial returns. DAAS could then choose to pursue revenue generating ventures, either on its own or in partnership with local businesses, both with existing companies as well as start-ups. It is projected that consumers will show a preference for DAAS services, knowing their purchase will simultaneously be contributing to a charitable enterprise. Within this new organization and affiliated entities it may create, DAAS can provide consulting expertise, a variety of health related services and also enter into agreements to build affordable housing. Diversifying the DAAS revenue base will supplement government funds and contribute to the financial sustainability of existing programs.
3. **Intentionality to the increasing diversity of the older population.** The expected growth in the number of older Alexandrians is coupled with the fact that this larger cohort will be more diverse in terms of language, race, and ethnicity than previous groups of seniors. Nationally, "ethno-gerontology" – the understanding of variations in the aging experience across different racial-ethnic groups -- is a growing competency. Alexandria prides itself on its cultural diversity, but language barriers experienced by immigrant populations can challenge human service workers' ability to effectively serve these clients. Seniors from 40 different countries visit Alexandria senior centers, and many patrons of these centers indicate they would appreciate paperwork assistance in their native language. A national study found that Latino older adults are less likely to access services from mainstream service providers because these are not likely to be culturally sensitive, do not have Spanish-speaking employees or materials, and senior Latinos do not know about them or have transportation to them. That conclusion is unlikely to vary significantly across other

immigrant groups where English is a second language.

Culturally aligned services are more effective services. Strong connections between majority-group senior-serving organizations and community-based organizations that are aligned to specific cultural communities can strengthen all organizations.

Consistent information-sharing between DAAS and the City's Office of Multicultural Service Initiatives is another bridge that can advance culturally aligned services for Alexandria's increasingly diverse older residents. A strengthened understanding about and responsiveness to seniors (and other generations) across cultural groups can be achieved through systematic use of a cultural alignment or equity assessment tool⁸³ in governmental decision-making. The availability of informational materials in key local languages and services that are culturally sensitive are key components of intentionality in reaching and responding to diverse older residents and their families.

4. **Extension of the DAAS Strategic Plan Advisory Group.** This group represents linkage to sectors of the City outside of the aging network, with whom relationships will need to deepen to fully realize the Goals and Objectives of this Strategic Plan. The Advisory Group participation can be expanded to include Commission on Aging members and Aging Liaison members for ongoing cross-sector information-exchange and bridge-building.
5. **A trained cadre of spokespeople** who are knowledgeable about aging issues and can constitute a Speakers Bureau to inform and mobilize residents around the implementation of this Plan. The Commission on Aging can serve as the core group for this function and can tap, among others, participants from among the Advisory Group and the Aging Liaisons.
6. **Annual progress reports from City departments and other stakeholders** who have taken the lead in the implementation of various aspects of the Plan. Each year, the Alexandria Commission on Aging, in conjunction with DAAS, should invite these entities to make a formal report to the Commission on what has been accomplished and their plans for implementation and other forms of action in the year ahead. Such planned annual convenings foster both the knowledge sharing and accountability that are crucial to collaborative movement toward a livable community for all ages.

⁸³ One such user-friendly tool, which has been tested in over 20 states is the 5-question Racial Equity Impact Analysis, <http://www.aecf.org/~media/PublicationFiles/MORE%20Newsletter%20Toolkit%20Starter%20Version5228PK%20for%20adobe.pdf>, accessed 5.22.11.

7. **Collaboration** where the aspirations of this Plan intersect with other City strategic plans. Appendix G summarizes the ways that Objectives in this Plan align with those in other City strategic plans. Collaboration around the implementation of shared aspirations will produce efficiencies for all stakeholders and demonstrate the interdependence of Alexandrians in the creation of a livable community for all ages.

Results Tracking

The template on the next page is provided to assist with the implementation of The Objectives and Action Steps. Each step of the implementation of an Objective would be identified and tracked on this form. When compiled, these forms facilitate the preparation of an annual report on the status of the Objectives and Action Steps. It is strongly encouraged that this process be automated through an electronic team site that enables information sharing and convenient member communications.

This template is fairly standard, with two exceptions:

1. It tracks the multiplier effects of change. That is, it asks implementers to keep track of the positive outcomes beyond the expressed purpose of the action. This component of the tracking process does two things. First, it encourages users to think more intentionally and systematically about how to solve more than one issue with a single strategy. Second, it provides additional information to enable advocates to make robust cases to decision makers, as the latter increasingly have to choose among competing investments in tough fiscal times.
2. It tracks changes to policies and regulations. This information shows the extent to which change becomes “hard-wired.” Hard-wiring is an important measure of sustainability.

Information from each of the Action Steps for any given Objective can be aggregated into a full report of the progress and challenges in relation to each Objective. In turn, reports from each Objective that is required to reach a designated Goal can be aggregated to identify the progress and challenges toward achieving the Goal. Finally, the progress and challenges regarding each Goal can be aggregated into an overall annual Status Report on the Strategic Plan on Aging.

Alternatively, DAAS may wish to consider other templates in use in the City for implementation tracking and reporting.⁸⁴ These can be expanded to note the multiplier effects that are core to the strategies in this Plan.

⁸⁴ E.g., <http://alexandriava.gov/uploadedFiles/planning/info/Arlandria/Arlandria%20Implementation%20Schedule%20-%20March%202010.pdf> .

Alexandria Strategic Plan on Aging

RESULTS TRACKING FORM

Objective #:

Lead:

Action Step:

Task	Responsible Party + Allies	Due Date	Date Complete	Indicators of Multiplier Effects	Changes to Policy/Regulations

(Repeat the above as necessary to capture all of the Action Steps for a specific Objective...)

Provide instructions for where, to whom, and how regularly the Tracking Form should be submitted.

Chapter 6. Beyond Year 5

The creation of a livable community for all ages is a long-term vision whose elements will change as further innovations and funding resources become available, as the international, national, and state contexts continue to shape localities, and as the City's political will and ability to mobilize stakeholders drive the pace of implementation. What is certain about the Objectives and Action Steps in this Strategic Plan on Aging is that, if implemented, they are *sustainable*. They are sustainable because they:

- have taken the future into account when plotting today's course;
- identify strategies that solve multiple issues simultaneously;
- take seriously the stewardship of all resources – human, environmental, fiscal; and
- seek common ground across constituencies through identifying the aspirations that different groups share.

This is a five-year Plan with a twenty-year horizon, grounded in the realization that some of the Objectives and Action Steps require ongoing work and others will only be realized fully beyond a five-year window. The sustainability of the approach taken by this Plan resides not only in what it can materially accomplish but also in its promotion of collaborative, bridge-building work.

At the five-year juncture, the following steps are recommended:

1. The City should undertake a comprehensive review of the results of the 5-Year Strategic Plan on Aging. Accomplishments should be posted, and the lessons learned should be incorporated into the next phase of action. A presentation should be made to City Council, and the Plan should be updated.
2. The approach this Plan encourages should be assessed. Are departments and groups working together more than before? Has this enabled more efficient and effective utilization of government revenue? Are City facilities being used more and shared more than in the past? If so, have these changes become “hard-wired” through streamlined organization, expectations for resource-sharing, cross-training, or other actions that help to sustain such change?
3. Actions that have been implemented at institutional or neighborhood levels should be reviewed in terms of their ability to influence cross-institutional and community-wide undertakings.

The results of these steps will set the course for the following five years – and beyond.

Chapter 7. A Call for Champions of All Ages

Creating a livable community for all ages requires champions of all ages from across all sectors of community life. The Objectives and Action Steps in this Strategic Plan on Aging seek to activate a wide range of agencies, organizations and residents to contribute their expertise, time, and energy to concrete change for the Alexandria of our future. That change stands to benefit everyone.

Aging is a lifelong process. What a community does for *every* generation today predicts not only how today's seniors fare, but also the prospects for tomorrow's seniors. At any age every resident has assets to share and concerns to be addressed. This Plan highlights the significant assets that Alexandria's older residents bring to shape a vibrant City. It also positions Alexandria as a caring community for those in later life who have the need for assistance and support.

The expected doubling of Alexandria's older population is dramatic in itself. Even more dramatic is the opportunity for the City to respond by committing to strategies that strengthen bonds across generations, recognize the interconnectedness of issues, and build bridges across departmental domains and constituencies. This Plan offers those strategies. And it foresees a host of champions and allies for the work ahead.

Appendices

- A. Expanded Information on Selected Aging Issues
- B. List of City Council Members
- C. List of Strategic Plan Advisory Group Members
- D. List of Aging Liaisons to City Departments
- E. List of Alexandria Commission on Aging Members
- F. List of City Staff from the Department of Community and Human Services
- G. Alignment of this Plan with Other City Strategic Plans

APPENDIX A.

Expanded Information on Selected Aging Issues

ZONING CHANGES THAT MAKE ASSISTED LIVING AFFORDABLE

Changes that could lead to new assisted living projects in Alexandria include the following:

1. Floor Area Ratio (or FAR) – Designate a uniform FAR for qualifying assisted living construction projects in all areas in which multifamily construction is allowed. For example, in Alexandria’s RA/Multifamily Zoning designation, the maximum FAR is .75, meaning that the total floor space of an assisted living building may not exceed 75% of the square footage of the land on which it is built. With the smaller load on municipal resources generated by assisted living facilities and lower number of residents requiring parking spaces in comparison to typical multifamily apartments, a larger FAR is easily justifiable for assisted living uses wherever they may be located. In areas to which Alexandria’s RCX Zoning designation applies (which includes apartments), a FAR of 1.25 is allowed.

For instance, on a one acre (43,560 sf) lot in RA zoning, an assisted living facility with 32,738 sf of floor space can be built, but 54,563 sf could be built in an RCX area – almost 67% larger. Because insufficient density is allowed in RA areas to make assisted living economically feasible, land in that zoning category is effectively excluded from assisted living development. So people who have aged in place in RA neighborhoods must move to RCX areas for long term care.

Unlike typical apartment complexes, assisted living developments have very significant operating costs and require higher density to achieve economies of scale that allow those operating costs to be recovered. So, lower density rules favor the former and preclude the latter.

2. Parking Space Requirements – Very few residents of assisted living facilities have cars. This should be reflected in the FAR and other applicable ordinances for assisted living and nursing homes. A different calculation should be used for independent living apartments based upon empirical research. In Albemarle County, lower parking space requirements per apartment in an independent senior housing apartment complex are achieved by the owner/operator agreeing to provide services that enable persons to age in place. In the case of assisted living, planning and zoning staff should determine, based on the number of beds proposed to be built, how many parking spaces are needed for visitors, vendors (including physicians) and staff, taking into account the use of mass transit, especially by staff. The likelihood that a person ready for assisted living care will be driving a car is low. Requiring underground parking as a means of

increasing density adds significantly to non-revenue generating building costs, which will be reflected in higher rents or make the building infeasible.

3. Building Height Limitations – Assuming appropriate aesthetic setbacks, multifamily height restrictions should be modified for assisted living solely in order to lower per unit costs by increasing density. In RA/Multifamily Zoning, the maximum building height is 45 feet. In RCX it is 50 feet. Both limitations effectively limit quality construction to 3 floors.
4. The aforementioned should be achieved by rule changes rather than the arduous and expensive option of special use permits.

IDEAS TO ADVANCE A LOCAL FOOD SYSTEM

Today's food system has contributed to the increased incidence of obesity and diet-related diseases. With recent produce recalls and warnings due to the outbreak of e coli and other contaminants, consumers of all ages are increasingly demanding to know about the origins and safety of their food sources. Consumers are also increasingly alarmed about large agribusiness' heavy-handed use of chemical fertilizers and insecticides for maximum crop yield.

Local food systems build a stronger, sustainable and more self-reliant community. Ideas to advance a local food system and produce benefits such as economic vitality, improved public health, ecological sustainability, social equity and cultural diversity include:

- Support for a comprehensive public/private food planning process that strengthens production, distribution and consumption of local and regional food products.
- Support for food system mechanisms that preserve diverse traditional food cultures of ethnic minority communities.
- Support for federal and state legislation that facilitates community and regional food system production.
- Establishment of local food usage goals for all nutrition/feeding programs receiving City funds, including schools, parks and recreation programs and senior meal programs.
- Creation of opportunities for food stamps to be used at farmers markets within the City.
- Identification of "food insecure" areas in the City that can benefit from improved access to supermarkets that regularly offer fresh produce.

- Conversion of vacant land, owned by the City, into vegetable gardens for tending by persons with varied health, social and economic capacities.⁸⁵

EXAMPLES OF VALUE-ADDED INTERGENERATIONAL ACTIVITIES

When active aging is intergenerational, it can extract greater benefits from limited public funds and build connections across age groups that otherwise might not have existed – to the benefit of all generations. For example:

- A student learning English can be paired with an older English-speaking adult for language practice and cultural exchange. Or, seniors with first languages other than English could offer language instruction for college students so that the next generation will have stronger language skills for the multicultural and global workplace.
- In Philadelphia an intergenerational ensemble of actors helps audiences grapple with tough community issues through improvisation and interactive techniques.
- Facilities that house activities across generations produce substantial benefits for both children and older adults. For example, preschool children involved in intergenerational programs have higher personal/social development scores than their peers not involved in such programs. Older adults who regularly volunteer with children are more optimistic, healthier, and perform better than peers on memory tests. Additionally, intergenerational sites that share expenses experience significant cost savings in the areas of personnel and rent-- by far the largest budget items for these programs.⁸⁶ An example in Fairfax is Gum Springs Glen, an apartment complex which provides affordable living to seniors with moderate incomes. It includes a Head Start program on the ground floor, providing opportunities for volunteer service and intergenerational interaction.

⁸⁵ Many of these objectives are from the publication by Jefferson Area Board for Aging in Charlottesville, VA, *Meal Programs: Feeding a Crowd with Local Foods*, written in cooperation with JustPartners, Inc.

⁸⁶Generations United, *Intergenerational Shared Sites: Making the Case*, 2006.

APPENDIX B.

List of City Council Members

Mayor William Eulle

Vice Mayor Kerry Donley

Frank Fannon

Alicia Hughes

Rob Kupricka

Del Pepper

Paul Smedberg

DRAFT

APPENDIX C.

List of Strategic Plan Advisory Group Members

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Councilwoman Del Pepper

Janet Barnett

Eileen Longstreet

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Laura Macone

Joan Dodaro

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APPENDIX G.

Alignment of This Plan with Other City Strategic Plans

City of Alexandria Strategic Plans Reviewed:

- City of Alexandria, Mayor and City Council 2004-2015 Strategic Plan, A Guide to the Future Summary, Adopted September 2004
- Alexandria City Council Strategic Plan, Adopted September 2004, Revised January 2006, Revised June 2010
- Alexandria Health Department Emergency Operations Plan, Annex K, Special Medical Needs, October 2010
- Eco-City Alexandria, City of Alexandria Energy and Climate Change Action Plan; Local Actions to Save Energy, 2012-2020
- City of Alexandria Comprehensive Transportation Master Plan, March 2008
- Consolidated Plan for Housing and Community Development, July 2011-June 30, 2015
- Consolidated Plan for Housing and Community Development, Section 6, One-Year Action Plan, July 2010-June 2011
- Alexandria City Public Schools Strategic Plan, 2010-2015

Strategic Plan on Aging Goals	Alignment with Other City Plans
<p>Goal #1. Communications and Outreach. Information about services and programs is readily available and accessible in a variety of formats and venues for older residents of Alexandria, their families and caregivers, local organizations and businesses.</p>	<p>City Council Strategic Plan rev. June 2010 Goal 5, Objective 2, Initiative 2 Goal 7, Objective 3, Initiatives 4 and 5</p> <p>Alexandria Health Dept. Emergency Operations Plan for People with Special Medical Needs, Concept of Operations, Public Information, # 3, Emergency Communications, Response, Health Dept. Actions</p> <p>Eco-City Alexandria Section 3.2.8</p>
<p>Goal #2. Housing. A range of affordable, accessible and supportive housing is available that meets the needs of older residents of the City to be able to age at home.</p>	<p>City Council Strategic Plan (2004-2009) A caring community that is diverse and affordable.....Objectives 1, 3, 4 Policy Action # 2 & # 3 Goal 3 Integrated, multimodal transportation plan.</p>

	<p>City Council Strategic Plan rev. June 2010 Goal 7, Objective 1, Initiatives 1,2,4, 5 Housing One-Year Action Plan Sections 6.1.5, 6.1.6</p> <p>Consolidated Plan for Housing and Community Development Sections 4.3.1, 4.3.2 Section 5.5 Five-Year Strategy</p> <p>Eco-City Alexandria Section 3.2.7</p> <p>Comprehensive Transportation Master Plan Pedestrian Concept Plan 2.1-2,3 Neighborhood Protection 4.4</p>
<p>Goal #3. Transportation. A variety of mobility options, including pedestrian-safe streets, make moving in and around the City and region possible for Alexandrians of all ages and abilities.</p>	<p>City Council Strategic Plan (2004-2009) Goal 3 Integrated multimodal transportation City Council Plan 2009, strategic planning goals, cross reference with Transportation Master Plan, #'s 1,3,7,11,16</p> <p>Comprehensive Transportation Master Plan Pedestrian Goals 1,2,4 Neighborhood Protection, 4.4-4.6</p> <p>Eco-City Alexandria Land Use Planning, 3.2.7</p>
<p>Goal #4. Community Services. Community services accommodate the expectations and needs of aging Alexandrians and support their caregivers.</p>	<p>City Council Strategic Plan (2004-2009) A caring community that is diverse and affordable..., Goal 5, Objectives 1,3,4</p> <p>City Council Strategic Plan rev. June 2010 Goal 7, Objective 3, Initiatives 1,2,3,6 Goal 7, Objective 3, Initiatives 4,5</p> <p>Alexandria Health Dept. Emergency</p>

	<p>Operations Plan, Section VIII, Section 2, Maintaining Independence</p> <p>Consolidated Plan for Housing and Community Development, Section 4.3</p>
<p>Goal #5. Economic and Workforce Development. The important contributions of older Alexandrians to the City’s economy are recognized, and the innovative entrepreneurship of older residents is encouraged.</p>	<p>City Council Strategic Plan rev. June 2010 Goal 1, Objective 3 Goal 5, Objective 1, Initiative 4 Goal 7, Objective 2. Initiatives 4-5</p> <p>Alexandria City Public Schools Culture of Collaboration Continuous Improvement</p> <p>Comprehensive Transportation Master Plan Objective # 16</p>
<p>Goal #6. Quality of Life. The quality of life of all Alexandrians is enhanced by the many volunteer activities of its older residents and their continued involvement in the social and civic life of the City.</p>	<p>City Council Strategic Plan rev. June 2010 Goal 5, Objective 2, Initiatives 1, 3 Goal 7, Objective 1, Initiatives 4, 5, 7 Goal 7, Objective 2, Initiatives 1, 2, 4</p> <p>Alexandria City Public Schools Strategic Objectives, 1 b.</p> <p>Eco-City Alexandria EAP 5 Environment and Health, Principle 5, Goal 4</p>
<p>Goal #7. Health, Wellness, and Safety. All residents, with special attention to lower-income older City residents, optimize their wellness and receive the health care they require.</p>	<p>City Council Strategic Plan rev. June 2010 Goal 2, all Objectives and Initiatives Goal 7, Objective 3, Initiatives 1, 2, 6</p> <p>Eco-City Alexandria EAP Principle 5, Goal 5 EAP Principle 7, Goal 5</p> <p>Comprehensive Transportation Master Plan</p>

	<p>Section 2 Pedestrians</p> <p>Alexandria Health Dept. Emergency Operations Plan for People with Special Medical Needs Purpose, Concept of Operations, Mitigation and Preparedness</p>
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This Plan draws upon the following publications from JustPartners, Inc:

Viable Futures Toolkit: Sustainable Communities for All Ages
Community Planning for Boomers
Creating a Viable Future: A Case Study of the Jefferson Area Board for Aging, Charlottesville, VA.
From Gray to Green: One Aging Organization’s Journey toward Sustainability
Feeding a Crowd with Local Foods (with JABA)
A Learning Laboratory for Bringing Generations Together
Elders as Resources for Children and Families

www.justpartners.org
www.viablefuturescenter.org

May, 2011

THE ALEXANDRIA OF OUR FUTURE
Strategic Plan on Aging, 2012-2016



The Alexandria of Our Future

A Livable Community for All Ages
Strategic Plan on Aging, 2012-2016

Executive Summary

Acknowledgements

JustPartners, Inc., expresses appreciation to the many Alexandrians who participated in the development of this Plan. In particular, we thank MaryAnn Griffin, Director of the Alexandria Division of Aging and Adult Services, and Debbie Ludington and Diana Reynoso from her staff; Jane King, Chair of the Alexandria Commission on Aging, and her colleagues; members of the Strategic Plan Advisory Group; the Aging Liaisons from the City's departments; Mayor William Euille and other elected and appointed officials who participated in discussions and town halls; Alexandria residents who offered their ideas through town halls, written input, and a public hearing; and the local organizations and volunteers who distributed information about the town hall meetings and staffed the events. Such mobilization of the community on behalf of its older residents is impressive. The Plan offered here demonstrates that a focus on the well-being of older residents can advance a livable community for *all* ages.

JustPartners, Inc. is a Baltimore-based nonprofit consulting group whose Viable Futures Center (www.viablefuturescenter.org) promotes age-inclusive communities, racial equity, and strategic solutions for tough times. Debbie Saag provided graphic design work for this document.

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Introduction

The Alexandria of Our Future *A Livable Community for All Ages*

Strategic Plan on Aging, 2012-2016

Executive Summary

The premises on which this Strategic Plan is based are that:

- *Older residents are a natural resource whose talents and contributions to the life of the City are fundamental to its health and vitality;*
- *Many attributes making a community more livable for older adults enhance its livability for all ages;*
- *Government alone cannot create the community that most older Alexandrians desire.*

Many of the recommendations in this plan address more than one problem simultaneously, suggest the engagement of many partners beyond the aging network, and meet the needs of younger residents and stakeholders as well as those who are older.

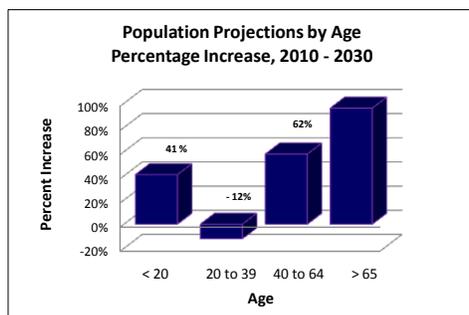
Most Americans want to stay in their own homes and communities as they age. Alexandria offers attractive features in abundance that make the desire to age at home especially compelling. Its residents are proud of their City -- its diverse and distinct neighborhoods, distinguished history, plentiful restaurants, the Potomac waterfront, many shopping areas, parks and walkable streets, access to mass transit, celebration of the arts, small town character and a reputation for resident engagement.

For Alexandria and the nation, however, changing demographics are creating the imperative to plan for an aging population that will have doubled from the year 2000 to 2030. Many among the baby boomers, whose sheer numbers have changed the nature of our society from their adolescence to their aging years, expect their communities to adjust to their longer life spans, provide a variety of choices in key areas of life, support their ambition to work or volunteer in activities that are suitable for their expertise and experience, and accommodate their desire to continue active engagement in their neighborhoods and communities for many years to come.

Planning in the City acknowledges the diversity of its residents, who represent a range of incomes, educational attainment, nationalities, and racial and cultural heritages and speak many

languages (at least 45).¹ In planning for aging residents, therefore, Alexandria must necessarily account for an extraordinary array of expectations and needs.

Fortunately, Alexandria is clearly attuned to the future. In recent years, the City Council has approved several strategic plans that incorporate innovative and comprehensive approaches to protecting the environment (the Eco-City Plan), enhancing access for all Alexandrians to a variety of modes of transportation that lessen the use of automobiles (2008 Master Plan for Transportation), creating a state-of-the art school system (Alexandria City Schools Strategic Plan 2010-2015) and developing housing that meets the needs of Alexandria’s very heterogeneous population (Housing Plan, in development). The City Council also approved a plan in 2010 that integrates many of the strategies and action steps defined in the individual plans.



Source: Virginia Employment Commission Population Projections

These plans, as they are implemented, will benefit Alexandrians of all ages and abilities. However, the City Council agreed in May 2010 that the City could not satisfactorily address the needs and aspirations of its aging residents without a closer examination of the implications for Alexandria of their rapidly increasing numbers and the transformation occurring in the meaning of later life. As have other forward-thinking communities, Alexandria’s leaders recognized that the numbers and accompanying expectations of its aging residents represent a new phenomenon in human history and authorized the development of a Strategic Plan on Aging. This Plan both complements the other City plans and seeks wherever possible to benefit Alexandria residents beyond the older population.

¹ <http://www.usefoundation.org/userdata/file/Research/Regions/virginia.pdf> 4/23/2011, accessed 5.5.11.

While their large numbers alone necessitate careful scrutiny of their impact on the community, many of the City's older residents, like their peers across the country, are healthier and more affluent and will stay active longer than prior generations. They want to stay in and give back to their communities. Their capacity to continue to serve their community as they age is unparalleled, as is their ability to contribute to its economic development.

At the same time, many older residents will need modifications to their homes to sustain their independence and will rely in their later years on modes of transportation other than the automobile. The City must accommodate and plan for those older Alexandrians who are or will be frail, disabled or ill and need in-home or institutional support, both for those who can afford to pay and those who cannot. For older Alexandrians, as for all residents, maintaining health and a good quality of life are essential goals.

While the population of Alexandria's 65-plus residents doubles, the constraints on budgets will make it impossible to double the resources available to older City residents. Alexandrians who volunteer, many of whom are older, already fill gaps in services and enhance the ability of their more vulnerable peers to continue to live independently in their homes. They deliver Meals on Wheels, provide care to older family members, support Alexandria at Home (AHA!), rehabilitate housing for Rebuilding Together, contribute to Senior Services of Alexandria and ALIVE, assist older participants in faith-based communities and volunteer for a variety of other supportive services. Their volunteerism benefits other generations, as well.

As the next section details, prior to developing this Plan, the views of a broad cross-section of Alexandria residents were solicited, to include older adults and boomers, and many stakeholders representing Alexandria government, non-profit and service organizations, faith-based institutions and business interests in the City. These views played a critical role in the determination of the Goals set forth in the Plan. To frame and supplement the views of Alexandrians, JustPartners, Inc. (JPI), completed a comprehensive scan of local, state and national data, trends, strategies and practices. Through this scan, JPI identified the experiences and approaches of other communities that contribute to an understanding of the strategic direction that will make Alexandria an especially attractive, desirable and livable community for all ages.

The vision of the Strategic Plan on Aging is as follows:

***Residents choose to stay in Alexandria as they age
because it is a livable community for all ages.***

The Plan proposes seven interrelated goals that must be met to ensure this vision.

Input for the Plan

The strategic planning process was designed to ensure that local knowledge guided the Plan. Input was obtained in the following ways:

1. Creation of, and meetings with, a diverse **Strategic Plan Advisory Group**, whose 22 members represent stakeholders *beyond* the aging network.
2. Meetings with the 20 **Aging Liaisons** to the Division of Aging and Adult Services who work in other City Departments.
3. **Extensive outreach** to solicit community input. Information about scheduled town hall meetings and cards for written input were sent or otherwise distributed to:
 - 2,400 households with AARP members 55+;
 - 10,000 residents 55+;
 - 350 City Board and Commission members;
 - 81 RSVP members in Alexandria;
 - 350 individuals/businesses serving seniors;
 - 48 community organizations;
 - 75 faith-based institutions;
 - 100 commuters at Braddock metro station;
 - frequently visited city locations – coffee houses, grocery stores, city buildings (with 1000 input cards and flyers distributed in English and Spanish); and
 - users of the City calendar, Facebook and Enews.
4. **Two town halls** that attracted almost 400 participants, mostly seniors and boomers. One was held on February 23, 2011, at the Minnie Howard Campus of T.C. Williams High School and the other on March 3, 2011, at the First Baptist Church of Alexandria. The first session was attended by about 150 residents; approximately 235 residents attended the second session. Discussions centered on transportation, housing, health and wellness, safety, community support, economic development, and quality of life.
5. Receipt of 100 completed **input cards** distributed throughout the City and collected following town halls; receipt of an additional 31 responses through an **online survey**. Residents using the input card and the online survey were asked about (a) priorities for maintaining a high quality of life in Alexandria in the years ahead for all ages, and (b) ways in which seniors can

use their time and talents to contribute to the City. The survey was posted on the City website for receipt of input for six weeks, from February 9 through March 23, 2011. Through these channels input came from 65 respondents who were 60 and over and 35 respondents who were below 60 years of age.

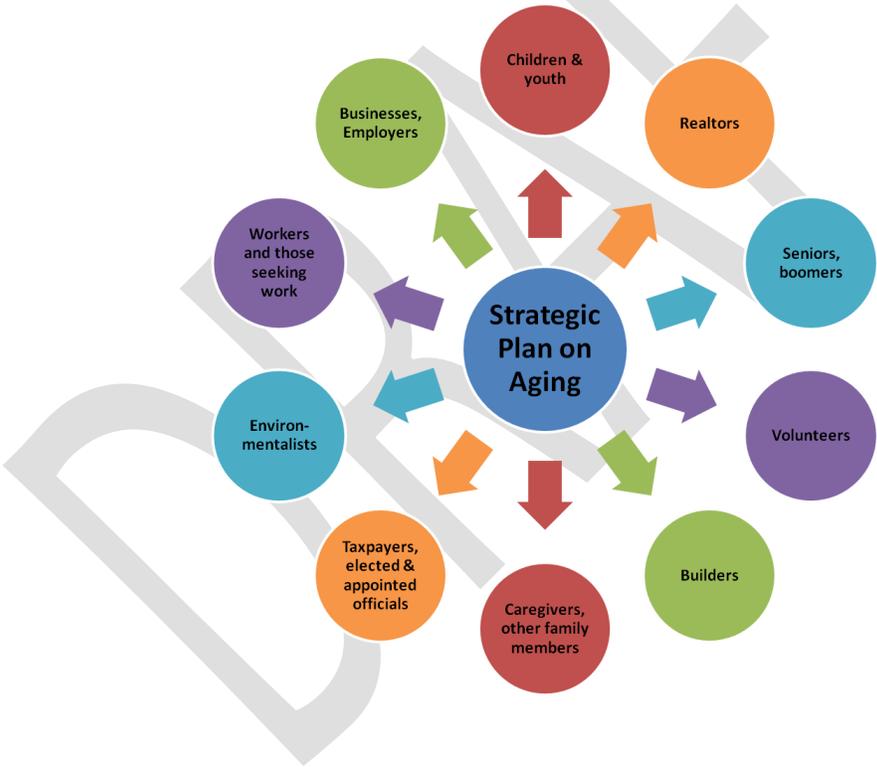
6. Meetings with ten **City officials**, both elected and appointed.
7. **Online posting** of a draft plan for public comment from April 11 to 22, 2011, with produced 13 written responses.
8. **Public hearing** on the draft plan conducted by the Commission on Aging on April 25, 2011 at the Lee Center.
9. Regular communications and testing of ideas with staff from the Alexandria **Division of Aging and Adult Services** and members of the **Commission on Aging**.

To complement local knowledge, an extensive environmental scan was undertaken of local, state, and national data, trends, strategies, and practices relevant to the Plan.

The Multiplier Effect

This Strategic Plan on Aging is a **plan for all Alexandrians** because its effects are multiplied beyond seniors. It demonstrates how carefully chosen strategies can solve *more* than a single problem across issue areas and constituencies for local governments, organizations, and a wide range of residents. The optimal way to build a livable community for all ages in tight economic times is to prioritize strategies that multiply results.

Creating a livable community for all ages requires champions of all ages from across all sectors of community life. The Goals and Objectives in this Strategic Plan on Aging seek to activate a wide range of agencies, organizations and residents to contribute their expertise, time, and energy to concrete change for the Alexandria of our future. These anticipated changes will benefit everyone, as the diagram here and the Objectives below suggest.



Steps toward the Alexandria of Our Future

In order to advance the vision that *Residents choose to stay in Alexandria as they age because it is a livable community for all ages*, the Plan proposes seven interrelated goals that must be met:

- **Goal #1. Communications and Outreach.** Information about services and programs is readily available and accessible in a variety of formats and venues for older residents of Alexandria, their families and caregivers, local organizations and businesses.
- **Goal #2. Housing.** A range of affordable, accessible and supportive housing is available that meets the needs of older residents of the City to be able to age at home.
- **Goal #3. Transportation.** A variety of mobility options, including pedestrian-safe streets, make moving in and around the City and region possible for Alexandrians of all ages and abilities.
- **Goal #4. Community Services.** Community services accommodate the expectations and needs of aging Alexandrians and support their caregivers.
- **Goal #5. Economic and Workforce Development.** The important contributions of older Alexandrians to the City's economy are recognized and the innovative entrepreneurship of older residents is encouraged.
- **Goal #6. Quality of Life.** The quality of life of all Alexandrians is enhanced by the many volunteer activities of its older residents and their continued involvement in the social and civic life of the City.
- **Goal #7. Health, Wellness, and Safety.** All residents, with special attention to lower-income older City residents, optimize their wellness and receive the health care they require.

This Plan analyzes each Goal in light of the desire by seniors to age at home as long as possible, remain connected to the community, have appropriate services, supports, and facilities available when these are needed, and use their talents and time to enrich their lives and the lives of others. For each of the Goals under consideration, the following are provided:

- a brief review of Considerations for Alexandria Today, describing the issues;
- Objectives and Action Steps to be undertaken to shape the Alexandria of our future;
- mention for each Objective of other Alexandrians beyond the older population who would benefit from the Objective's implementation; and
- a list of potential partners in the realization of the Goal.

1. Communications and Outreach

Goal #1. Information about services and programs is readily available and accessible in a variety of formats and venues for older residents of Alexandria, their families and caregivers, local organizations, and businesses.

Considerations for Alexandria Today

The scope of the challenge. All aspects of Alexandria life are likely to be affected by the anticipated growth in the senior population. All sectors need information about available resources.

Many families are affected. In addition to the need by older residents for resource information, in about 25% of all U.S. households, someone is caring for an individual 50 or older.

More resources exist than does resident knowledge about them. Town hall participants consistently mentioned the lack of knowledge of existing services as a gap to be filled.

The Alexandria of Our Future: Objectives and Action Steps

Objective	FY to be Completed: 2012
INFO 1. An effective, robust communications and outreach plan – incorporating traditional strategies, creative ideas and modern technology – is developed that will inform, update, educate and actively refer Alexandria residents, businesses and organizations to services and programs available for older adults and their families.	
Action Steps: <ul style="list-style-type: none">• Designate one Division of Aging and Adult Services (DAAS) staff member with lead responsibility for Communication and Outreach.• Form a working group of City staff, senior and family-serving organizations, businesses and the faith community to identify previously successful outreach plans and determine ideas for successful communication and outreach on aging to an increasingly diverse older population.• Meet with City Communications and IT staff to discuss possible changes to City web structure to simplify searching for information on aging.• Finalize new edition of <i>Guide to Services for Older Alexandrians</i>. Print paper copies for distribution as well as posting on DAAS website.• Coordinate/collaborate with other Information and Referral resources such as Senior	

Services of Alexandria, Senior Navigator, 211, Easy Access Virginia to maximize the dissemination of information.

- Utilize Facebook, Twitter, and other social media in addition to traditional methods of outreach. Engage tech-savvy youth to work with seniors who wish to develop their computer skills.
- Utilizing the concierge model,² train volunteers to visit senior residential communities, city facilities, NORCs, businesses and other community settings to provide information.
- Support the Eco-City Alexandria Environmental Action Plan by providing information for seniors and their caregivers about appropriate disposal of medication by, e.g., using the Dispose My Meds website³ to locate a designated pharmacy in the area.
- Develop a presence on City and Chamber of Commerce web pages designed to attract new residents.

Who Else Benefits: All community residents and potential newcomers

Potential Partners For Information Outreach:

- All City departments
- Workplaces
- Media outlets
- Health care sector
- Faith organizations
- Neighborhood associations
- Nonprofits

2. Housing

Goal #2. A range of affordable, accessible and supportive housing is available that meets the needs of older residents of the City to be able to age at home.

Considerations for Alexandria Today

Supportive care facilities. The availability and affordability of area assisted living and nursing home facilities is currently insufficient.

Affordable housing. Alexandria has seven senior resident facilities for independent living with a total of 1,024 units. None serves middle or moderate income seniors.

Accessible housing. Senior independence requires housing environments and facilities to be accessible (e.g., ramps to doors, ability to live on a single floor) as older residents' physical abilities change.

Adaptable housing. Seniors can still age at home as circumstances change (e.g., needing space for a caregiver) when zoning allows for housing adaptability.

² The concierge model is the customization of non-medical services and information delivered to enable seniors to live independently.

³ www.disposemymeds.org, accessed 5.19.11.

The Alexandria of Our Future: Objectives and Action Steps

Objective	FY to be Completed: 2016
<i>Supportive housing</i>	
HOUS 1. Through public/private collaboration, a mixed-income affordable assisted living facility , with at least 100 units, is available to Alexandrians of low and moderate income.	
Action Steps:	
<ul style="list-style-type: none"> • Consider the changes to local zoning proposed in this Plan for floor area ratio, parking space requirements and building height limitations to make assisted living facilities financially feasible, especially in recognition of the need for facilities to serve lower income levels. • Seek and engage potential private sector partners. • Advocate for higher state funding for the Auxiliary Grant Program, which provides a supplement to income for qualified residents of assisted living or adult foster care. At \$1,279 a month, it is severely inadequate, since a facility must agree to accept it as full payment. • Evaluate the City’s financial relationship to Birmingham Green (aka District Home) to determine if it is the most cost-effective model for providing assisted living. • Reactivate the Affordable Assisted Living Work Group, with the leadership role located in the Office of Housing. 	
Who Else Benefits: Family members and other caregivers + Job seekers + Facilities whose resources are overly stretched by the current level of Auxiliary Grant funding	

Objective	FY to be Completed: 2016
<i>Affordable housing</i>	
HOUS 2. A significantly increased number of new or refurbished units that support independent living are available to older Alexandrians of low and moderate incomes.	
Action Steps:	
<ul style="list-style-type: none"> • Engage developers to create housing for low and moderate income seniors. • Encourage the City to identify what it can do to make Low Income Housing Tax Credit applications for Alexandria development more competitive (e.g., donate land, provide modest rent subsidy for some units, combine senior and workforce housing). • Working with the City Department of Transportation, increase support for walkable, mixed-use, transit-oriented development for aging Alexandrians. 	
Who Else Benefits: Family members + Local retailers + Construction industry	

Objective	FY to be Completed: 2013
<i>Accessible housing</i>	
HOUS 3. The City of Alexandria adopts an ordinance allowing accessory dwelling units and family/caregiver suites.	
Action Steps:	
<ul style="list-style-type: none"> Review the issue and prepare recommendation for City Council. 	
Who Else Benefits: Builders + Certified Aging in Place Specialists + Local retailers	

Objective	FY to be Completed: 2012
<i>Accessible housing</i>	
HOUS 4. Older Alexandrians have easy access to information and understand about ways to modify homes to enable aging at home. Information will include universal design, home modification assistance programs, health and safety audits, tax credits and other supports available at the local, state and federal levels.	
Action Steps:	
<ul style="list-style-type: none"> Coordinate this objective with Objective INFO 1. Publicize the Virginia Livable Home Tax Credit (LHTC) program, which provides tax credits for up to \$5,000 for the purchase of a new accessible residence and up to 50 percent for the cost of retrofitting existing units, not to exceed \$5,000, as of 2.1.11. Promote universal design and visitability by: (1) Informing local builders about the Certified Aging in Place Specialist program of the National Association of Home Builders. (2) Providing a brochure or web page that describes what universal design is and details the economic and safety benefits for different populations and stages of life. Train and mobilize volunteers (e.g., retirees, boomers, students) to undertake housing audits for seniors and younger people with disabilities who would like an assessment of accessibility design features, heating and cooling adequacy, features of healthy homes, and maintenance issues. Link this effort to home remodelers who agree to undertake needed upgrades for a “senior-friendly” fee for their products and services. Volunteers can also do repairs to address audit findings. Review City regulations about recycling and trash collection to ensure that they accommodate residents’ different physical abilities. Ensure that in-home care providers are trained to identify hazards and unhealthy conditions in senior homes and know what resources are available for correction of the conditions. 	
Who else benefits: Family members and other caregivers + Builders + Volunteers + Environmentalists + People with disabilities	

Objective

FY to be Completed: 2013

Aging at home

HOUS 5. Recognizing the expected growth in eligibility for the **Real Estate Tax Relief and Assistance Program for Elderly and Disabled Persons**, the City evaluates its eligibility criteria and anticipated fiscal impact and plans accordingly.

Action Steps:

- Review the issue and prepare recommendation for City Council.

Who Else Benefits: All taxpayers

Potential Partners For Housing:

- ARHA – Alexandria Redevelopment and Housing Authority
- Architects
- Financial institutions
- Builders and Contractors
- National Association of Home Builders
- Certified Aging in Place Specialists

3. Transportation

Goal #3. A variety of mobility options, including pedestrian-safe streets, make moving in and around the City and region possible for Alexandrians of all ages and abilities.

Considerations for Alexandria Today

Transportation needs. Older men average six years when they cannot drive, and older women average ten. Lack of transportation causes missed doctor appointments, the inability to work or volunteer, and the use of caregiver time to provide transportation.

Pedestrian-friendly streets. Alexandria shares the distinction of being one of three “most walkable” cities in Virginia. But seniors need specific pedestrian amenities to ensure their outdoor safety and enjoyment.

The Alexandria of Our Future: Objectives and Action Steps

Objective	FY to be Completed: 2012
<p>TRANS 1. Alexandrians support safe, walkable, mixed-used, transit-oriented development.</p>	
<p>Action Steps:</p> <ul style="list-style-type: none"> • Older adults are encouraged to support such design. • Each year, the Alexandria Commission on Aging will invite a representative from the Department of Transportation and Environmental Services for an update on progress on goals relevant to the needs of older adults. 	
<p>Who Else Benefits: All Alexandrians</p>	

Objective	FY to be Completed : 2013
<p>TRANS 2. A cost-benefit analysis of a range of transportation options for seniors is undertaken, and the best strategies are implemented. Options for consideration include:</p>	
<ul style="list-style-type: none"> • Increase the supply of specialty van transport services. • Expand availability of Senior Taxi (e.g., add evening and weekend hours, add destinations, pilot a coupon discount program). • Determine if the additional DASH buses planned for BRAC-133 rush hour can be put into service during other hours for shared availability across the human services. • Investigate the option of using transportation vouchers for older adults to ride the bus or train, take a cab, or even pay friends or a family member for a ride. • Consider the model of the Independent Transportation Network (ITN), which allows older people to trade their own cars for transportation credits and enables volunteer drivers to accumulate credits themselves or convert them into a fund for low income riders. 	
<p>Action Steps:</p> <ul style="list-style-type: none"> • Identify appropriate partners to undertake the cost-benefit analysis. • Implement the best identified solutions. 	
<p>Who Else Benefits:</p> <ul style="list-style-type: none"> • Family members and other caregivers • Retailers 	

Objective	FY to be Completed
TRANS 3. Volunteers (e.g., retirees, boomers, students) are utilized to conduct walkability and accessibility audits of Alexandria and local facilities and make recommendations for changes to enhance the experience of seniors and younger people with disabilities (e.g., increase the safety of sidewalks with pavers, improve navigability in parks).	2012
Action Steps: <ul style="list-style-type: none"> • Identify and train a volunteer group to take the lead to perform the audits. • Identify where improvements can be made and share that information with the Chamber of Commerce and appropriate City agencies. • Issue a “senior-friendly” seal to those businesses and public places scoring well in the audit. 	
Who Else Benefits: All pedestrians + Businesses + Volunteers + Younger people with disabilities	

Potential Partners for Transportation Options:

<ul style="list-style-type: none"> • DASH Bus • MetroAccess • Taxi Industry 	<ul style="list-style-type: none"> • Senior Taxi • WMATA – Washington Metropolitan Area Transit Authority
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4. Community Services

Goal #4. Community services accommodate the expectations and needs of aging Alexandrians and support their caregivers.

Considerations for Alexandria Today

Home-based services. The right services and products can increase seniors’ ability to remain safe at home throughout their later years. Objectives are to minimize risk, maintain function and independence, assist family caregivers, prevent institutionalization and provide significantly less costly, quality care.

Caregiver support. Two-thirds of seniors who age in place receive caregiver support *only* from family and friends. In about 25% of U.S. households, a person is caring for someone 50 or older.

The Alexandria of Our Future: Objectives and Action Steps

Objective	FY to be Completed : 2013
<i>In-home services</i>	
SERV 1. At least one new affordable in-home service is available for seniors and/or their caregivers.	
Action Steps: <ul style="list-style-type: none"> • Implement bathing services as part of the Companion Aide program. • Research the possible expansion of the Companion Aide program to include in-home respite care, using a sliding fee scale based on caregiver income. • Consider creation of a volunteer intergenerational Legacy Corps⁴ to provide companionship to frail seniors and respite for their caregivers. • Determine the feasibility of providing information and in-home care and support services, such as nursing case management, at locations with high concentrations of senior residents, thereby creating an alternative to assisted living. • Determine if selected home-based services could be offered on a sliding scale to all seniors, so that higher fees-for-service could subsidize lower-income seniors. 	
Who Else Benefits: Families and other caregivers + Discharge planners + Service providers + Job seekers	

Objective	FY to be Completed: 2013
<i>Caregiver resources</i>	
SERV 2. Caregivers have expanded access to information, education, and resources.	
Action Steps: <ul style="list-style-type: none"> • Offer periodic conference calls for family caregivers, with part of the call focused on information-sharing about available services and supports, and the remainder for Q&A. • Encourage the City of Alexandria Human Resources department to take the lead in modeling workplace policies to accommodate family caregivers—e.g., paid sick leave for caregiving, flex-time, job-sharing, providing employees with information about local resources that assist seniors. • Promote affordable technologies that help caregivers deliver, monitor, track and/or 	

⁴ Legacy Corp is a groundbreaking caregiver respite program based on intergenerational support. One California affiliate, for example, trains multigenerational service teams of youth and their older adult mentors to provide free respite care, light household chores, and errands for family members caring for a homebound senior while also providing seniors with companionship and various enjoyable activities. <http://www.nailegacycorps.com>, accessed 3.24.11.

coordinate their loved one's medical care.

- Create a Caregivers Blog on the Adult Day Services Center website.
- Establish caregiver information desks at libraries, staffed by older volunteers.

Who else benefits: Family members and other caregivers + Businesses

Objective

FY to be Completed: 2012

Safety and protection

SERV 3. Seniors have at least two **new types of advocates** looking out for their well-being.

Action Steps:

- Coordinate this objective with Objective INFO 1 so that more residents know how to identify need and provide help to seniors when the situation requires it.
- Work closely with Adult Protective Services staff, financial institutions, particularly banks, Social Security offices, senior advocacy groups, and the police to educate employees on how to prevent, identify, and report potential financial exploitation.
- Work closely with EMS personnel, home care providers, neighborhood associations, and others who have routine access to the homes of older residents to enable them to identify hazards, unhealthy conditions, or danger, and respond appropriately.

Who Else Benefits: Family members and other caregivers + Financial literacy providers + Insurers

Potential Partners For Community Service

Provision:

- Property management companies
- Businesses serving older adults
- Health care and other service providers
- Neighborhood associations
- Resident associations

5. Economic and Workforce Development

Goal #5. The important contributions of older Alexandrians to the City's economy are recognized, and the innovative entrepreneurship of older residents is encouraged.

Considerations for Alexandria Today

The doubling of the senior population and the welcoming of retirees to the City in the years ahead is good news for business because:

- many seniors have considerable spending power;
- the new products and services that seniors need can create new businesses and expand existing ones; and
- seniors have skills and experience enabling them to mentor young entrepreneurs and younger workers.

In addition, older workers remain a value to the workforce and are especially drawn to workplaces that provide job flexibility.

The Alexandria of Our Future: Objectives and Action Steps

Objective	FY to be Completed: 2014
<p>ECON 1. A high-level task force develops strategies for the private sector and the City to tap the potential of the aging population as employees, entrepreneurs, and consumers.</p>	
<p>Action Steps:</p> <ul style="list-style-type: none"> • Select task force membership, to include strong leadership from the business and education communities. • Utilize local data and innovative examples from other communities to identify how the City can tap the assets of seniors for economic development, including ideas such as: the creation of an “Encore Business Incubator” for older entrepreneurs and their mentoring of younger entrepreneurs to create new local businesses in areas of demand; greater access for older residents to skills such as business-essential computer literacy for re-employment or the maintenance of productivity in current work assignments; workplace flexibility features to retain valued older works (e.g., part-time work, job sharing, telecommuting); the encouragement of older consumers to “buy local.” 	
<p>Who Else Benefits: Investors + Local employers + Job seekers + Consumers + Local businesses + Local government (revenue base)</p>	

Objective	FY to be Completed: 2014
<p>ECON 2. The public high school creates modules for its curriculum, coupled with second language instruction, to attract more of the area’s young adults into health care and aging occupations, and links success in those courses to opportunities for internships and education-to-work pipelines.</p>	
<p>Action Steps:</p> <ul style="list-style-type: none"> • With school leadership, create a working coalition of educators, retired medical personnel, and workforce developers to investigate the feasibility and requirements of such a pipeline. • Begin with a pilot cohort of students to test each phase of the offering. • As applicable, link students to entrepreneurial opportunities that may emerge from Objective ECON 1. • Involve SCORE as teachers and consultants to emerging businesses. 	
<p>Who Else Benefits: Youth + Public schools + Volunteers + Local entrepreneurs and employers</p>	

Objective	FY to be Completed: 2014
<p>ECON 3. Alexandria is recognized as a prominent and desirable retirement location, especially for military and federal retirees, as measured by an increase in residents in the City receiving military or federal retirement benefits.</p>	
<p>Action Steps:</p> <ul style="list-style-type: none"> • Utilizing various modalities such as www.visitalexandriava.com, actively promote Alexandria as a desirable retirement location because of its local amenities, walkable neighborhoods, and high quality of life for seniors. • Monitor the number of military and federal retirees residing in the city to document change. 	
<p>Who Else Benefits: Local businesses and retailers + Housing industry + Local government (revenue base)</p>	

Objective	FY to be Completed:2012
<p>ECON 4. Employees of Alexandria government, businesses, non-profits and other entities in the City understand the laws prohibiting age discrimination in employment.</p>	
<p>Action Steps:</p> <ul style="list-style-type: none"> • The City's Office on Human Rights and the Commission on Human Rights, with the Office on Aging and Adult Services and the Commission on Aging, conduct joint outreach to 	

educate older adults about laws prohibiting age discrimination at the workplace and the requirements for bringing cases.

- Both offices and commissions review legislative proposals and support those that can enhance the capacity of older employees to be treated justly if they are subject to age discrimination.

Who Else Benefits: Employers who understand the benefits of employing older workers + the City as a model

Potential Partners For Economic and Workforce Development:

- Agenda Alexandria
- Council of Governments, COG
- Economic Development Authority
- Northern Virginia Regional Commission, NVRC
- Retirement Associations – AARP, MOAA, NARFE, NCOAA
- Chamber of Commerce Small Business Development Office
- Older Dominion Partnership
- Public school system
- Community colleges

6. Quality of Life

Goal #6. The quality of life of all Alexandrians is enhanced by the many volunteer activities of its older residents and their continued involvement in the social and civic life of the City.

Considerations for Alexandria Today

Social, recreational, and educational activities. At any age, physical and mental health are advanced when people have the opportunity to participate in activities that enable them to socialize, give them exercise, and stimulate their minds. When these activities are intergenerational, the benefits are multiplied for everyone involved.

Volunteering and civic participation. The primary reason seniors volunteer or otherwise become civically engaged is because they are asked to. Alexandria’s seniors represent a growing natural resource whose time and talents can be tapped for the well-being of the City.

The Alexandria of Our Future: Objectives and Action Steps

Objective	FY to be Completed:2013
<i>Civic engagement</i>	
QUAL 1. City Council designates one seat on all relevant Boards and Commissions for a resident 60+ with an identified older constituency.	
Action Steps:	
<ul style="list-style-type: none"> • Identify the Boards and Commissions which would benefit from a representative 60+. • Meeting by member of Commission on Aging with Chairs of identified Boards and Commissions to discuss benefits of representation for older residents. • Submit requests to Council to approve changes in membership requirements. • Consider simultaneously recommending the inclusion of youth with an identified constituency on relevant Boards and Commissions, as a gesture of intergenerational cooperation. 	
Who else benefits: Elected officials + Boards, Commissions	

Objective	FY to be Completed:2012
<i>Volunteer opportunities</i>	
QUAL 2. Volunteer opportunities for older adults are readily accessed and the business case for older volunteers is widely known.	
Action Steps:	
<ul style="list-style-type: none"> • Work with Volunteer Alexandria to create a category link for older volunteers. • Increase the listings for volunteer opportunities within the City on the City web page. • Determine the feasibility of posting the City’s most important issues that can benefit from volunteerism (e.g., student success, language and literacy skills) on http://alexandria.gov/Volunteer in order to produce a critical mass of volunteers of all ages – including older residents – to be able to show measurable improvement around the City’s key challenges. • Develop and distribute printed material to the City, the business community, the nonprofit sector, and neighborhood associations promoting the business case and offering guidance for the use of older volunteers. 	
Who Else Benefits: The whole community + Nonprofit organizations	

Objective

FY to be Completed: 2014

Meeting changing expectations of boomer generation

QUAL 3. Boomers’ desires are included in designing programs/events/spaces to meet their needs.

Action Steps:

- Identify best practices and successful strategies across the nation that meet the desires of boomers and other seniors for recreation, social activities, lifelong learning, and intergenerational programming.
- Determine the feasibility of utilizing existing non-traditional space, such as commercial and retail space and school facilities, for programs and events.
- Research other senior center models such as Café Plus.
- Create lifelong learning classes in a wide variety of subjects for older residents that are taught by older residents. Offer these courses to persons of all ages.

Who Else Benefits: City, through greater use of existing spaces

Potential Partners To Ensure Quality Of Life:

- ACTION Alexandria
- Alexandria/Arlington Cooperative Extension Service
- Neighborhood Associations
- NOVA Adult Education
- School District
- Volunteer Alexandria
- City

7. Health, Wellness, and Safety

Goal #7. All residents, with special attention to lower-income, older City residents, optimize their wellness and receive the health care they require.

Considerations for Alexandria

Health care. A focus on prevention, wellness, and health, as well as giving priority to community-

based care and management of chronic illness, will reduce stresses on the Medicaid/Medicare system, which cannot support institutional care for the increasing number of seniors over the next 20 years.

Good nutrition. Access to healthy foods improves both the quality of life and longevity of older people and prevents obesity and other chronic conditions for all generations.

Safety and protection. A 2009 study estimated that 14% of older adults experienced abuse, neglect, or financial exploitation. In the face of a local disaster, particular consideration needs to be given to the older population.

The Alexandria of Our Future: Objectives and Action Steps

Objective	FY to be Completed: 2014
<i>PACE</i>	
HEAL 1. PACE, the Program for All Inclusive Care for the Elderly, expands into Alexandria.	
Action Steps: <ul style="list-style-type: none"> • Collaborate with INOVA Hospital system to integrate Alexandria residents into their PACE program. • Educate Alexandrians about benefits of PACE program. 	
Who Else Benefits: Family members + Caregivers + Businesses serving seniors	

Objective	FY to be Completed: 2012
<i>Community Based Services</i>	
HEAL 2. Funding from the Affordable Care Act is secured for community and home based services.	
Action Steps: <ul style="list-style-type: none"> • Needs of Alexandrians for home and community based care are identified. • A lead organization takes responsibility for developing a proposal and managing the federal process for grants. 	
Who Else Benefits: Family members and other caregivers + Businesses serving seniors and their families	

Objective	FY to be Completed: 2013
<i>Mental Health</i>	
HEAL 3. Appropriate urgent/emergency services are available within 25 miles of Alexandria to seriously mentally ill older adults, including acute hospitalization and crisis care alternatives.	
Action Steps:	
<ul style="list-style-type: none"> • Collaborate with other local jurisdictions to develop cross-jurisdictional solutions. • Work with NVAN if legislative change is needed. 	
Who Else Benefits: Family members and other caregivers	

Objective	FY to be Completed: 2015
<i>Good Nutrition</i>	
HEAL 4. Older adults and other residents have access to healthy, fresh foods and understand the role of nutritious foods in preserving health.	
Action Steps:	
<ul style="list-style-type: none"> • The Alexandria/Arlington Cooperative Extension Service works with the Department of Recreation and Culture and the Division on Aging and Adult Services to identify locations for additional community gardens serving lower-income, older adults. • Older adults, who are able, work in the community gardens. • Alexandria’s farmers’ markets accept food stamps. • Nutrition information and guidelines relevant to older adults are widely available and classes are provided by the Alexandria/Arlington Cooperative Extension Service. • An assessment is undertaken to determine the feasibility of greater use of local fresh foods in senior meals programs. 	
Who Else Benefits: All Alexandrians + Environmentalists	

Objective	FY to be Completed: 2012
<i>Emergency Preparedness</i>	
HEAL 5. Special needs populations within the City of Alexandria, particularly the subset of Alexandria residents with special medical needs, are defined and identified so that appropriate support is available to them in the event of an emergency.	

Action Steps:

- Assist the Alexandria Health Department to identify known clients who have special medical needs.
- Advise clients with special medical needs to develop a personal preparedness plan to promote self-sufficiency for at least 72 hours following an incident.
- Serve on the task force, working with the Alexandria Health Department, to increase coordination among partner agencies to meet the needs of residents who may require special medical care/support during an incident.
- Assist the Health Department to identify resources to help City departments and other agencies meet the needs of all Alexandria residents during an incident.

Who Else Benefits: Persons with disabilities + caregivers + emergency response personnel

**Potential Partners to Advance
Health And Wellness:**

- Alexandria/Arlington Coopoerative Extension Service
- Alzheimer’s Association
- Alexandria Emergency Medical Service
- Caregivers’ associations
- Red Cross
- Partnership for Healthy Alexandria
- Alexandria Health Department

Managing the Work

The objectives have been arrayed over a five-year implementation sequence (see below) so that residents see **progress each year** on many issues while appropriate time is given for the most complex objectives to be implemented. For the objectives in the out-years, work will nevertheless need to be initiated in 2012 or 2013.

YEAR OF COMPLETION	<u>2012</u>	<u>2013</u>	<u>2014</u>	<u>2015</u>	<u>2016</u>
OBJECTIVES	INFO 1	HOUS 3	ECON 1	ECON 2	ECON 3
	HOUS 4	HOUS 5	QUAL 3		HOUS 1
	TRANS 1	SERV 1	HEAL 1		HOUS2
	TRANS 3	SERV 2	HEAL 4		
	SERV 3	QUAL 1			
	QUAL 2	HEAL 3			
	HEAL 2	TRANS 2			
	HEAL 5				
	ECON 4				

This Strategic Plan has built interest and momentum around the aging of Alexandria. New allies and newly-identified stakeholders have been brought to the table throughout the Plan’s development. In order for DAAS to maintain these relationships and to realize the aspirations Alexandria has for its older residents, the following **infrastructure** is needed:

1. **Sufficient staff support within DAAS** to implement the Strategic Plan and assure its meaningful coordination with other strategic plans of the City.
2. **Determination of the feasibility of creating a nonprofit, 501(c)(3) corporation** that will have the flexibility to avail itself of the many entrepreneurial possibilities spawned by a growing senior marketplace and would have a triple bottom line – meeting DAAS’ mission, serving a wider spectrum of older Alexandrians, and producing positive financial returns.
3. **Intentionality to the increasing diversity of the older population.** The availability of informational materials in key local languages and services that are culturally sensitive are

key components of intentionality in reaching and responding to diverse older residents and their families.

4. **Extension of the DAAS Strategic Plan Advisory Group.** This group represents linkage to sectors of the City outside of the aging network, with whom relationships will need to deepen to fully realize the Goals and Objectives of this Strategic Plan.
5. **A trained cadre of spokespeople** who are knowledgeable about aging issues and can constitute a Speakers Bureau to inform and mobilize residents around the implementation of this Plan. The Commission on Aging can serve as the core group for this function.
6. **Annual progress reports from City departments and other stakeholders** who have taken the lead in the implementation of various aspects of the Plan to the Commission on Aging and DAAS. Such planned annual convenings foster both the knowledge sharing and accountability that are crucial to collaborative movement toward a livable community for all ages.
7. **Collaboration** where the aspirations of this Plan intersect with other City strategic plans. The Full Plan summarizes the ways that Objectives in this Plan align with those in other City strategic plans. Collaboration around the implementation of shared aspirations will produce efficiencies for all stakeholders and demonstrate the interdependence of Alexandrians in the creation of a livable community for all ages.

A Call for Champions of All Ages

Aging is a lifelong process. What a community does for *every* generation today predicts not only how today's seniors fare, but also the prospects for tomorrow's seniors. At any age every resident has assets to share and concerns to be addressed. This Plan highlights the significant assets that Alexandria's older residents bring to shape a vibrant City. It also positions Alexandria as a caring community for those in later life who have the need for assistance and support.

The expected doubling of Alexandria's older population is dramatic in itself. Even more dramatic is the opportunity for the City to respond by committing to strategies that strengthen bonds across generations, recognize the interconnectedness of issues, and build bridges across departmental domains and constituencies. This Plan offers those strategies. And it foresees a host of champions and allies for the work ahead.

DRAFT

Housing Trust Fund Programs Financial Status

For the Period July 1, 2010 - June 30, 2011

Balance as of June 30, 2011	3,448,962
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Revenues for FY 2011	
Contributions	598,722
Interest - Potomac Yard Development	0
Interest	24,979
Loan Repayments	
Community Lodgings Inc. (CLI)	29,748
Employee Homeownership Incentive Program (EHIP)	5,689
Moderate Income Homeownership Program (MIHP)	128,599
Fees Offsetting Expenditures	435
	788,173

Expenditures for FY 2011	
Employee Homeownership Incentive Program (EHIP)	70,135
Homeownership Counseling	65,320
Housing Opportunities Fund - <i>see attached report</i>	197,582
HOME/HOF Match	0
Moderate Income Homeownership Program (MIHP)	134,096
Rental Accessibility Modification Program (RAMP)	0
Rebuilding Together Alexandria (RTA)	35,000
	(502,134)

Balance Available Before Outstanding Commitments/Reservations	3,735,001
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Outstanding Commitments/Reservations as of June 30, 2011	
ARHA Set-Aside (James Bland 16 replacement units)- by formula	1,755,592
ARHA Set-Aside (James Bland 16 replacement units) - other HTF revenue	293,245
Employee Homeownership Incentive Program (EHIP)	77,630
HOME/HOF Match	153,098
Reserved for FY 2012 HOME/HOF Match	27,460
Homeownership Counseling	32,420
Housing Opportunities Fund - <i>see attached report</i>	402,303
Moderate Income Homeownership Program (MIHP)	364,385
Rental Accessibility Modification Program (RAMP)	7,190
	(3,113,322)

Unreserved Balance as of June 30, 2011	621,678
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Housing Opportunities Fund Financial Status
For the period July 1, 2010 - June 30, 2011

	HTF	General Fund	HOME	TOTAL
Balance as of June 30, 2011	599,830	160,610	1,208,488	1,968,928
FY 2011 Allocation	0	200,000	400,000	600,000
FY 2011 Expenditures				
Alexandria Housing and Development Corporation (AHDC)		200,000		200,000
Beasley Square Construction (Harambee)	197,528			197,528
Balance Available Before Outstanding Commitments	402,303	160,610	1,608,488	2,171,401
Outstanding Commitments				
Alexandria Housing Development Corporation (AHDC)		0		0
ARHA Set-Aside (James Bland 16 replacement units)		10,610		10,610
Brent Place Elevator Modernization			494,447	494,447
Unreserved Balance as of June 30, 2011	402,303	150,000	1,114,041	1,666,344

HOMEOWNERSHIP PROGRAMS REPORT FY 2011

<i>Total FY 2011 as of June 30, 2011</i>				
	Loans Committed	Amount and Source of Committed Loan Funds	Loans Settled	Amount and Source of Settled Loan Funds
HAP	25	\$382,671.68-CDBG \$523,200.40-HOME \$60,000 - HAP Contingent	24	\$382,671.68-CDBG \$523,200.40-HOME \$60,000- HAP Contingent
MIHP	5	\$133,380.99-HTF	6	\$133,380.99-HTF \$30,000- HOF/GF
EHP	7	\$70,000-HTF	5	\$50,000-HTF

Loan Balances as of June 30, 2011:

HAP	\$	465,933	<i>Grants</i>
	\$	-	<i>General Fund - Contingent Reserves</i>
MIHP	\$	364,385	<i>Housing Trust Fund</i>
	X		<i>Housing Opportunities Fund/General Fund</i>
EHP	\$	77,630	



City of Alexandria, Virginia
301 King Street, Suite 2300
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Mayor

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william.euille@alexandriava.gov

June 30, 2011

Mr. Michael J. O'Rourke, Co-Chair
Homeless Services Coordinating Committee
c/o Arlington-Alexandria Coalition for the Homeless
3103 9th Road, N
Arlington, Virginia 22201

Dear Mr. O'Rourke and Members of the Homeless Services Coordinating Committee:

Thank you for your letter regarding the results of the recent report, A Regional Portrait of Homelessness, and your willingness to engage in solutions surrounding this issue. We are eager to participate in a work session in October or November to discuss strategies included in the community's revised plan to prevent and end homelessness. We fully support your efforts to assist those Alexandrians struggling to maintain housing.

On our return from the summer recess, a Council work session will be scheduled to discuss the community's strategic plan and develop ways for City Council to more directly collaborate with the Homeless Services Coordinating Committee, to positively influence issues surrounding homelessness within the City. It is City Council's intent to address critical affordable housing needs, as indicated by the Alexandria residents through the City strategic planning process.

We look forward to hearing more about the HSCC's hard work and developing a closer partnership to effectively impact and end homelessness in the City.

Sincerely,


William D. Euille
Mayor

cc The Honorable Members of City Council
Bruce Johnson, Acting City Manager
Michele Evans, Deputy City Manager

"Home Town of George Washington and Robert E. Lee"

May 27, 2011

The Honorable William D. Euille, Mayor
The Honorable Kerry Donley, Vice Mayor
The Honorable Frank H. Fannon IV, Council Member
The Honorable Alicia Hughes, Council Member
The Honorable Rob Krupicka, Council Member
The Honorable Redella S. "Del" Pepper, Council Member
The Honorable Paul C. Smedberg, Council Member

301 King St., Room 2300
Alexandria, VA 2231

Dear Honorable Mayor and Members of City Council:

Three out of every 1,000 Alexandrians are homeless. Unfortunately, the Council of Governments' (CoG) report, A Regional Portrait of Homelessness, shows Alexandria as **second** only to Washington, D.C. in per capita homelessness and **first** in Northern Virginia. Additionally, Alexandria is one of two communities that experienced a significant increase, 16 percent, in their homeless population from the prior year.

We are writing this letter for your support to end homelessness in the City of Alexandria. On a specific day in January each year, the CoG with its regional partners, conducts a Point in Time (PIT) count of the number of homeless persons living in metropolitan Virginia, Maryland and Washington, D.C. On January 26, 2011, (a day of the significant snowfall in Alexandria) the Alexandria Department of Community and Human Services staff, along with the Homeless Services Coordinating Committee members, did its PIT count of those experiencing homelessness in emergency and transitional shelters, as well as in places unfit for human habitation (streets, woods, bridges) to determine the unduplicated number of persons experiencing homelessness in the City of Alexandria. On that day, 416 persons were counted as being homeless in Alexandria. Of the total, 264 were single adults, of which 42 were unsheltered. There were 52 families, comprised of 152 persons, including 94 children. There were no unsheltered families.

The information is collected and reviewed by Alexandria's Continuum of Care, the Homeless Services Coordinating Committee (HSCC), a collaboration of a cross section of the community, consisting of 31 member agencies (public, private non-profit, faith-based, educational, and advocacy organizations), as well as individual citizens and "formerly homeless" consumers. Cooperatively, they have invested efforts to address the immediate and long-term needs of persons at-risk of becoming homeless and/or experiencing homelessness, with a goal of promoting permanent housing. The PIT count data is used to identify needs and services of individuals and families experiencing homelessness and gaps in programs.

The Homeless Services Coordinating Committee recommends, to the Mayor and City Council, the following initial strategies to address this critical issue as part of the Council's own strategic plan, goal #7:

1. Make affordable housing that is accessible to very low-income households a top priority in the City. In the past ten years, Alexandria has lost over 10,000 privately-owned affordable housing units. We encourage responsible development that tangibly supports the needs of Alexandria's less fortunate citizens;
2. Create 96 affordable efficiency units which will provide immediate relief to the issue of homelessness by accommodating chronically homeless individuals; and
3. Limit or eliminate barriers, such as zoning restrictions, to allow for the creation or development of affordable housing options for homeless individuals and families, and those at risk of becoming homeless, living at or below the poverty guidelines.

The HSCC stands ready to assist in this effort by leveraging our base of community support, educating the public through our programs and media, and supporting your political will toward the elimination of homelessness in the City of Alexandria. Additionally, the HSCC is completing the revision of its strategic plan to prevent and end homelessness in Alexandria. We will be contacting you to arrange a meeting, at your earliest convenience, to discuss key elements of the plan.

We need the support and guidance of our elected leaders to end homelessness in the City of Alexandria. We invite you to our monthly meeting to be part of our efforts toward this goal. The meetings are held the third Tuesday of each month, 10:00 a.m. at the Charles Houston Recreation Center. The next meeting will be held Tuesday, June 21, 2011. Feel free to contact me for additional information at (703) 525 – 7177.

Sincerely,

Michael J. O'Rourke
Co-Chair, Alexandria Homeless Services Coordinating Committee

With the concurrence and support of:

Alexandria Neighborhood Health Services, Inc.	K.I. Services, Inc.
Alexandria Health Department	INOVA Alexandria Hospital
Alexandria Redevelopment and Housing Authority	New Hope Housing, Inc.
Arlington-Alexandria Coalition for the Homeless	Northern Virginia Family Services
Carpenter's Shelter	Offender Aid and Restoration

Christ Church – Lazarus Ministry

Community Lodgings

Friends of Guest House

Alexandria Police Department

Alexandria Department of Community and Human Services

Virginia Department of Corrections, Alexandria Probation and Parole

Salvation Army

United Way

Washington Street United Methodist Church

The Open Table

City of Alexandria, Virginia

MEMORANDUM

DATE: JUNE 20, 2011

TO: THE HONORABLE MAYOR AND MEMBERS OF CITY COUNCIL

FROM:  BRUCE JOHNSON, ACTING CITY MANAGER

SUBJECT: CONSIDERATION OF REPORT AND RECOMMENDATIONS
CONCERNING ARLANDRIA CHRILAGUA HOUSING CORPORATION

ISSUE: Status update with regard to the ongoing staff review of the Arlandria Chirilagua Housing Corporation (ACHC)

RECOMMENDATION: That City Council:

1. Approve a modification of the current forgivable \$232,000 loan to become a 99-year loan (from the date of execution), with a default provision for ceasing to operate successfully as a cooperative in the future, contingent on the adoption of changes to the By-Laws, Articles of Incorporation, and any other needed documents, to the satisfaction of the Acting City Manager, and
2. Authorize the Acting City Manager to execute all necessary documents.

BACKGROUND: For some time, staff has been engaged in a review of the 284-unit Arlandria Chirilagua Housing Corporation (ACHC) to determine whether it is successfully operating as a cooperative, for the purpose of addressing a 1994 City loan provision called for forgiveness of \$232,000 in City loans, out of \$537,000 in City loans, in the event of successful operation, or repayment if the organization is not successfully operating. Additional background information is contained in Attachment 1, the most recent docket item from April 2010 on this matter.

DISCUSSION: When this matter was last before City Council, one of Council's primary concerns was the physical condition of the property, the adequacy of its reserves, and ACHC governance issues. This memorandum summarizes what has occurred in this regard since that time, and also provides a brief update with regard to other issues regarding the determination of the Cooperative's successful operation.

Physical Condition and Repair/Replacement Reserves. The ACHC Board reports that, since it took office and replaced the prior ACHC Board in December 2009, all buildings have been inspected and an annual inspections schedule has been established; 3,000 work orders have been completed by maintenance staff; and emergency maintenance calls have decreased from 10 – 15

per day to approximately three per week. As a further reflection of the new Board's attention to maintenance matters, while Code Administration recorded 33 complaints from the property in calendar year 2009, this number declined to 19 in 2010, and then to zero in 2011 as of June 17.

Attachment 2 summarizes ACHC's repair activity and provides photographs of renovated units. Since June 2010, approximately 43 refrigerators, 30 kitchen ranges, and 64 HVAC units have been replaced. Repair activity during 2011 has included roof repairs at several buildings, the installation of smoke detectors at all buildings, window replacement (currently 50% complete) at 3200 Commonwealth Avenue, installation of smoke detectors on the top floors of all buildings, installation of security cameras at 3200 Commonwealth Avenue, repairs of common area lights, and repair/replacement/installation of railings at several buildings, and termite treatment at the Bruce Street and Four Mile Road buildings.

In addition to repairs, 20 units have been completely rehabilitated (see Attachment 2), to include new cabinets, countertops, kitchen and bath tile, new appliances, carpet, and paint, along with installation of new insulation in the exterior walls. ACHC representatives reported to staff that they can continue to rehabilitate units in this manner at a rate of one to two units every other month, but they are currently exploring options to borrow from a private sector bank that would allow them to accelerate this schedule.

As part of the City's examination of ACHC, an onsite review of the property's physical condition and financial records was conducted in October 2010 by Associa Community Management Corporation at the request of the law firm of Mercer Trigiani who has provided pro bono expert advice to the City.¹ The Associa review concluded that ACHC "has been proactive in improving the condition of the Arlandria Chirilagua property" and "based on the new standards and scope of work performed on the renovations of the residential units...has high expectations of what they wish their community to become in the future." It also made several recommendations to be added to ACHC's work plan, in response to which ACHC has done the following:

- ensured that all buildings have adequate smoke detectors in each stairway to include a detector at the top floor level
- begun the process (to be completed by July 1) of sealing all missing dryer vent penetration holes on the exterior of the buildings
- locked all three tot lots pending refurbishment (to be addressed after common hallway refurbishment has been completed and the budget allows)
- addressed critical needs with regard to securing loose and replacing missing stair treads in the building hallways, to be addressed permanently with the refurbishment of the common hallways and landings per the immediate repair needs identified in the Physical Needs Assessment
- removed critical areas of loose and peeling paint, to be addressed permanently with the refurbishment of the common hallways and landings per the immediate repair needs of the Physical Needs Assessment.

¹ A previous pro bono review by a consulting firm in March 2010 did not result in a written report, necessitating that a new review be conducted.

Also pursuant to the October 2010 review, ACHC updated its reserve study by obtaining a “Fannie Mae Multifamily Physical Needs Assessment” by Connor Engineering in March 2011. The Connor Engineering assessment addresses the property’s immediate repair needs and projected repair/replacement costs over the next 12 years, based on an inspection of the common areas, review of major systems, and inspections of 30 units. The report identified immediate repair needs at an estimated cost of \$207,600, including basement waterproofing, fence replacement, refurbishing of common hallways and landings, handrail replacement, broken glass replacement, and remediation of mold growth.

The assessment projected the cost of additional repair and replacement needs (above and beyond immediate repair needs) over the next 12 years at an additional \$1.123 million, or roughly \$94,000 a year. This includes costs for paving, roofing, masonry, common area refinishing, individual dwelling unit upgrades, water heater replacement and HVAC replacement. Attachment 3 provides a summary of needs and costs.

Based on property financial reports provided to staff, as of April 2011 ACHC had \$402,434 in reserves and has deposited more than \$9,000 per month so far this year. At this rate, its reserve deposits for the year will be in excess of \$108,000. These amounts are sufficient to cover both the immediate needs and the anticipated 12-year repair and replacement needs.

ACHC’s lender, Wells Fargo, conducted an additional inspection of the property in February 2011. Attachment 4 is an excerpt from a letter to Wells Fargo from AAMCI outlining ACHC’s actions to date and future plans to address the items identified in that inspection.

Other Aspects of the City’s Review. The City’s review also focused on a number of non-financial issues, most notably issues related to the governance of the cooperative. The ACHC Board is in agreement with the vast majority of staff’s recommendations, and has had its By-Laws and Articles of Incorporation rewritten (in both English and Spanish) to address them. However, staff will need to review the documents and to work with the ACHC Board to resolve a few remaining areas of concern. Adoption of the revised documents will require a vote by the membership. However, the Board considers it critical to gain the trust of the membership before recommending significant changes, and is currently working to do so.

Although new documents have not yet been formally approved, the Board has instituted practices consistent with the intent of some of the recommended changes. In other words, some of the City’s concerns have been satisfied although they have not yet been formalized. For example, although the membership has not adopted a recommended amendment to the By-Laws to impose specific notice requirements on the Board, the Board now meets on a regular monthly schedule, distributes notices of meetings door-to-door and posts them in common areas. Similarly, while there has been no formal adoption of an amendment of the By-Laws to include provisions requiring access to the books and records of the Association, the Board now makes its meeting minutes and financial reports, in English and Spanish, available in the office for review by members.

Another issue of concern had been the termination of memberships without a clear policy as to the circumstances in which such action was warranted. The current Board now terminates memberships only for non-payment of rent, and has prepared By-Laws change to that effect, but has not yet presented it to the membership for adoption.

Status of \$232,000 loan. When this matter was last considered by Council, Council requested alternatives to forgiving the loan, assuming a successful outcome of the review that would not necessitate repayment. Staff recommends that this loan be converted to a 99-year loan (from the date of initial execution), which would give it the same status as the remaining City loan amounts on the property, and to add a provision that would make failure to operate successfully as a cooperative an element of default under the amended loan, subject to the adoption of documents that address the recommendations previously made by staff (see the attachment to Attachment 1), to the satisfaction of the Acting City Manager. Staff anticipates being able to review the amended documents and resolve outstanding issues with the Board during the summer. Although staff understands and respects the Board's desire to build a positive relationship with the membership prior to presenting them with significant changes, and cannot predict when the Board will decide the time is right, staff is hopeful that the Board will consider presenting the revised documents to the membership in the fall.

Energy Efficiency and Conservation Block Grant (EECBG) Allocation. Based on the progress made by the ACHC Board in addressing the property's physical condition, amending previously problematic practices, and proceeding with the preparation of documents addressing the City's concerns, staff recommends that Council approve the use of \$100,000 EECBG monies by Rebuilding Together Alexandria at ACHC, pursuant to the recommendation in the following companion docket item.

Attachment 5 is an email from Russell Fleming, President of AAMCI, summarizing the value of the energy improvements to the property and its residents.

ATTACHMENTS:

1. Docket Item # 19 from May 11, 2010, Council meeting
2. Arlandria Chirilagua Housing Cooperative 2011 (repair and renovation report)
3. Immediate Repair Schedule and Twelve Year Replacement Reserve Schedule
4. Summary of actions in response to February 2011 Wells Fargo inspection
5. Email from Russell Fleming, President, AAMCI

STAFF:

Mark Jinks, Deputy City Manager
Mildrilyn Stephens Davis, Director, Office of Housing

EXHIBIT NO 119
5-11-10

City of Alexandria, Virginia

MEMORANDUM

DATE: APRIL 28, 2010

TO: THE HONORABLE MAYOR AND MEMBERS OF CITY COUNCIL

FROM: JAMES K. HARTMANN, CITY MANAGER *J*

SUBJECT: CONSIDERATION OF ENTERING INTO A FORBEARANCE AGREEMENT AND OTHER AGREEMENTS WITH THE ARLANDRIA CHIRILAGUA HOUSING CORPORATION (ACHC) LEADING TO THE FORGIVENESS OF A \$232,000 LOAN AFTER A PERIOD OF SUCCESSFUL OPERATION

ISSUE: Recommendations regarding partial forgiveness of the City's loans to ACHC.

RECOMMENDATION: That the City Council:

- (1) Authorize a forbearance agreement between the City and the Arlandria Chirilagua Housing Corporation (ACHC) to allow ACHC six months to implement actions necessary to achieve successful operation, followed by another 12 months of sustained operation in this manner;
- (2) Authorize modifications to ACHC's two remaining loans, which total \$305,000, to be amended to provide that failure to continue successful operation as a cooperative will become an element of default under those loans upon forgiveness of the \$232,000 loan, should such forgiveness occur;
- (3) Agree that, in the event staff determines, and Council concurs, that the standards for successful operation have been met and sustained for the required period of time under the forbearance agreement, as contemplated at the time the loan was made that Council will forgive the City loan in the amount of \$232,000; and
- (4) Thank the law firm of MercerTrigiani for providing (*pro bono*) legal assistance in helping address issues in this matter for the mutual benefit of ACHC's residents and the City.

BACKGROUND: The Arlandria Chirilagua Housing Cooperative, owned by the Arlandria Chirilagua Housing Corporation (ACHC) has benefited from \$537,000 in City loans for acquisition and rehabilitation made from 1994 through 1996.

Under the terms of the loan documents for the first \$232,000, this portion of the loan is to be forgiven in 15 years (July 15, 2009) if the City determines in its sole discretion that the cooperative is operating successfully, but otherwise must be repaid. During FY 2010, staff from

the Office of Housing, Code Administration and the City Attorney's Office, with assistance provided *pro bono* by MercerTrigiani, a local law firm with considerable expertise in the field of community association law, has undertaken an extensive review of various criteria to determine whether ACHC is successfully operating as a limited equity cooperative.

DISCUSSION: Since this item was last before Council in December 2009, the newly elected ACHC Board of Directors and its counsel reviewed the recommendations that had been made to the previous Board following the City's review of ACHC's operations, and met with staff to discuss its proposed actions to comply with those recommendations. Subsequently, ACHC's counsel provided staff with copies of draft documents to implement the proposed actions.

The initial recommendations, ACHC's proposed actions, and MercerTrigiani's assessment of the proposed actions are discussed in Attachment I. In essence, ACHC has proposed to do the following, and where applicable, has prepared the necessary documents to be presented to the membership for approval:

- (1) Revise its bylaws (subject to membership approval) to do the following:
 - (a) Provide a clear delineation of the maintenance and repair responsibilities between members and ACHC,
 - (b) Expressly define boundaries between dwelling units and common areas,
 - (c) Impose specific notice requirements on the Board,
 - (d) Provide a method for allocating common expenses,
 - (e) Include provisions related to access to the books and records of the association, and
 - (f) Include a requirement for the provision of a resale certificate to all potential purchasers
- (2) Provide a collections policy through which the Board may terminate membership in the cooperative
- (3) Allow a common interest community management company engaged by MercerTrigiani to review and evaluate the financial records of ACHC and ACHC facilities¹
- (4) Participate in board training regarding governance and financial management best practices

It should also be noted that ACHC is in the process of documenting conditions in every unit and developing a plan for addressing problems. This information will be shared with staff when it is completed. However, recommended physical improvements beyond what can be accommodated within the property's budget will also require membership approval of any additional charges, an outcome that the ACHC Board cannot guarantee.

As noted in Attachment I, MercerTrigiani is reasonably satisfied that the actions proposed by ACHC, if and when implemented, will bring the organization to a status of successful operation as a limited equity cooperative. Implementation of the changes to the By-Laws will require adoption of the changes by a majority of the membership, a process that ACHC estimates will take several months given the need to first translate the documents into Spanish (a process that

¹ Although a site review was conducted on March 17 at the request of MercerTrigiani by CMS Services, Inc., staff has seen only a brief e-mail summary but has not received the promised, detailed report as of this writing.

has already begun), and then hold a number of informational meetings to educate the membership about the proposed changes and their implications for residents.

With specific reference to the property's physical condition, the previous Board provided staff with a copy of a 2008 Physical Needs Assessment conducted to satisfy a requirement of Fannie Mae, along with its specific list of work items that required attention in the immediate and/or short term because of life/safety issues or environmental mitigation. The firm engaged by Fannie Mae toured all of the property's common areas, as well as 100% of the units, and developed a list of short term and long term work items. ACHC has taken care of a considerable number of the work items, drawing down on loan funds escrowed for this purpose. It is yet unclear if the property's reserves are sufficient to address all of the work items listed in the Physical Needs Analysis throughout the 12 year follow up period identified in the Assessment. It is staff's understanding that this has been reviewed by CMS Services, Inc, and staff is awaiting the detailed report. As noted above, the new ACHC Board has begun its own comprehensive assessment of conditions.

Code Administration has a statutory requirement to ensure compliance of Virginia's building and fire codes, and ACHC's counsel has indicated that Code Administration is welcome at the property at any time; however, all parties agree that only the units that are rented (approximately 8% of the total) are subject to the Residential Rental Inspection Program, and neither the City nor the ACHC Board has the authority to compel cooperative members (owners) to open their units to inspection.

Code Administration cannot assume an advisory role, but has recommended that an inspection program start with an educational effort. They have prepared programs to be presented to staff, occupants, and the Board that contain information regarding the requirements of the Virginia Maintenance Code and various City ordinances regarding property upkeep. Staff proposes to work with the ACHC Board to explain the nature of the inspection process to the members and to encourage members to participate in the inspection process on a voluntary basis. Given that the current ACHC Board has now assumed responsibility for maintenance and repair of a number of items which the previous board had assigned to members, staff is hopeful that owners will come to see inspections as a benefit designed to result in improved living conditions. Inspections by Code staff of all rental units (and any additional units whose members agree to participate) can be accomplished if the board provides proper notice to the residents. However, if the desire is to conduct more inspections than the ten percent of total units authorized under the Residential Rental Inspection Program, the process may need to be scheduled over several months. Given the reduced staffing levels in Code Administration and the need to accommodate other inspection demands, this will need to be incorporated in to the Code Administration work plan.

Although the foregoing reflects what staff considers to be a reasonable path toward achieving successful operation, the fact remains that most of the proposed actions have yet to be accomplished. Therefore, staff recommends that the City enter into a forbearance agreement that will allow ACHC six months to accomplish the desired objectives, and then requires that successful operation be maintained for an additional 12 months. In order to ensure that the City will continue to have some ability to influence ACHC's successful to the operations, staff further recommends that ACHC's remaining loans in the amount of \$305,000 be amended to provide

that failure to continue successful operation as a cooperative will become an element of default under those loans upon forgiveness of the \$232,000 loan, should such forgiveness occur.

Because of the considerable amount of time and effort that will be invested in this process, it is important that ACHC have some assurance that its planned actions, if successful, will result in the desired loan forgiveness. Therefore, staff recommends that Council agree that, in the event staff determines, and Council concurs, that the standards for successful operation have been met and sustained for the required period of time under the forbearance agreement, it will forgive the City loan in the amount of \$232,000.

STAFF:

Mildrilyn Davis, Director, Office of Housing
Christina Zechman Brown, Assistant City Attorney
Helen McIlvaine, Deputy Director, Office of Housing
Jannine Pennell, Deputy Director, Office of Building and Fire Code Administration
Melodie Seau, Division Chief, Landlord Tenant Relations

ATTACHMENTS:

Attachment I. Letter from MercerTrigiani, April 26, 2010
Attachment II. December 9, 2009 Docket Item

ATTACHMENTS OMITTED

MERCERTRIGIANI

Jeremy R. Moss
Jeremy.Moss@mercertrigiani.com

Direct Dial: 703-837-5003
Direct Fax: 703-837-5013

April 30, 2010

VIA ELECTRONIC MAIL

Mildrilyn S. Davis, Director
City of Alexandria, Office of Housing
421 King Street, Suite 200
Alexandria, Virginia 22314

MAY 3 2010

Re: City of Alexandria, Office of Housing --
Arlandria/Chirilagua Housing Corporation

Dear Ms. Davis:

On behalf of the City of Alexandria ("City") Office of Housing, we were asked to make recommendations to the City related to the operation of Arlandria/Chirilagua Housing Corporation ("ACHC"). Our firm was engaged on a *pro bono* basis to assist the City in its determination of whether ACHC is "operating successfully." In our letter to you dated November 24, 2009, we provided several recommendations to be considered prior to a determination whether ACHC is operating successfully.

Our recommendations were based on documentation provided by ACHC and their legal counsel in response to the City's request for documents on July 21, 2009 and October 5, 2009. Our review of the documentation focused primarily on the standards set out in the City's July 17, 2009 letter to the Board of Directors of ACHC ("Board"). As set forth in the City's July 17, 2009 letter to the Board and the ACHC President, we established the following criteria to determine whether ACHC is operating successfully:

1. The governance and management of ACHC shall be in compliance with the provision of Article 3 (Management of Cooperatives) of the Virginia Real Estate Cooperative Act ("Act").
2. The documentation provided to a purchaser before execution of any contract for sale of a cooperative interest shall comply with Section 55-484 of the Act.
3. The governance and management of ACHC shall be in compliance with the provisions of the Declaration (the instrument(s) that created the cooperative and all other governing documents of the Association).
4. The ratio of delinquent assessments is within the accepted industry range.
5. The government and management of ACHC are open and transparent to the members of ACHC and allow for participation of all members in the conduct of the meetings of the Board and all committees.

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Mildrilyn S. Davis

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6. Both procedural and substantive due process is afforded to all members of ACHC in all actions that affect their interests.
7. ACHC Property is in a clean and sanitary condition, landscaping is in good order and a qualified engineer has conducted a reserve study on which ACHC has based its budget and reserve contributions.

Our November 24, 2009 letter reviewed each standard and included recommendations for additional actions or policies which may be pursued in order to meet those criteria. We will review each criteria and recommendation separately below, discuss the proposed action by ACHC for each recommendation, and provide a brief analysis about whether the proposed action would allow a determination of whether ACHC was operating successfully.

1. **The governance and management of ACHC shall be in compliance with the provisions of Article 3 (Management of Cooperatives) of the Act.**

Recommendation: Request a description by the Board (or legal counsel) of the Board's authority to make unilateral changes to the maintenance and repair responsibility of ACHC and members.

As stated in our November 2009 letter, a cooperative that is operating successfully must have a clear, static delineation of the maintenance and repair responsibilities between members and ACHC. We cannot recommend that the City consider ACHC to be operating successfully unless such a clear delineation is established, in writing, in a document which requires member approval to amend.

Proposed Action: Amend the By-Laws to provide a clear delineation of the maintenance and repair responsibilities between members and ACHC.

In response to our recommendations, ACHC proposes a comprehensive amendment to the existing By-Laws and other documents governing the cooperative. On April 2, 2010, legal counsel for ACHC provided draft Second Amended and Restated By-Laws of the Arlandria Chirilagua Housing Corporation, Inc. ("By-Laws"), draft Articles of Restatement of Arlandria/Chirilagua Housing Corporation ("Articles"), and a draft Maintenance Responsibilities Chart to be included as Exhibit B to the By-Laws ("Maintenance Chart") for our review.

Based on our review of the By-Laws and Maintenance Chart, the proposed amendment to the By-Laws with the inclusion of the Maintenance Chart would satisfy our recommendation. Section 11.6.1 of the By-Laws provides that with two exceptions, "the specific maintenance responsibilities and the costs attributable thereto shall be determined pursuant to" the Maintenance Chart. The Maintenance Chart provides a clear delineation of the maintenance and repair responsibilities between members and the ACHC.

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Mildrilyn S. Davis
April 30, 2010
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In addition to providing a clear delineation, the By-Laws and Maintenance Chart establish the maintenance responsibilities in such a manner that the Board could not unilaterally alter the maintenance responsibilities provided by the By-Laws and Maintenance Chart. Article 9 of the By-Laws provides that the By-Laws and all Occupancy Agreements may be amended upon the vote of two-thirds of the entire regular membership at an annual or special meeting and that for as long as ACHC is a party to a loan with the City of Alexandria, all amendments to the By-Laws must be consented to by the City Manager.

The amendment provision of the By-Laws provides sufficient safeguards to protect our opinion that successfully operating cooperatives should have a clear delineation that is also difficult to unilaterally amend. We are encouraged by the provision of Article 9 which requires the consent of the City Manager prior to any amendment to the By-Laws

***Recommendation:** The boundaries between units and common elements should be expressly defined in some form of document amendable only with the consent of a large percentage of members (we recommend two-thirds of all members). This document should also expressly set out the maintenance, repair and replacement obligations of the members and ACHC and should correlate to the unit boundaries.*

***Proposed Action:** Amend the By-Laws to expressly define boundaries in the By-Laws.*

The By-Laws define "Dwelling Units" and "Common Elements" in a manner which expressly defines the boundaries between the Units and common area. Section 11.6.5 of the By-Laws provides that "Dwelling Units":

means portions of the buildings designed for individual occupancy as a residence, including the materials comprising the exterior face of unfinished walls bounding the unit, the concrete slab or subfloor below the finished floors or carpeting, and uppermost surface of the finished ceilings thereof, and any other fixtures, appliances or other apparatus designed to serve that residence only.

The definition of Dwelling Unit establishes the vertical and parametric boundaries of the Units at ACHC and, when combined with the Maintenance Chart and Article 9 of the By-Laws (dealing with amendments to the By-Laws), satisfied our recommendation.

***Recommendation:** In an effort to encourage ACHC to comply with "best practices" for a cooperative, the City should require that notices of all meetings of the Board be published where it is reasonably calculated to be available to a majority of the members, and that members be given an opportunity to speak in an open forum at meetings of the Board.*

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Proposed Action: *Amend the By-Laws to impose specific notice requirements on the Board.*

Section 4.4 of the By-Laws provides that for all meetings of the members:

The Secretary must post in the common areas of the Property, where everyone can see it, a notice of each annual or special meeting, stating the purpose, time and place of the meeting. The Secretary must also mail or deliver a notice to each Member of record, at least three (3) but not more than twenty (20) days prior to such meeting.

In addition to notices of all meetings of the members, we recommend that the By-Laws also require notices of all meetings of the *Board* be published where it is reasonably calculated to be available to a majority of the members, and that members be given an opportunity to speak in an open forum at meetings of the Board. Although these requirements are not provided for in the Act, the requirements are considered good business practices and essential for a cooperative to operate successfully.

In a telephone conversation this morning with Ed O'Connell, legal counsel for ACHC, Mr. O'Connell confirmed that he will revise the draft By-Laws to include provisions addressing our concerns about notice of Board meetings and an open forum for members to speak at such meetings. Once these revisions are made to the proposed By-Laws, this recommendation will be satisfied.

Recommendation: *ACHC should provide a written statement from its insurance carrier about: (1) whether ACHC complies with the provisions of Section 55-470 of the Act; or (2) the provisions of Section 55-470 which ACHC does not comply with; and (3) a statement that ACHC is adequately insured and whether any additional coverage is recommended by the insurance carrier.*

In response to our recommendation, we were provided with a letter dated January 18, 2010 from Patricia C. Robinson, Commercial Lines Account Manager for Preferred Insurance Services, Inc., which provides that "ACHC complies with Section 55-470 of the Virginia Real Estate Cooperative Act subject to the terms and conditions of this insurance policy." Enclosed is a copy of Ms. Robinson's letter along with an e-mail indicating that a copy was mailed to the City of Alexandria on January 19, 2010.

Recommendation: *The method for allocating common expenses to members should be set forth in a document similar to the delineation of maintenance and repair responsibility. This allocation may be included in the same document as the maintenance, repair and replacement obligation discussed above.*

Proposed Action: *Amend By-Laws to provide method for allocating common expenses*

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Section 3.1 of the Bylaws provides that:

Each Member has the duty to pay a proportionate share, which is based on the Common Element Interest of a Dwelling Unit, of these common expenses, on a monthly basis, as determined from time to time by the Board.

"Common Element Interest" is a common term used to establish the percentage share for which an owner in a cooperative is responsible. Section 11.6.5 of the Bylaws provides that "Common Element Interest" means the "interest assigned to the Member's Unit, which is determined by the square footage of the Unit." The By-Laws provide that the Common Element Interests of each Dwelling Unit will be described in Exhibit A to the By-Laws. We were not provided with Exhibit A to the By-Laws and recommend the City review that Exhibit prior to the amendment of the By-Laws.

***Recommendation:** The City should require ACHC to adopt a written resolution setting forth the procedure and parameters for terminating membership.*

***Proposed Action:** Provide a collections policy through which the Board may terminate membership in the cooperative.*

As we provided in our November 2009 letter, reducing the termination policy to a written resolution provides specific parameters by which ACHC may terminate membership and provides an additional layer of protection for ACHC members.

Legal counsel for ACHC provided us with a draft collections policy to review. The collections policy provides that if payment of any charge is not paid by the tenth day after the due date, it is delinquent, and a late fee of \$50.00 is added to the account, and the managing agent shall send a Late Notice to the delinquent owner. If payment in full is not received within twenty days of the due date, the managing agent must send a Notice of Hearing; a hearing shall occur no sooner than ten days after the Notice of Hearing, at which time the Board may:

- Refer the account to the Corporation's legal counsel for collection of the balance and eviction proceedings.
- Charge a collection fee to the Member's account, which shall include an initial referral fee and a monthly fee for providing updated information to legal counsel for the Corporation; and,
- Refuse to accept further payments from the Member, but will direct the Member to make payments to legal counsel for the Corporation and will advise legal counsel for the Corporation of all "lock-box" payments made on the delinquent account.

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Mildrilyn S. Davis
April 30, 2010
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The collections policy provides specific time frames after which certain actions will be taken. As long as the collections policy is applied uniformly and similar situated owners are treated in a similar fashion, then ACHC's pursuit of delinquent accounts could be considered to be "successfully operating."

Recommendation: *The City should require ACHC to adopt written resolutions setting forth the procedure and parameters for retaining records of the cooperative and governing the inspection of books and records by members.*

Proposed Action: *Amend the By-Laws to include provisions related to access to the books and records of the Association.*

Section 11.3 of the By-Laws provides that the financial reports and membership records of ACHC are available for inspection at reasonable times by the Members, their authorized agents and attorneys.

Recommendation: *The City should require AAMCI to carry the blanket fidelity bond or employee dishonesty insurance required for licensure by the Common Interest Community Board.*

At the meeting between the City, the Board and management, management provide a Certificate of Liability Insurance which covers Crime, Employee Dishonesty, Forgery and Alteration, with an employee dishonesty limit of \$1,100,000.00. Section 54.1-2346 of the Code of Virginia requires that a community interest community manager, as that term is defined in the Code, must provide blanket fidelity bond or employee dishonesty coverage:

In an amount equal to the lesser of \$2 million or the highest aggregate amount of the operating and reserve balances of all associations under the control of the common interest community manager during the prior fiscal year. The minimum coverage amount shall be \$10,000.

While the managing agent's coverage significantly exceeds the minimum coverage amount, we are unable to determine whether the coverage carried by AAMCI meets or exceeds the statutorily imposed fidelity bond. A copy of the Certificate of Liability Insurance is enclosed (note that although the Certificate of Liability Insurance was current as of the date it was provided, the policy was set to expire March 18, 2010 - the City may wish to confirm its renewal).

Upon the successful amendment of the By-Laws and collections policy to a form substantially similar to those provided on April 2, 2010 for our review, ACHC will be established in a manner required for a determination that ACHC was operating successfully - without such an amendment, however, we are still unable to make a determination that ACHC is operating successfully.

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Mildrilyn S. Davis
April 30, 2010
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- 2. The documentation provided to a purchaser before execution of any contract for sale of a cooperative interest shall comply with Section 55-484 of the Act.**

Recommendation: Prior to the forgiveness of the Loan, the City should require that all potential purchasers of interests in the cooperative be provided with a resale certificate.

Proposed Action: Amend By-Laws to include requirement for resale certificate.

We were unable to locate a provision in the By-Laws requiring the provision of a resale certificate (or its equivalent). Without a resale certificate, a potential owner has no vehicle for determining the rights and obligations he or she will accept by purchase of a share in ACHC. In our opinion, the requirement for the provision of a resale certificate is as important to the successful operation of a cooperative as any other provision in the Act or By-Laws.

Without language imposing a requirement that ACHC provide a resale certificate upon the transfer of an interest in ACHC, we find it difficult to recommend that ACHC is (or can) operate successfully. In a telephone conversation this morning with Ed O'Connell, legal counsel for ACHC, Mr. O'Connell confirmed that he will revise the draft By-Laws to include provisions addressing our concerns the provision of a resale certificate. Once these revisions are made to the proposed By-Laws, this recommendation will be satisfied.

- 3. The governance and management of ACHC shall be in compliance with the provisions of the Declaration (the instrument(s) that created the cooperative and all other governing documents of the Association).**

Recommendation: The City should pursue additional information related to the lack of a recorded declaration and the existence of remaining copies of the additional offering statement.

The issues raised in our November 2009 have been addressed sufficiently and, with continued compliance with the proposed amended By-Laws, this criterion has been met.

- 4. The ratio of delinquent assessments is within the accepted industry range.**

We have not determined the current ratio of delinquent assessments within ACHC. In our experience, the accepted industry rate for successfully operating common interest community association delinquent assessments is between 3-5%. In more recent times, the acceptable range of delinquent assessments may actually be considered higher than 5%.

- 5. The government and management of ACHC are open and transparent to the members of ACHC and allows for participation of all members in the conduct of the meetings of the Board and all committees.**

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Mildrilyn S. Davis

April 30, 2010

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In our November 2009 letter, we recommended that:

- Members should have access to the books and records of ACHC;
- Members should be apprised, through adequate notice, of all meetings of ACHC, its Board and committees and members should be able to attend and participate in each meeting;
- Members should be able to review and ratify the budget for ACHC.

The By-Laws sufficiently address several of these issues (as described in detail above). However, the proposed amendment to the By-Laws has not addressed all of our concerns. If the By-Laws are amended as proposed by ACHC, including the addition of provisions discussed this morning with Mr. O'Connell, related to Board meeting notice and an open forum for members at Board meetings, this criterion will be satisfied.

With that said, the By-Laws do not provide that the members must ratify the budget (although they may review the corporate financial records. The omission of the members' authority to ratify the budget, by itself, is not significant enough to determine that ACHC is not successfully operating.

6. Both procedural and substantive due process is afforded to all members of ACHC in all actions that affect their interests.

The collections policy provides specific time frames after which certain actions will be taken. As long as the collections policy is applied uniformly, and similar situated owners are treated in a similar fashion, then ACHC's pursuit of delinquent accounts could be considered to be "successfully operating."

Generally speaking, the proposed By-Laws provide members with additional notification and opportunities to be heard. However, in order for us to determine this criterion has been met, we would require notice of ACHC Board meetings, an opportunity for owners to speak at meetings of the Board, and the provision of a resale certificate prior to the transfer of an interest in the cooperative. Legal counsel for ACHC has agreed to address each of these concerns by revising the draft By-Laws, and once completed, this criterion will be satisfied.

7. ACHC Property is in a clean and sanitary condition, landscaping is in good order and a qualified engineer has conducted a reserve study on which ACHC has based its budget and reserve contributions.

Recommendation: Upon CMC's site inspection and review of the budget and financial statements of ACHC, the City should determine whether ACHC is operating successfully.

Proposed Action: Allow a common interest community management company engaged by our office to review and evaluate the financial records of ACHC and ACHC facilities.

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Mildrilyn S. Davis

April 30, 2010

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MercerTrigiani recruited the assistance of Thomas S. Patti, President of CMS Services, Inc. ("CMS") to assist in the review of ACHC's financial records and facilities. CMS is a common interest community management company licensed to provide management services to common interest communities in Virginia. In operation since 1984, CMS is well-respected in the industry and extremely capable of providing review and evaluation services.

On March 17, 2010, Mr. Patti, accompanied by Jeff Draper, CMS Community Manager, and Jerry Green, CMS Controller, reviewed the provided 2007 and 2008 audits and the January and February 2010 financial reports for ACHC and conducted a walk-through of the facilities operated and maintained by ACHC. Although Mr. Patti provided an informal summary of his findings by electronic mail, a more formal review will be provided separate from this letter.

This letter is a privileged communication between attorney and client. It should be kept separate and apart from the books and records of the Association normally made available for public view.

Yours truly,



Jeremy R. Moss

jrm

Enclosures

cc: Christina Z. Brown, Assistant City Attorney
David S. Mercer, Esquire

#39432

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Arlandria Chirilagua Housing Cooperative 2011

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Mission and Objective for 2010-2011

As American Apartment Management (AAMCI) and the New Board of Directors took charge in the fall of 2009 the course of the property's management took a different direction to improve the conditions of the property, comply with all state and local housing laws, and to secure the future of the Cooperative in the City of Alexandria.

Per our By Laws we remain our objective as being “ The Purpose of the Corporation is to provide it’s Members with housing and a community facilities on a non profit cooperative basis consistent with the Articles of Incorporation.”



Arlandria Chirilagua Housing Cooperative
2011

ACHC Playgrounds and Parks

- Neutral Color Scheme
- Company produces, warranties, and installs products for easier future maintenance and repairs
- PVC Benches and trash receptacles last longer



EAGLE PLAY STRUCTURES®

DIVISION OF SPORT SYSTEMS, LLC
 10078 TYLER PLACE
 IJAMSVILLE, MD 21754
 301-604-4747
 FAX 301-607-4484



SCOTT MURPHY
 301-607-4747 ext. 17

FOUR MILE
 Site Plan

Replacement of Parks: The playgrounds located at 3200 Commonwealth Avenue and Four Mile Road are in need of replacement. We have looked at three companies that install residential property tot lots and playgrounds and the above design from Eagle Play Structures works best with the Budget and space we have. The price range is in the low 20's with PVC benches, swings, and toddler ground play area all included. Date project to be started July 2011. Completion of this project will be in the Fall of 2011

Roof Repairs and 2011 Schedule

3911 Bruce Street A & B (\$2,900)

Resealed slag stop of entire building and resealing 2 Ply of cement and fabric to reinforce roofing. Installation of Roof Vents (total 6) resealed areas where plywood was replaced. Soffit Replacement around entire roof.

Unclogging scuppers and cleaning of: (\$825.00)

3917 Bruce Street

3910 Bruce Street

21 3917,3919, 3921 Elbert Avenue

517, 518, 519 Four Mile Road

3917, 3919, 3921 Elbert Avenue & 402 Four Mile Rd. (\$6,000)

Flashing Repairs and resealing lapses on roof hatches. Installation of aluminum coat on all flashings, pipe flanges. Remove all debris from roof.



AvidSuite: Invoice Search - Windows Internet Explorer

https://app.avidxchange.net/AvidSuite/Portal/DesktopDefault.aspx

property.

Due Date: Due End Date:

Invoice Amount: Invoice End Amount:

Enterprise Code Group: Enterprise Code Value: to no range

Search Clear

Invoice No	Property	PO Number	Invoice Date	Supplier	Status	Ordered By	Invoice Amount
020611-098	Arlandria Chirilagua		Feb 6, 2011	VERSATILE ROOFING AND WATERPROOFING	Approved		\$1,925.00
ARC-110410	Arlandria Chirilagua		Nov 4, 2010	VERSATILE ROOFING AND WATERPROOFING	Approved		\$6,400.00
C-112	Arlandria Chirilagua		Nov 4, 2010	VERSATILE ROOFING AND WATERPROOFING	Voided		\$6,200.00
C-111	Arlandria Chirilagua		Oct 4, 2010	VERSATILE ROOFING AND WATERPROOFING	Approved		\$825.00
100410-Deo	Arlandria Chirilagua		Oct 4, 2010	VERSATILE ROOFING AND WATERPROOFING	Approved		\$3,500.00
3912-3917	Arlandria Chirilagua		Oct 4, 2010	VERSATILE ROOFING AND WATERPROOFING	Approved		\$9,500.00
C-109	Arlandria Chirilagua		Sep 14, 2010	VERSATILE ROOFING AND WATERPROOFING	Approved		\$525.00
ARC-82010	Arlandria Chirilagua		Aug 20, 2010	VERSATILE ROOFING AND WATERPROOFING	Approved		\$650.00
ARC-082010	Arlandria Chirilagua		Aug 20, 2010	VERSATILE ROOFING AND WATERPROOFING	Approved		\$2,900.00

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Arlandria Chirilagua Housing Cooperative
2011

From August 2010 till the present we have invested \$26,000 in our roofs in repairs, maintenance, and reinforcing projects.

*2011-2012 3200 Commonwealth Avenue and 517-19 Four Mile Road await completion

Roof Repairs and 2011 Schedule

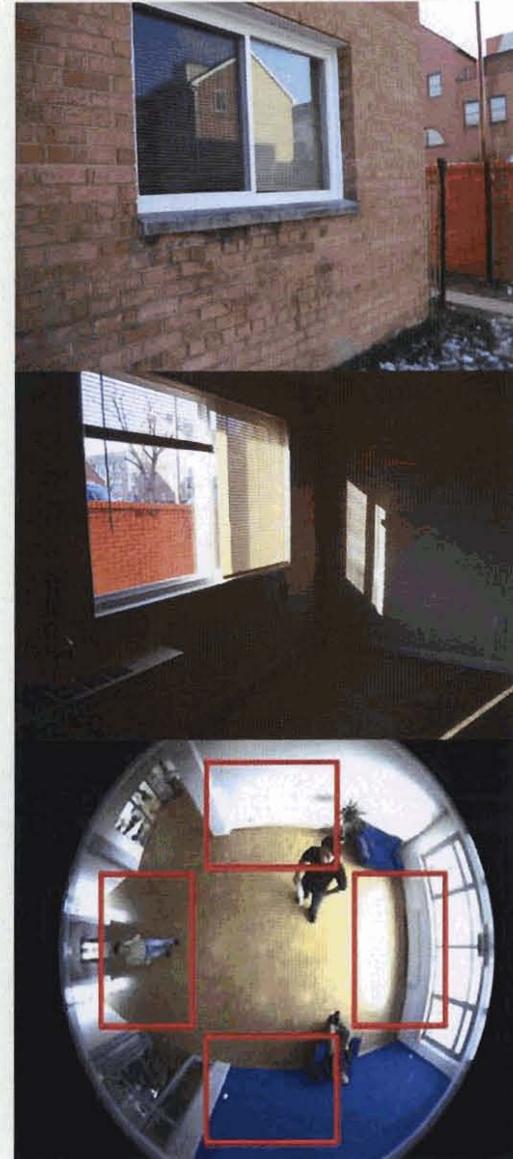
519 Four Mile Road :

Resealing of Scubbers , Repair of flashing with 2 ply's of cement and fabric at right corner of building.

Windows, railings, smoke detectors, and cameras

- Replacements of 3200 Commonwealth Ave Windows (101 Windows on four levels with full warranty for life with the exception of screens)
- Smoke Detectors installed on all top floors to all buildings
- Cameras Installed to 3200 Commonwealth Avenue (6 Cameras)

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Replacements of Kitchens, Refrigerators, and HVAC Units

From June 2010 through the present we have replaced:

1. approx 43 Refrigerators
2. approx 30 Kitchen Ranges
3. approx 64 HVAC Units

4. Other Maintenance Repairs

Work Orders: 3,000 work orders completed by maintenance staff since December 2009

- Common area lights repaired
- Replacement and repairs of railing and installation of new railings to 3911 Bruce Street , 3921 Four Mile Road, and 3200 Commonwealth Ave.
- Termite treatment done to Bruce Street and Four Mile Road. All buildings have been inspected and following an annual inspection schedule



ht

Common Area Exterior Projects and Projects awaiting Completion for 2011-2012

- Waterproofing Basements and replacement of sump pumps with auxiliary sum pumps to each basement as needed
- Recement entrances and stairs to Building entrances
- Replacement of Building Entrances Including doors, Window treatments, locks, and frame.
- Renovation of hallways, including replacement of stair treads and flooring as needed
- Repair of all electrical fixtures, signs, and lighting to maintain uniformity in property



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ACHC Renovation of Interiors

Since Winter of 2010 we have renovated 25 units. These renovations are done from the flooring to the ceilings and the insulation of the exterior walls which also include:

- Replacement of carpets, foam, and repairs to floors below.
- Ceramic flooring in the entrance hallway, kitchen, and bathroom.
- Replacement of Range, Refrigerator, and Oven/ range hood
- Replacement of Bathroom tiles, bathroom vanity, sinks, and full repair of all plumbing needs. Replacement of all plumbing fixtures and commodes.
- Repair, priming and repainting of all walls
- Repair of all electrical and HVAC needs and installation of new HVAC units as needed.



Additional images of Renovations



Arlandria Chirilagua Housing Cooperative
2011

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Arlandria Chirilagua Housing Cooperative
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Arlandria Chirilagua Housing Cooperative
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Arlandria Chirilagua Housing Cooperative
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Arlandria Chirilagua Housing Cooperative
2011

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Arlandria Chirilagua Housing Cooperative
2011

APPENDIX A

IMMEDIATE REPAIR SCHEDULE & TWELVE YEAR REPLACEMENT RESERVE SCHEDULE

DRAFT

CONNOR

EVALUATOR'S SUMMARY

Immediate Physical Needs

Project: Arlandria Chirilagua Cooperative Address(es): 3910 Bruce Street Age(yrs): 38-71 # of Units: 281 # of Buildings: 22				
Item	Quantity	Unit Cost	Total Cost	Comments
Re-establish grade and water proof basements	1	LS	\$80,000	Water intrusion basements throughout site
Replace damaged fencing at the front of 3919 Building	1	LS	\$1,100	
Refurbish common hallway and landings	44	\$2,400	\$105,600	Currently in process now
Replace damaged/bent metal hand railing adjacent to Building 3911	1	LS	\$1,400	
Replace broken glass throughout the property	1	LS	\$12,000	Throughout Project Site
Remediate suspected mold growth in units 105, Buildings 3913 A, & 3915 A	1	LS	\$7,500	

Total	\$207,600
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EVALUATOR'S SUMMARY
REPLACEMENT RESERVE

Project: Arlandria Chirilagua Housing Cooperative
 Address: 3910 Bruce Street
 # of Units: 281
 # of Buildings: 22
 Age: 38-71
 Family: Yes
 Elderly: No
 Mortgage Term: 10+2

Item	Description	Expected Useful Life	Effective Age	Remaining Useful Life	Total Quantity	Unit	Quantity Replaced	% Replaced	Unit \$	Total Replacement Cost	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6
SITE																
1	Asphalt Repair / Seal Coat / Striping	7	5	2	9,733	Syd	19,466	200%	1.65	\$ 32,119		16,059				
BUILDING EXTERIOR																
1	Flat Roofing	20	Varies	Varies	494	Sq	220	45%	375	\$ 82,500			20,625			20,625
2	Exterior Masonry Repair, Painting, & Caulk	7	4	3	22	EA	44	200%	6,500	\$ 286,000			143,000			
COMMON AREA																
1	Refinish Common Area Stairs & Landings	7	1	6	44	Ea	44	100%	2,400	\$ 105,600						52,800
DWELLING UNITS																
1	Carpeting	7	Varies	Varies	249	Unit	298	120%	850	\$ 253,300	21,108	21,108	21,108	21,108	21,108	21,108
2	Kitchen Vinyl Flooring	15	Varies	Varies	281	Unit	160	57%	300	\$ 48,000	4,000	4,000	4,000	4,000	4,000	4,000
3	Refrigerators	15	Varies	Varies	281	EA	100	36%	400	\$ 40,000	4,000	4,000	4,000	4,000	4,000	4,000
4	Ranges	20	Varies	Varies	281	Ea	120	43%	285	\$ 34,200	4,275	4,275	4,275	4,275	4,275	4,275
MECHANICAL																
1	Water Heater Central	15	Varies	Varies	15	Ea	7	47%	3,500	\$ 24,500		3,500			7,000	
2	Domestic Water Boiler	20	Varies	Varies	4	Ea	2	50%	12,000	\$ 24,000						12,000
3	HVAC Replacement / Repair	20	Varies	Varies	1	LS	12	1200%	6,500	\$ 78,000	6,500	6,500	6,500	6,500	6,500	6,500
TOTALS											39,883	43,383	203,508	39,883	46,883	125,308
2.5% INFLATION PER YEAR											1.000	1.025	1.051	1.077	1.104	1.131
TOTAL COST PER YEAR											39,883	44,468	213,811	42,950	51,750	141,775
TOTAL COST PER UNIT PER YEAR											142	158	761	153	184	505

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EVALUATOR'S SUMMARY
REPLACEMENT RESERVE

Project: Arlandria Chirilagua Housing Cooperative
 Address: 3910 Bruce Street
 # of Units: 281
 # of Buildings: 22
 Age: 38-71
 Family: Yes
 Elderly: No
 Mortgage Term: 10+2

Item	Description	Expected Useful Life	Effective Age	Remaining Useful Life	Total Quantity	Unit	Quantity Replaced	% Replaced	Unit \$	Total Replacement Cost	Year 7	Year 8	Year 9	Year 10	Year 11	Year 12	TOTALS
SITE																	
1	Asphalt Repair / Seal Coat / Striping	7	5	2	9,733	Syd	19,466	200%	1.65	\$ 32,119			16,060				32,119
BUILDING EXTERIOR																	
1	Flat Roofing	20	Varies	Varies	494	Sq	220	45%	375	\$ 82,500			20,625			20,625	82,500
2	Exterior Masonry Repair, Painting, & Cat	7	4	3	22	EA	44	200%	6,500	\$ 286,000				143,000			286,000
COMMON AREA																	
1	Refinish Common Area Stairs & Landing	7	1	6	44	Ea	44	100%	2,400	\$ 105,600	52,800						105,600
DWELLING UNITS																	
1	Carpeting	7	Varies	Varies	249	Unit	298	120%	850	\$ 253,300	21,108	21,108	21,108	21,108	21,108	21,108	253,300
2	Kitchen Vinyl Flooring	15	Varies	Varies	281	Unit	160	57%	300	\$ 48,000	4,000	4,000	4,000	4,000	4,000	4,000	48,000
3	Refrigerators	15	Varies	Varies	281	EA	100	36%	400	\$ 40,000	4,000	4,000	4,000	4,000			40,000
4	Ranges	20	Varies	Varies	281	Ea	120	43%	285	\$ 34,200	4,275	4,275					34,200
MECHANICAL																	
1	Water Heater Central	15	Varies	Varies	15	Ea	7	47%	3,500	\$ 24,500		7,000			7,000		24,500
2	Domestic Water Boiler	20	Varies	Varies	4	Ea	2	50%	12,000	\$ 24,000						12,000	24,000
3	HVAC Replacement / Repair	20	Varies	Varies	1	LS	12	1200%	6,500	\$ 78,000	6,500	6,500	6,500	6,500	6,500	6,500	78,000
TOTALS											92,683	46,883	56,233	178,608	38,608	64,233	976,100
2.5% INFLATION PER YEAR											1,160	1,189	1,218	1,249	1,280	1,312	\$ 289
TOTAL COST PER YEAR											107,484	55,730	68,515	223,057	49,422	84,279	1,123,125
TOTAL COST PER UNIT PER YEAR											383	198	244	794	176	300	\$ 333

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Attachment 4
701711659
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701711659
www.aamci.com

June 1, 2011

PAUL SEGAL
Asset Manager
Wells Fargo

Re: Action Plan, Annual Property Inspection conducted 11/22/2010
Arlandria Chirilagua Housing Cooperative
Loan No. 701711659

Dear Mr. Segal,

American Apartment Management Co., Inc. (AAMCI), as agent for Arlandria Chirilagua Housing Cooperative (ACHC) is providing this letter in response to the Annual Property inspection conducted by Michael Roberts on November 22, 2010 and to advise you of our Action Plan to address the items identified in your letter dated, February 28, 2011.

Per my email of March 1, 2011, many of these items were in progress and/or scheduled for repair, detail to follow in this letter. In addition a CNA was ordered from Connor Engineering and was completed on March 21, 2011, which was forwarded to you on May 11. The CNA identified \$207,600 in Immediate Repair Needs, which addresses many of the needs identified in both your letter and the six items recommended in Ron Kirby's (Associa) letter dated October 25, 2010, per his inspections on August 25 and October 20. The CNA also identified an inflated total of \$1,123,125 in Twelve Year Replacement Reserves, which will require a \$333 per unit per year deposit into the reserves. The project is currently placing \$420 per unit per year into the reserves. Our current balance in the reserves is approximately \$395,008, or \$1,391 per unit. The project is in good position to address the needs of the CNA going forward, including both immediate and twelve year needs without the need for a rent increase.

Additionally, the ACHC Board of Directors has expressed interest requesting a supplemental loan in an amount of approximately \$5.4 million to upgrade all of the unit interiors. To date, twenty-five units have been rehabbed at a cost of approximately \$15K per unit. It is my understanding that you were shown one of these units. If not, photos can be provided. The finish is Class A. The ACHC Board would like to finish the remainder of the units and install central AC in each. The estimated cost to rehab a unit and install AC is approximately \$20K. I have prepared a draft of a pro forma and forwarded it to Phil Morse and copied you. The pro forma assumes a rent increase of approximately \$55 to \$60 per unit per month to pay for the supplemental loan.

STATUS OF ACTIONS TO ADDRESS WELLS FARGO INSPECTION ITEMS

Excerpt from letter from Russell Fleming, President, American Apartment Management Company, Inc.

Apartment Interiors: Occupied units found to be in below average condition.

This was not identified in the CNA as an immediate need, but is reflected in the 12-year Reserves. It had been the practice under the prior ACHC Board for the residents to be responsible for their own repairs. Under the new ACHC Board, elected in November of 2009, the project started making basic repairs. The During 2010 and to date, approximately 1500 work orders have been completed, which addressed broken appliances, pest problems, plumbing, etc. The project reserves and monthly deposits are sufficient to address the needs as identified in the CNA. However, twenty five units have been completely rehabbed to a Class A finish. To bring the remaining units to the same standard will require a supplemental loan. Contact has been made with Phil Morse regarding the loan.

Building Exterior: 1) Brick spalling and tuck-pointing

This was not identified in the CNA as an immediate need, but is reflected in the 12-yr Reserves at a cost of \$286,000 to be completed in Year 3 and Year 10. Bids are being solicited. Two vendors have inspected property and we are awaiting bids.

Building Exterior: 2) Roof Repairs required on 7 roofs

These repairs have been completed with the exception one building. Estimated time to complete is within the next 60 days.

Building Exterior: 3) Remnant holes from HVAC's.

The windows were replaced a few years ago. They were custom designed to allow for individual window AC units. When AC units are removed they are replaced with a glass pane at a cost of \$70 per window. In some cases, when resident intends to replace AC unit, then a temporary panel is installed. These temporary panels have not always been consistent. Management has replaced the ones that were in most critical condition. This was not addressed in the CNA. A permanent solution is being evaluated.

Building Exterior: 4) Graffiti

I did not observe any unaddressed graffiti during my visit last Friday, May 27. Painting will be addressed with refurbishment of the common hallway and landings throughout the property per the Immediate Needs of the CNA.

Building Exterior: 5) Building Entry Doors

The entry doors throughout the property will be repaired or replaced with the refurbishment of the common hallway and landings per the Immediate Needs at an estimated cost of \$107K per the CNA.

Other: 1) Metal railing lose/missing near Commonwealth Bldg.

This has been repaired.

Other: 2) Water intrusion in basements of (3910, 3912, 3914, 3915, 3913).

This is included in the Immediate Repair Needs of the CNA and will be completed within the next 90 days. Bids were taken last winter and are currently being updated.

Mildrilyn Davis

Subject: FW: REMINDER: I need photos and electronic copy of Powerpoint
Attachments: ACHC Repair and Renov 2011.pptx

-----Original Message-----

From: Rusty Fleming [mailto:rfleming@aamci.com]
Sent: Friday, June 17, 2011 10:15 AM
To: Mildrilyn Davis
Cc: Karla Ferrel; Claudia Vita
Subject: FW: REMINDER: I need photos and electronic copy of Powerpoint

Mildrilyn,
Here are some additional notes per our meeting on Wednesday. I want to thank you again for coming to the property.



ENERGY GRANT

When considering the grant it is important to realize that the members will benefit from this directly by lowering their electric bills. The member occupancy charge is a pro rata share of operating expenses of the project, which includes gas, water and sewer. Therefore, lower utility expenses result in a lower occupancy charges. We have been able to operate the project more efficiently under the leadership of the current board, therefore, it has not been necessary to increase the charge over the past two years. We of course cannot go forever without raising the occupancy charges, but lower utility bills will help us offset increases in other areas as we go forward, allowing us to keep our charges as low as possible. As stated in our meeting, the project is depositing enough money into the reserves to meet the both the immediate and long term physical needs of the project as detailed in the CNA that was conducted in March. However, that does not include the energy saving repairs and upgrades that will be provided by the grant. In addition, the majority, if not all, of member household incomes are well below the AMI for the Alexandria MSA. Therefore, we seek your support in awarding the Coop this grant.

LEADERSHIP

American Apartment Management took over management of the project in August of 2009. I can attest that the leadership of the current board, effective December 2009, has been a positive and complete contrast to the leadership of the prior board. They are a pleasure to work with. One of the problems before was that there were members of the board that were also employees of the property. That is no longer the case. Since the new board took over there have not been any board members employed at the project.

I will be back in the office on Monday if you would like to discuss anything. Do you think it would be beneficial for me to attend the June 28 city council meeting? I am available by cell the rest of the day, if you need to call me, (865) 804-4355.

Regards,
Rusty