



# connected communities



# CREATING STABLE, CONNECTED, AND EMPOWERED COMMUNITIES





# DRIVING POSITIVE IMPACT

For nearly five decades, WinnCompanies has been one of the nation's largest providers of housing-based resident and community development services in affordable and mixed-income housing, supporting more than 300,000 individuals each year. In 2017, we asked a simple but vital question about our work in communities across the country:

***Are we making a meaningful, measurable difference in the lives of the people we serve?***

This question launched the creation of Connected Communities, WinnCompanies' non-profit operating foundation partnership centered on genuine community development.

Connected Communities supports our community teams, resident leadership, partners, and stakeholders in developing and implementing collaborative strategies that have measurable, positive effects on the residents who call the communities we manage home.

We partner with more than 3,000 service partners nationwide to connect our residents with programs, services, and resources that deliver measurable and meaningful results for individuals and families.

WinnCompanies was the first for-profit affordable housing development and management organization in the United States to receive the Certified Organization for Resident Engagement & Services (CORES) designation from Stewards of Affordable Housing for the Future (SAHF) for Connected Communities' "robust commitment, capacity, and competency in providing outcomes-focused resident services in affordable housing." This designation can be leveraged to qualify for Fannie Mae™ Healthy Housing Rewards-Enhanced Resident Services™ and is among the selection criteria for developers submitting competitive funding applications for low-income housing tax credits (LIHTCs) in six states.

## CONNECTED COMMUNITIES' CORE COMMITMENTS

**PEOPLE. We believe in people.** Connected Communities gives our residents, team members, and community partners the technology, tools, and training they need to understand, help, and involve their communities in making more opportunities for all. These collaborations create innovative interventions, programs, and networks to support community-led, positive impact. Through annual community surveys and results tracking, our teams and community partners use data and analytics to understand challenges, meet people where they are, and educate and engage all stakeholders to create opportunities.

**PLACE. We believe in community-driven solutions.** We help each community figure out what success means to them and set meaningful goals for community development. Our teams use an evidence-based action planning approach to address typical structural hurdles prohibiting individuals from staying in their homes, starting with fundamental housing stabilization initiatives. From this point of stability, we build on the strengths of all stakeholders to prioritize resident interests and opportunities across our six outcome areas: housing, economic mobility, employment, health, education, and community engagement, as well as other specific areas identified by the community.

**PARTNERSHIP. We believe in collaboration and innovation.** Connected Communities works with more than 3,000 high-impact partners nationwide to help people and communities succeed. We are proud to be a preferred housing partner for nonprofit service providers, community organizations, and advocacy groups to develop and implement impactful and innovative programs, interventions, and solutions; By establishing linkage and service agreements, we help our partners expand their capacity, brand, and influence across our sizeable portfolio while utilizing their areas of expertise, evaluating the impact of their work, and forging reciprocal relationships.



# OUR **APPROACH**

## **ENSURING EACH COMMUNITY IS STABLE, CONNECTED, AND EMPOWERED.**

WinnCompanies believes that resident services can be much more than eviction prevention and resource suggestions; by collaborating closely with the community, local partners, and civic leaders, this work creates a real, lasting impact on the lives of residents. Connected Communities provides programs, services, and coordinated support to drive community impact in six key outcome areas across our national management portfolio:



**Housing  
Stability**



**Employment**



**Education**



**Community  
Engagement**



**Health**



**Economic  
Mobility**

For each community, we offer a set of core programs centered on positive, measurable outcomes, allowing our team, community leaders, and partners to see and understand the impact of our work together.

The following provides an overview of our national operations:

- A. CORE PROGRAMS:** Clear examples and overviews of the core programs, by outcome area, we provide nationwide;
- B. OUTCOMES:** Performance measures to understand the outcomes of programs and individual services;
- C. CASE STUDY BRIEF:** Example case studies of existing, high-impact programs, and;
- D. KEY PARTNERS:** Strong, national relationships we leverage (in addition to local partners) to deliver on the shared vision.



# HOUSING STABILITY

## HOUSEHOLDS NEED SAFE AND STABLE HOMES

### A. Housing Stability Core Programs

- Housing Stability Program: See the case study on the following page.
- Home Sweet Home Program: Designed to fully welcome new residents into the community and re-orient annually, the Home Sweet Home program offers a consistent engagement opportunity for all residents. Offered at move-in and renewal/recertification each year, the Home Sweet Home Program provides a thoughtful orientation and overview of the community, including an in-home orientation to understand apartment amenities, an overview of the household lease obligations and resident responsibilities, resources and services available as part of living in the community and financial hardship resources to support ongoing housing stability.
- Emergency Rent and Utility Support: Working with long-standing partners, our ERAP and Utility Support program coordination supports households facing financial hardship by directly assisting in hardship verification, ERAP applications, documentation assembly, and follow-up to ensure each eligible household benefits from city, state, and federal assistance programs.
- Reasonable Accommodation Coordination: Our management team works hand in hand with the community coordinators to ensure that reasonable accommodation requests are assessed, documented and processed, and implemented promptly to support the evolving needs of residents.
- Healthy Homes Housekeeping Program and Training: Our Healthy Homes program meets residents where they are to support healthy living alongside lease compliance. This innovative housekeeping inspection and support the program supports residents with hoarding challenges, reasonable accommodation needs, pest control issues, and other challenges that can result in lease violations or additional support.

### B. Housing Stability Indicators

- % of households with rental stability
- % of households with utility stability
- % of households with a safe and healthy home.





### C. Housing Case Study Brief: Housing Stability Program

As part of our ongoing commitment to housing stability, WinnCompanies has long recognized that preventing eviction requires many coordinated intervention strategies, support, services, and mutual accountability to work for residents and each community's ongoing operations.

During the COVID-19 public health pandemic, people and communities faced financial hardship and uncertainty on an unprecedented scale. This left thousands of people without stable housing and in fear of eviction. In March 2020, our team of property managers and community coordinators began work to implement our Housing Stability Program to support residents and property owners to stabilize struggling households and balance property collections. The program's primary components are: (1) resident education and outreach; (2) early intervention, communication, and coordinated financial help; (3) integrated payment plans; and (4) accountable legal support, with a focus on upstream intervention and

creative services.

Our staff worked with more than 60,000 residents facing financial hardship over the past year, taking ownership of emergency rental assistance applications and pre-filing mediation, resulting in more than \$55 million in rental relief to support the stabilization of 30,000 households across our national portfolio. Each year, WinnCompanies' Housing Stability Program expects to support an additional 10,000 households experiencing financial difficulties. This initiative has assisted our managed properties in becoming healthier, more resilient communities while satisfying the projected rent and cash flow commitments of the assets. In addition, throughout the pandemic, no evictions have been filed against WinnCompanies-managed households participating in the Housing Stability Program.

In the end, the goal of the program is to reduce filings and executions of evictions by 50% across our national housing portfolio through 2026.

### D. Key Housing Stability Partners

- U.S. Treasury
- The Eviction Lab
- State ERAP Administrators
- State Housing and Community Development Departments
- Resident Task Forces





# EMPLOYMENT

## WORK-ABLE ADULTS EMPLOYED AT LIVING WAGES

### A. Employment Core Programs

- Vocational Skills Training
- Unemployment Application and Renewal Assistance
- Skilled-Trade Apprenticeship Program Coordination
- Application, Interview and Placement Coaching
- Employment Referral Program
- Facilitation of Resident Opportunities and Self Sufficiency Program (ROSS) Enrollment
- Access to Childcare Programming
- Reentry and Employment for the Formerly Incarcerated

### B. Employment Indicators

- Increase in household earned income
- Employed rate of work for able adults





### C. Employment Case Study Brief: Maintenance Apprenticeship Program & Pre-Apprenticeship Program

WinnCompanies launched the Maintenance Apprenticeship and Pre-Apprenticeship Programs in 2018 to provide young people who live in the properties we manage with a direct path to education and employment in the facilities management industry. It is funded through a partnership between YouthBuild USA, a system of community colleges and technical institutions, and WinnCompanies. Our program partners give participants 18 months of training and help on the

job, specific hands-on learning models, in-class instruction, and certification while actively looking for new applicants in the communities we serve. WinnCompanies has directly recruited candidates from this exceptional prospect pool, establishing a sustainable community-to-career pipeline.

In 2023, we are currently recruiting for our fourth program class.

### D. Key Employment Partners

- YouthBuild USA
- Building Pathways
- Wentworth Institute of Technology
- International Institute of New England
- CONNECT
- Associated Builders & Contractors of multiple states
- Municipal Offices of Workforce Development





# EDUCATION

## CHILDREN AND YOUTH ARE COLLEGE OR CAREER READY

We aim to increase access and opportunity for residents and their families through quality, affordable early education, after-school and adult education programs, and collaborations.

### A. Education Core Programs

- Early Education Program Enrollment (on/off-site)
- After-School Program Enrollment (on/off-site)
- Summer Program/Camp Enrollment (on/off-site)
- WinningEdge Scholarship Program with uAspire
- FAFSA Assistance
- Adult Education Program Enrollment (on/off-site)
- ESL Program Enrollment Coordination
- ESOL Program Enrollment Coordination
- Senior Life-Long Learning Program Enrollment (on/off-site)

### B. Education Indicators

- # of Individuals enrolled in High School or higher education program
- # of Individuals who have completed High School or higher education program
- % of Youth enrolled in educational or positive youth development activities (after-school, youth enrichment, summer camp, early education, youth employment)





### C. Education Case Study Brief: Community Learning Pods

Partnerships with groups like the YMCA, Boys & Girls Clubs, after-school program providers, and others have helped us create high-quality, community-based early education, childcare, after-school, and teen programs for more than 15,000 students at Winn-managed communities nationwide. These critical services assist families in addressing career stability and childcare demands while growing and strengthening educational outcomes. In 2023, we are currently recruiting for our fourth program class.

### D. Key Education Partners

- YMCA
- Smart from the Start
- X-Cel Academy
- Boys & Girls Clubs
- Tech Goes Home
- uAspire
- YouthBuild USA
- Turn it Around
- United Way





# COMMUNITY ENGAGEMENT

**COMMUNITIES HAVE POWER, INFLUENCE AND AGENCY IN THEIR NEIGHBORHOOD**

## **A. Community Engagement Core Programs**

- Monthly Community Meetings
- Annual Community Assessments and Resident Feedback Sessions
- Participatory Budgeting Workshops
- Resident-led Community Programs
- Social Events/Activities (monthly)
- Census Outreach

## **B. Community Engagement Indicators**

- Increased % of households registered to vote
- Increased % of household members participating in community programs





### C. Community Engagement Case Study Brief: Our Homes, Our Votes

Since 2017, WinnCompanies' has partnered with the National Low-Income Housing Coalition's Our Homes, Our Votes initiative to register new voters, directly supporting residents' voices in their neighborhoods, states, and country. This program focuses on policy education, engagement, voter registration, and voter participation to make civic involvement more accessible for all. Between 2017 and 2022, WinnCompanies' voter registration campaign helped more than 25,000 new people register to vote in the communities we manage. This number is growing every day.

### D. Key Community Engagement Partners

- National Low-Income Housing Coalition
- Union Capital
- United Way
- Our Homes, Our Votes





# HEALTH

## HOUSEHOLDS HAVE HEALTHCARE AND CAN MANAGE THEIR WELLNESS NEEDS

### A. Health Core Programs

- Senior Home Care/Nursing Coordination
- Healthcare and Benefits Assessments and Navigation Support
- Behavioral Health Resource Coordination
- Addiction Support
- Mental Health First Aid
- Food Bank and Meal Program
- Evidence-Based Group Health
- Instructor-led Fitness Programs
- Instructor-led Nutrition Programs
- Well-being & Wellness Checks and Support

### B. Health Indicators

- Households who utilize primary care annually
- Households with health insurance
- Individuals who require assistance to meet ADLs are receiving assistance





### C. Health Case Study Brief: Health Care

Health matters. Across our national portfolio, our team focuses on family and senior healthcare access and utilization. In partnership with over eight Senior Care Options (SCO) programs, Aging Service Access Points (ASAPs), Area Agencies on Aging (AAAs), community health centers, and hospitals like Boston Medical Center and Virginia Commonwealth University Medical Center, our pilot programs have lowered annual emergency room visits and hospitalization rates by over 11% since 2018 while supporting health insurance access by 11%. Through these strong partnerships, focused healthcare enrollment, on-site rotational healthcare, coordinated care, and evidence-based community programming are regularly available to WinnCompanies' senior residents.

### D. Key Health Partners

- Senior Care Options (SCOs)
- Aging Service Action Points (ASAPs)
- Federally Qualified Health Centers (FQHCs)
- Hospital Systems
- United Healthcare





# ECONOMIC MOBILITY

## HOUSEHOLDS ARE FINANCIALLY SECURE AND ACHIEVE THEIR FINANCIAL/ECONOMIC GOALS

The opportunity for residents to remain in and grow within the community as it evolves is an essential component of mixed-income housing. WinnCompanies has a track record of managing toward this objective. We can keep this promise because we work hard to help people and families in our communities find jobs and move up the economic ladder.

### A. Economic Mobility Core Programs

- Financial Coaching
- Benefits Assessments and Enrollment
- Budget Support
- Representative Payee Coordination
- HUD Family Self-Sufficiency (FSS) Program Enrollment
- Credit Counseling
- Homeownership Education and Grants Coordination
- Volunteer Income Tax Assistance (VITA)
- Banking Navigation and Support

### B. Economic Mobility Indicators

- % of Households who can meet daily expenses and unexpected expenses
- % of Households with increased savings
- % of Households utilizing financial tools (bank account, budget, credit score, financial planning, home-buyer education)





### C. Economic Mobility Case Study Brief: Collaborative HUD Family Self-Sufficiency Program

WinnCompanies launched the nation's first collaborative HUD multi-family FSS program in 2019 across our Boston portfolio in partnership with Compass Working Capital and our amazing Community Development Corporation clients. We've been expanding ever since. The program creates a powerful tool that allows residents to set-aside rent increases based on increased income while supporting households with credit-building workshops, one-on-one financial coaching, and savings planning sessions to support their economic growth.

WinnCompanies believes in the power of the HUD FSS program and plans to grow the program across our national portfolio to benefit 250 new households each year.

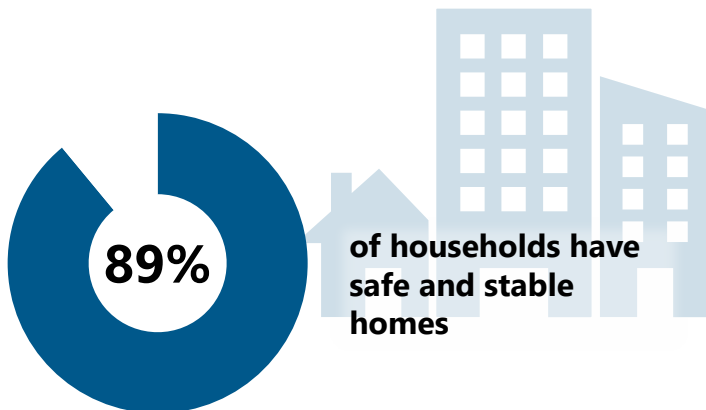
### D. Key Education Partners

- Compass Working Capital
- Credit Builders Alliance
- United Way of Massachusetts Bay and Merrimack Valley
- Bank of America Better Money Habits
- Union Capital
- Public Housing Authorities
- Boston Credit Union

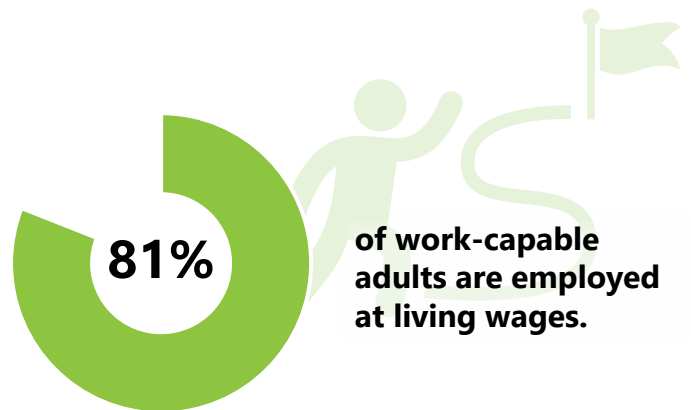




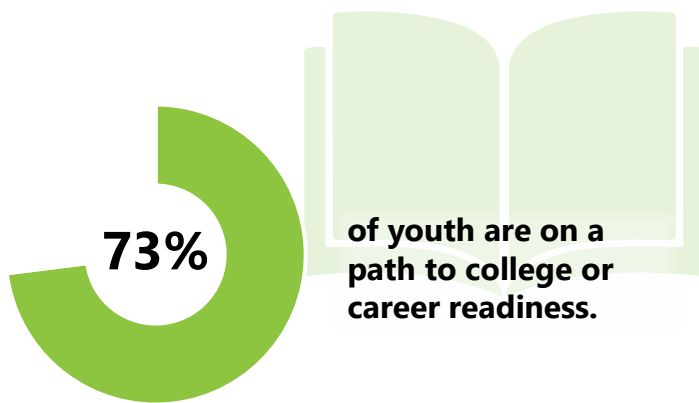
# REAL-WORLD **IMPACT**



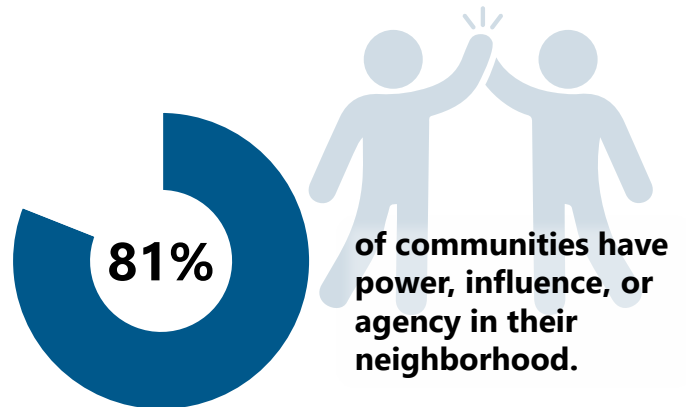
- **32,000** evictions prevented
- **\$55 million+** in emergency rental assistance (2020 – 2022)



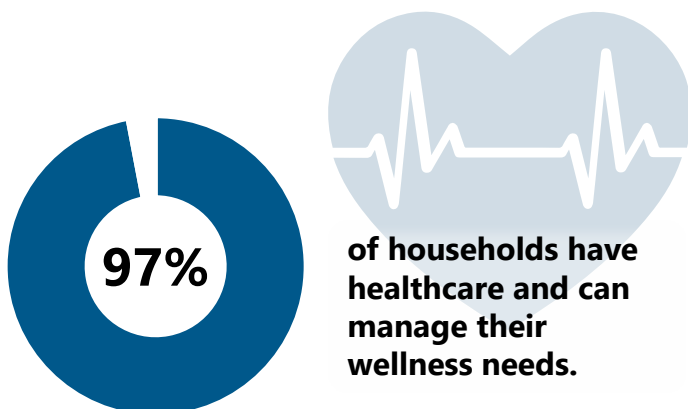
- **1,200** career placements
- **8,100 individuals** enrolled in employment counseling per year



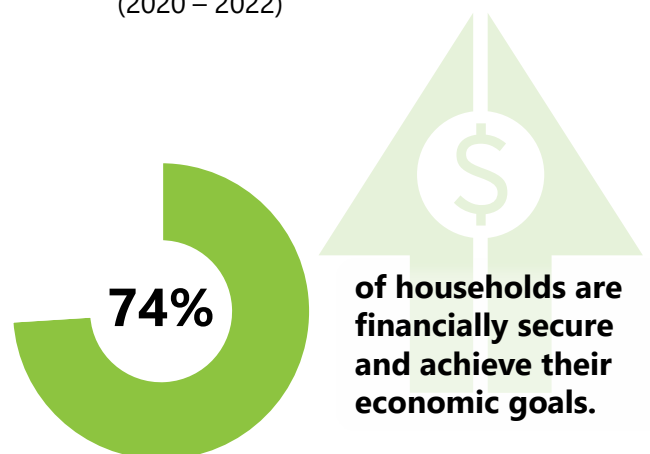
- **2,000** youth enrolled in high-quality early ed and after-school programming each Year



- **81%** adult voter registration.
- **22,000** new adults registered to vote (2020 – 2022)



- **97%** with health insurance
- **97%** utilize primary care annually



- **21 sites** with residents enrolled in HUD FSS program
- **5,000** households enrolled/re-enrolled in benefits each year

# MEASURING PERFORMANCE

## HOUSING

### Rental Stability

1. Households seeking rental assistance services
2. Rental assistance applications completed and submitted
3. Households approved for and receiving rental assistance

### Utility Stability

1. Households seeking utility assistance services
2. Utility assistance applications completed and submitted
3. Households approved for and receiving utility assistance

### Safe and Healthy Homes

1. Households receiving Healthy Homes interventions
2. Residents supported through Healthy Homes program
3. Residents with Healthy Homes hazards addressed

## EMPLOYMENT

### Professional Development

1. Residents referred to job education program
2. Residents enrolled in job educational program
3. Residents who completed job education program

### Professional Stability

1. Residents connected to formal employment opportunities
2. Residents secure part-time or full-time jobs
3. Residents employed for 180 days

*\*Residents over the age of 18*

## EMPLOYMENT

### Secondary Education

1. Residents seeking assistance to complete secondary education or pursue GED
2. Residents Enrolled in GED Programs
3. Residents who receive their GED

### Youth Activity

1. Young people referred to educational activities and achievement programs
2. Young people participating in educational activities and achievement programs

*\*Residents under the age of 18*

## CIVIC ENGAGEMENT

### Civic Participation

1. Households with attendance records
2. Survey results show feelings of trust in civic institutions

### Voter Registration

1. Unregistered residents seeking voting registration
2. Eligible residents who are registered to vote

## HEALTH

### Primary Care

1. Residents attending annual wellness visits
2. Residents connected to health services partners
3. Residents receiving routine medical care for chronic conditions and preventative care

### Health Insurance

1. Residents with health insurance, Medicare or Medicaid
2. Health insurance applications completed and submitted

### Assistance with Activities of Daily Living (ADL)

1. Residents with personal assistance services (PAS)
2. Residents connected to PAS partners
3. Residents receiving services for ADLs

## ECONOMIC MOBILITY

### Financial Tools

1. Households seeking financial case management
2. Residents supported with financial coaching
3. Residents using financial resources
4. Residents with savings accounts

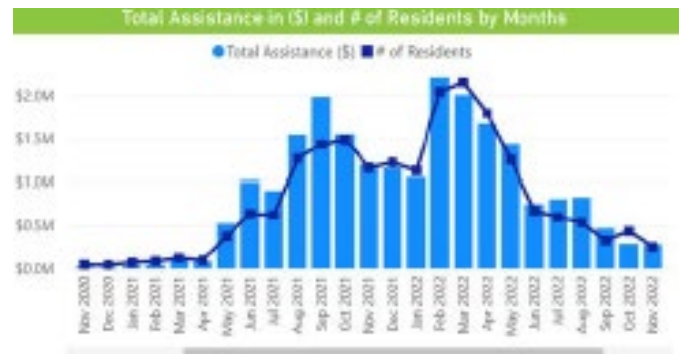
### Meeting Daily Expenses

1. Households seeking public assistance support
2. Public assistance applications completed and submitted
3. Households receiving public assistance



# REPORTING SAMPLES

Data matters. We pride ourselves on creating and continuously improving our interactive tools to see, understand, and engage with our mission. Engaging residents, team members, partners, and owner clients in our work's ongoing challenges, efforts, and outcomes is vital to our success in moving the needle on social impact within communities. Connected Communities offers an expansive suite of reporting, dashboards, and real-time data by household, property, and portfolio to drive positive outcomes everywhere we work.



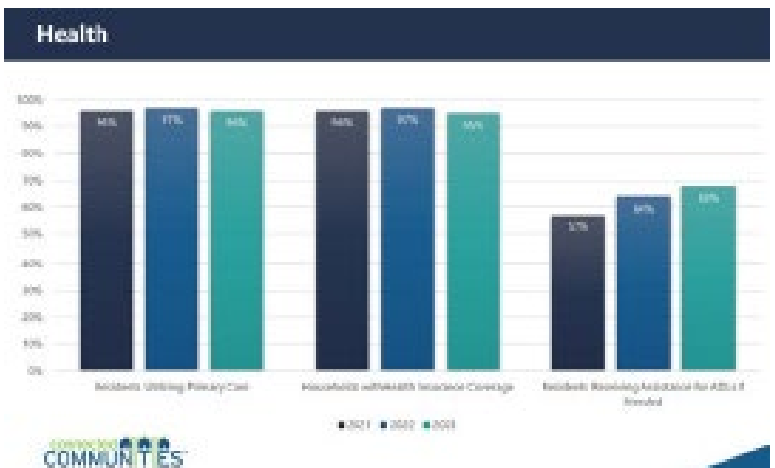
\*\* Emergency Rental Assistance Tracking: Portfolio (Housing Stability Dashboard)



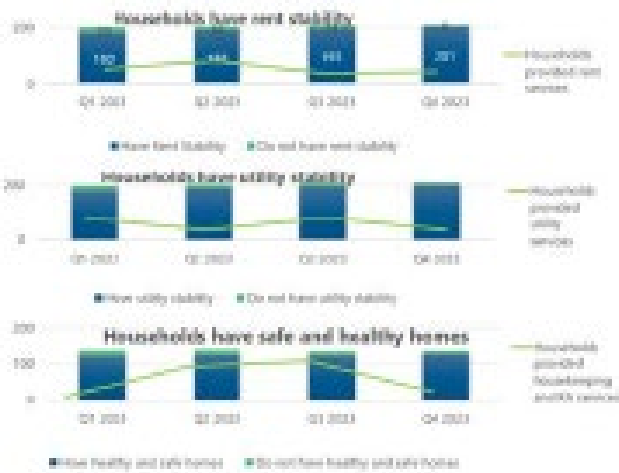
\*\* Core Program Activity Tracking by Property



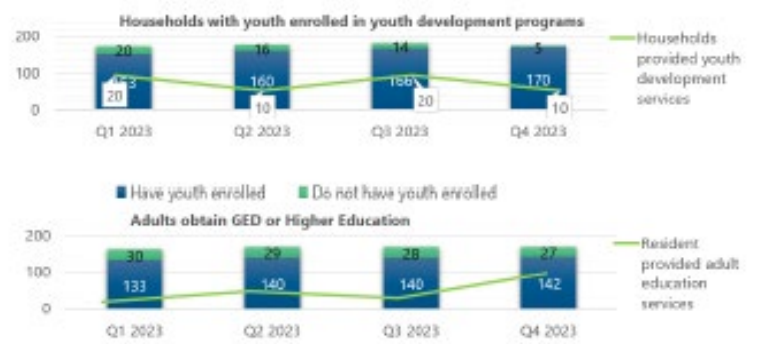
\*\* Coordinator Dashboard by Property- Outcomes Tracking- Example- Employment Outcomes



# REPORTING SAMPLES

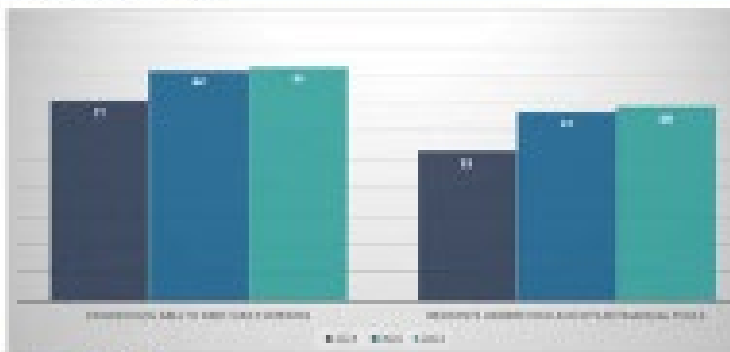


\*\* Coordinator Dashboard by Property- Outcomes Tracking- Example- Housing Stability- Quarter over Quarter



\*\* Coordinator Dashboard by Property- Outcomes Tracking- Example- Education- Quarter over Quarter

## Economic Mobility

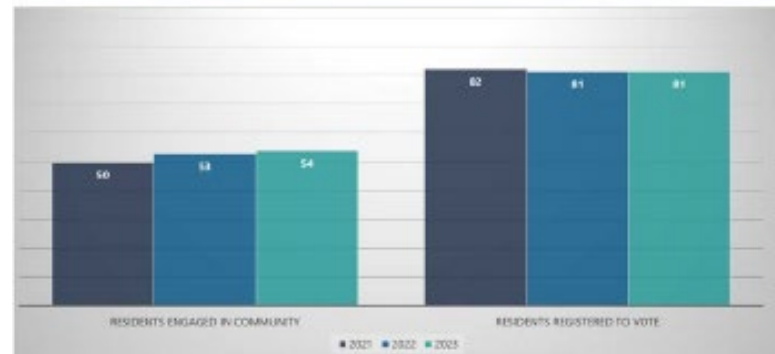


\*\* Owner Dashboard by Property- Outcomes Tracking Example- Employment Outcomes



\*\* Portfolio ERAP Mapping: CONNECT 360

## Community Engagement



\*\* Owner Dashboard by Property- Outcomes Tracking Example- Community Engagement/Voter Registration

**60**  
credit scores

Number of WinnCompanies residents who established a credit score

**66 %**

The percentage of WinnCompanies residents that saw a credit score improvement

**68 pts**

Average resident credit point improvement\* since enrollment

**646 pts**

Average credit score for a WinnCompanies opted-in resident.



# LEADERSHIP

## OUR BOARD OF DIRECTORS



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### WinnCompanies Members at Large

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Gilbert Winn: Director  
Larry Curtis: Director  
Terri Benskin: Director  
Angela Cisneros: Director  
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Steve DeTore: Director



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**TBD**  
Head,  
Operations



**SARAH PERKS**  
Head, Impact Support



**EDWARD CHIEN**  
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Mobility



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**Katie Baker**  
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**BRIANNA SURDI**  
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**Saudah Ahmad**  
Team Lead, Region 5



**Ping Zhou**  
Program Associate





