

<b>Category for Submission</b> Affordable Community	<b>Submitter Organization</b> Beacon Communities LLC
<b>Submitter Name</b> Dara Kovel	<b>Submitter Email</b> dkovel@beaconcommunitiesllc.com
<b>Community Name</b> Highland Glen	<b>Community Management Company</b> Beacon Residential Management Limited Partnership
<b>Number of Units in Community</b> 180	<b>Year Built or Rehabbed</b> 2018
<b>Community Address</b> 1055 Highland Glen Road Westwood, MA 2090	<b>If rehabbed, original year built</b> 1980
<b>Community or PM Email or Phone</b> averrochi@beaconcommunitiesllc.com	<b>Community Website</b> <a href="https://www.highlandglenapartmentsbc.com/">https://www.highlandglenapartmentsbc.com/</a>
<b>Community Social Media Handles</b> Twitter: @highlandglenapts Facebook: @HighlandGlenApartments	



**A description of the physical community. Include how floor layouts are effective, interior and exterior structure, amenities package, and how campus fits into the area.**

Highland Glen was constructed in 1980 under the Massachusetts 40B program by McNeil and Associates, Inc., a prolific builder of high-quality affordable housing in the 1970s and 1980s. Due to its

bucolic location surrounded by town forest, the property is a peaceful campus for its 62 and older and disabled residents. There are three buildings constructed of mostly of brick and concrete with ample common areas containing 180 Project Based Section 8 units for senior households. When the property was sold by Equity Residential in 2016, several building systems and exterior components needed repair. Additionally, the property interior finishes were in need of reimagination and replacement.

Prior to Beacon's rehabilitation, the ample community spaces were underutilized, primarily filled haphazardly with excess lounge furniture and outdated fitness equipment. With its Section 8 contract set to expire in 2020, the property was at risk of market conversion by other potential purchasers in 2016. Westwood Glen, another similar property in Westwood, had been recently purchased and was already under conversion to be fully market rate housing. Rather than risk a similar market conversion of Highland Glen, Beacon saw an opportunity to purchase the property, and to combine Massachusetts Chapter 40T, 4% Low Income Housing Tax Credits and the Section 8 Mark-up-to-Market process to access the necessary capital to rehabilitate the property and to preserve the property as affordable housing for all 180 households through 2040.

A large focus of the rehabilitation was upgrading and repurposing much of the property's common areas. Several lounges were refreshed with new finishes and furniture in all three buildings. Other prominent common areas of the largest building were converted to new spaces supporting Beacon's Wellness Program. These new spaces included a new dedicated fitness room, two dedicated wellness and resident services offices, a more flexible community meeting room, a multi-purpose learning room, an expanded kitchen and community space, an on-site salon and a completely renovated and more functional laundry room. New satellite fitness equipment was purchased and located in the two smaller buildings for ease of use by residents. Several outdoor common area improvements were included in the rehabilitation as well, including a large new patio gathering space which had not previously existed, a new community gardening space adjacent to an existing greenhouse, and a new building entrance, created to improve access from the two smaller buildings to the larger central building housing the majority of the wellness programming facilities. A significant part of the rehabilitation was dedicated to the apartment interiors, including substantially renovated kitchens and baths and flooring. Energy efficient electrical and plumbing fixtures were installed. Most notably, 5% of the apartments were converted to fully accessible units which were greatly needed by the population at Highland Glen. The photos included in this award submission illustrate how these improvements greatly enhanced both the feel and function of the property for this important population of senior and disabled residents.

**A description of the community's service to residents. Include how it serves the category population (student, etc.) Include customer service, maintenance schedules & philosophy and more.**

Highland Glen focuses on providing residents with exemplary customer service along with a comprehensive Wellness Program. With the addition of an RSC, the Highland Glen team has created an environment in which residents can access an abundance of services free of cost and from the comfort of their homes.

Highland Glen provides in-person and virtual methods to keep-in touch and address resident needs. Full-time office and maintenance teams facilitate real-time communication and problem resolution. After hours, maintenance is available for urgent and emergency needs via an automated answering service. Virtually, Highland Glen connects residents through Mobile Doorman, a community-based

messaging platform that allows for one-on-one and group communication. In addition, informational displays in common areas broadcast important bulletins, reminders and program schedules.

Related to wellness, Highland Glen is a community in which residents are easily able to age in place. In addressing physical wellness, three newly constructed spaces were created: a nursing/wellness suite, fitness center, and community kitchen/café. The wellness suite is comprised of three separate spaces. Highland Glen has engaged Suburban Healthcare, a nursing provider, to lend staff several days a week to provide services to residents such as; wellness exams, blood pressure/blood sugar testing, vaccination clinics, massage, physical therapy, dental exams and educational sessions for seniors.

The fitness center houses cardio and weight training equipment suited for seniors and available for residents to use at their leisure. Highland Glen has partnered with a personal trainer who provides instruction on proper fitness equipment use and form. In conjunction with the fitness center, Highland Glen offers a variety of fitness sessions including Chair Yoga, Stretching/Strengthening and classes for active older adults.

Keeping with the theme of physical well-being, the community kitchen/cafe offers residents meal services which include catered breakfasts and lunches. Along with these meals, Highland Glen has partnered with a local nutritionist to host monthly classes where residents learn to make healthy, easily prepared meals and a local agricultural organization to engage residents with a community garden.

To address social wellness, Beacon and Highland Glen created a Computer Learning Center that includes eight PCs, an all-in-one printer, and a large screen TV, suitable for group learning. Highland Glen has partnered with Connected Living, a social and educational tool that helps seniors to delve into technology as a means of connecting to the world. A Connected Living Ambassador guides residents in weekly, the med learning sessions with topics ranging from arts and culture to computer literacy and connecting virtually. Additionally, the Ambassador spends one-on-one time with residents to increase their familiarity and comfort level when using electronic devices such as laptops, tablets and smart phones. These programs compliment a robust social atmosphere, birthday celebrations, arts and crafts, monthly trivia and seasonal gatherings.

Highland Glen is currently expanding its customer service and programming to include WiFi and Alexa Dots in each apartment as an additional means of convenience and communication. These electronic devices will increase the connectivity of residents with family and friends, which has never been more important than during the COVID pandemic.

**A description of the community's impact on the local community. Include environmental awareness, occupancy rate/retention, local community involvement or service projects, and more.** As an affordable, senior/disabled property, Highland Glen offers its residents the ability to age in place while still maintaining their independence. With its on-site wellness programs and the flexibility of a PBS8 rent structure, Highland Glen is unique and stands alone as the only apartment home community in Westwood to offer these benefits. As a result, Highland Glen has become home to many life-long Westwood residents and is a first choice for local seniors looking to sell homes or downsize while remaining active members of their current community. The overall impact on the Town of Westwood has been to preserve this precious affordable housing resource.

This unique position has allowed Highland Glen to foster some significant relationships with local resources and groups, which provides a mutual benefit for Highland Glen residents as well as for the community. The most prominent of these relationships is with the Westwood Council on Aging (COA). Together, the Highland Glen team and the COA share numerous resources back and forth. As a benefit to Highland Glen residents, the COA provides transportation to and from medical appointments, grocery stores and the local senior center. Additionally, the COA's social worker works in tandem with the Highland Glen Resident Services Coordinator (RSC), to provide access to resources and assistance in areas that the Highland Glen team may not have otherwise been able to access. In appreciation of these services and resources, Beacon and Highland Glen actively participates in fund raising activities to help the COA maintain their operations. Additionally, Highland Glen and the COA frequently share contacts and vendors such as fitness instructors, nutritionists and other local service providers. This strong relationship has motivated Highland Glen residents to connect further with the COA, and for COA constituents to apply to live at Highland Glen.

Along with the COA, Highland Glen has also developed a collaborative relationship with the Westwood town library. By participating in the library's book club, Highland Glen can bring a librarian, and a series of books on site each month to serve its residents. This connection and exposure to library services has resulted in several Highland Glen residents volunteering their time and expertise at the library.

Another strong community connection is between Highland Glen and the Town of Westwood police and fire departments. Both town departments maintain a presence and connection to Highland Glen residents by hosting quarterly informational sessions consisting of important local updates and safety topics specific to the senior community. Some of the recent topics included identifying mail and phone scams and fire prevention measures related to the use of small appliances and power strips.

In addition to these community connections, Highland Glen also pairs with other Beacon properties to offer intergenerational programming. These programs provide an opportunity for seniors to connect with younger adults and children around predetermined topics to bridge the generation gap. These programs have proven beneficial both for the residents of Highland Glen, as well as for the residents of the other participating communities.

**A timeline of property history, development, important events or rehab of community.**

The rehabilitation of Highland Glen included three major phases, all guided by the goal of preserving and extending the existing affordability at the property. These phases included:

- 1) the sale process and financing on a bridge loan in 2016;
- 2) the tax credit application and syndication process in 2017; and
- 3) the actual construction period starting in the summer of 2017 and completion in 2018.

On December 15, 2016, Beacon Communities acquired the property from Equity Residential and embarked on its Section 8 Mark Up To Market and Low Income Housing Tax Credit syndication plan. Equity Residential's sales goals did not provide adequate time to implement a tax credit process prior to closing. Therefore, MHIC provided the bridge loan for the acquisition, and an affiliate of Charles River Realty Investors provided additional short-term equity while rehabilitation plans were finalized.

Charles River Realty Investors also purchased the 102-unit second phase of Highland Glen in December 2016. This second phase is located adjacent to Highland Glen and is now called The Residences at Highland Glen. While compatible in appearance, this second phase was constructed in 2007 for households that are 55 and older and 75% of the units are market rate. Operational and physical needs of the two projects are quite different and require separate financing approaches and ongoing coordination. The simultaneous legal separation and acquisition of the two properties previously commonly owned and operated by Equity Residential required local approvals and added significant additional complexity to the acquisition phase.

After acquisition, Beacon executed its preservation plan which included hiring a Resident Services Coordinator to implement enhanced services to residents prior to commencement of the rehabilitation. This provided valuable insight into the needs and preferences of the residents and influenced the rehabilitation plans prior to construction.

After completion of design work and financing applications, Beacon refinanced the property in August of 2017 and construction commenced. This refinancing included a long-term Section 8 contract from HUD, a loan under the HUD 223(f) program originated by Rockport Mortgage and MassHousing, 4% federal tax credits purchased by a proprietary MHIC fund with Citizens Bank as the investor, a tax credit equity bridge loan from Citizens Bank, and a short-term tax exempt bond from MassHousing with Stifel as bond underwriter.

Property renovations were led by The Architectural Team and Keith Construction and were completed in the summer of 2018. By early 2019 all tax credit equity had been placed in the project, and the remaining bridge loans and short-term bonds were repaid, thus completing the permanent financing phase of the project.

Since completion, additional program and amenity upgrades specific to the Wellness Program have been added. These on-going upgrades include expansive electronic connectivity to residents.

This community would not be possible without the dedicated work of many agencies on the federal, state, and local level, talented designers and builders, attorneys and accountants, project lenders and investors, visionary leaders, and many other critical team members.