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**Rochester Housing
Solutions**



THREEOAKS
COMMUNITIES

A Vision for Inclusive Housing Solutions in Oakland County

March 23, 2022 Update



Solutions for Adult
Interdependent Living

We're building a family community of differently-abled people with hopes and dreams for the future

Upcoming Meetings

- 1. April 6, 7pm:** Informational Meetings for Newcomers
- 2. Starting April 7, 7pm:** Office Hours every Thursday evening through May via Zoom
 - 15-minute presentation followed by “open mic” Q&A
 - Topic #1: Role of the Community Builder and Community Life Coordinator
- 3. Week of April 18:** Auburn Oaks Meet and Greet
 - Opportunity for those that have completed the TOC New Reservation Questionnaire to meet current Reservation Holders at Auburn Oaks

Updates since our last meeting on February 23

This deck includes the same general content that we presented on February 23rd. Updates include:

- Auburn Oaks site and floor plans
- HOA cost assumptions
- Additional slides based on feedback received:
 - ✓ Role of TOC vs RHS
 - ✓ Role of the Community Builder vs a Direct Support Professional (DSP)
 - ✓ How government funds such as SSI / SSDI may be applied

Points of Emphasis for Today's Meeting

1. The TOC and RHS Partnership
2. Role of the Community Builder and Community Life Coordinator
3. What government-funded direct care services we expect to be available
4. Homeowners Association (HOA) structure and fees
5. How government funds such as Medicaid and Social Security can apply
6. The Reservation Process



9/20/21

Why are we doing this?

We want a different life experience for our loved ones than traditional group homes typically provide today

How will our model provide a better experience?

Permanence

(and security that ownership can provide)

Independence

(Community Integration by design)

Sustainability

(Leveraging our scale, building strong family and community partnerships, and the active participation of family and other natural supports)

Our Journey

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2019

2022

2024+



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Discover

Research

Plan

Train /
Problem
Solve

Execute

Sustain

Is a Three Oaks Community (TOC) right for you at this time?

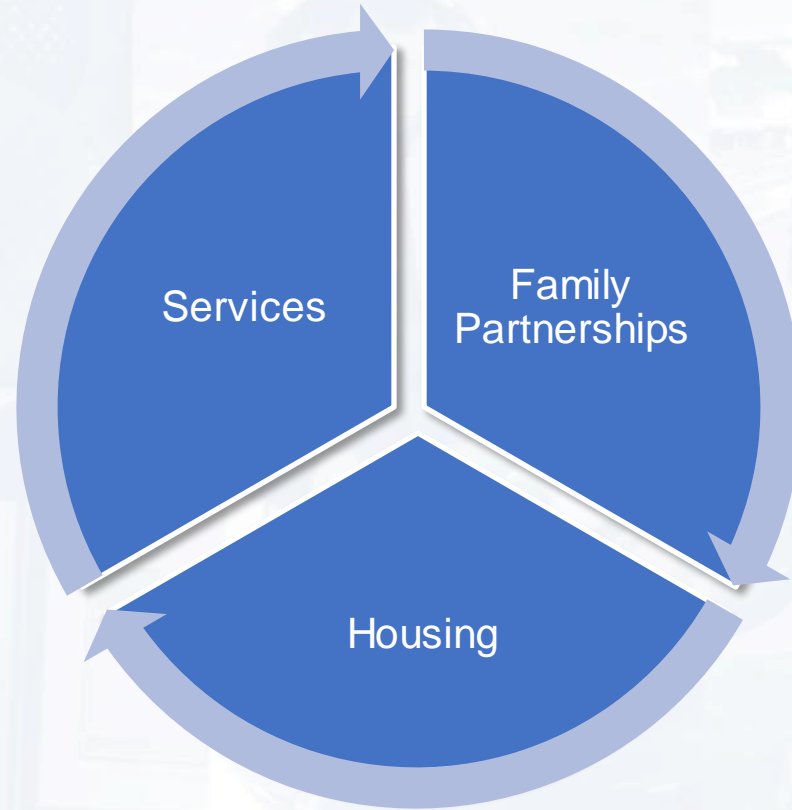
1. *Are you ready to make a sincere commitment to move?*
2. *Are you ready to invest significant time, energy, and money to create your Housing Solution?*
3. *Are you able to collaborate and openly share information with others?*
4. *Are you willing to let go of some control in the life of your loved one and prepare your child for more independent living?*
5. *Are you open to ALL caretaking responsibilities being completely taken over by a support staff?*
6. *Are you comfortable with other parents and staff members being in the home with your child?*
7. *Are you willing to allow others to set limits for your child?*
8. *Are you willing to allow others to assist your child with decision making?*
9. *Are you able to handle a healthy transition?*

See Appendix for additional insights on these questions

Keys to Success

3

Establish direct care and community integration services models that will keep our loved ones safe, healthy, fulfilled, and valued members within the neighborhood and the community at large



1

Build strong relationships among families and our IDD children that will endure over time

2

Partner with TOC to design and develop innovative housing solutions customized to the needs of our loved ones

The Need

Today, more than
5.4 million

individuals with I/DD are known to live in the home of a family caregiver (Tanis et al., 2020).

Almost 25%

or 1.3 million individuals—live in the home of a family caregiver over the age of 60.

From a longitudinal perspective,

~60%

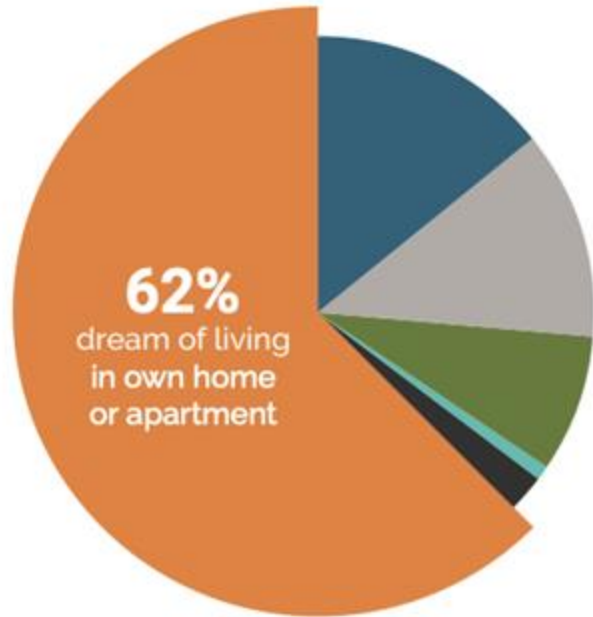
of those individuals live with a caregiver over the age of 41, suggesting there will be a large population of people living with an elderly caregiver in the next few decades (Tanis et al., 2017).

In addition,

50,000

people with autism are aging out of high school every year (Roux et al., 2017).

In a national survey by The Arc [2], people with I/DD and family members of people with I/DD identified a variety of dream homes:



- 14% Supervised group home or apartment
- 12% Home of a family member
- 8% Planned community or campus where only people with I/DD live
- 1% Host home
- 2% Other

Source: [A Place in the World](#), Dec 2020

The Urgency



- Do it now
- Tough, time-consuming
- Worth it!
- Families working together
- Engaged, “working” Board

“Where are those young adults going to live when parents are no longer able to care for them?”

The Challenges

1

Public Funding

- Public funding constraints are likely to persist or get worse.
- Ongoing quantity and quality of care funded by public funds is uncertain.

2

Staffing

- Availability of caregivers not likely to return to pre-COVID levels, which were already insufficient to meet the demand.

3

Time

- Our loved ones will continue to age. We need solutions that we can count on when we can no longer care for them on our own.

Innovative solutions developed through private-public partnerships are required to avoid the potential of catastrophic outcomes

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Our Partnership

How we are working together

- RHS is partnering with TOC to develop three inclusive neighborhoods in Rochester Hills
- We are leveraging best practices from the Center for Independent Futures (**CIF**) and other organizations to develop our services model
- Our goal is to:
 - Mobilize interested I/DD individuals, their families/guardians and investors
 - Apply best practices in the physical design of the neighborhood as well as the I/DD services model
 - Benchmark additional inclusive housing models
 - Develop innovative and sustainable funding models

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Roles and Responsibilities



- Pre-Development work and City Approvals
- Acquires and develops the land
- Builds the homes
- Establishes the Homeowner's Association (HOA)
 - HOA will be turned over to the homeowners in each neighborhood upon closing of at least 50% of the homes in each neighborhood.
- Provides contractual warranty services post-construction

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- Organizes and trains families and IDD individuals (owners and renters) interested in a TOC neighborhood
- Partnering with TOC in developing the:
 - Reservation process
 - Ownership model
 - HOA structure and budget
- Works with the families to understand:
 - How to obtain direct care services from the County
 - Assistive technology options
- Oversees the Community Life Coordinator and Community Builder Supports
 - Contracting, training, and supervision (which RHS may elect to outsource to a qualified agency)
- Fundraising

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Proposed Services Model

Our Service Model Objectives

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Integration

Foster lifelong relationships with other I/DD residents, the neighborhood, and the community-at-large

Choice

Provide a wide-array of learning and social activities that promote independence and safety

Best Practices

Leverage CIF and our own benchmarking to create a best-in-class, safe, and sustainable resident & caregiver experience

Efficiency

Create economies of scale to reduce cost and mitigate staffing constraints on OCHN as well as our residents and their families

Parent Involvement

Build community and a culture of servitude among our families in support of our residents and caregivers

Workplace of Choice

Make Three Oaks Communities a desirable place for caregivers to work and grow

Direct Support Professional vs Community Builder

Direct Support Professional

- Authorized by OCHN based on the Long-Term Service Supports (LTSS) assessment performed by MORC or CLS, which is used to determine the number of hours of service an IDD individual will be eligible to receive
- Addresses PCP / IPOS goals and facilitates Activities of Daily Life (ADL) and Instrumental Activities of Daily Living (IADL) based on individual need:
 - Food preparation / Feeding
 - Bathing / Dressing / Personal Hygiene
 - Medications
 - Shopping for essentials
 - Time and money management
- Transportation services
- Funding for skill-building, community integration, and workforce development programs

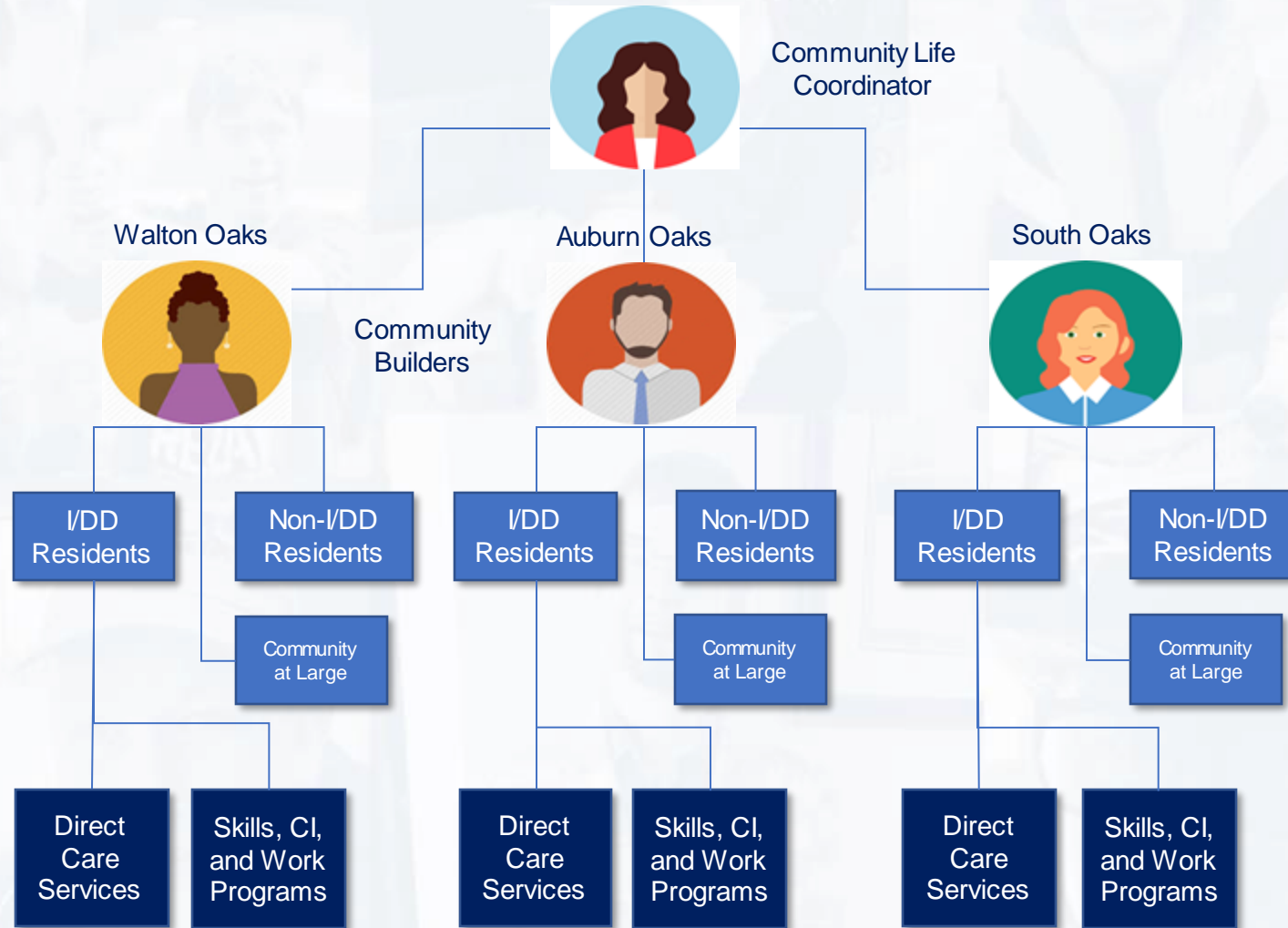
FUNDED BY MEDICAID

Community Builder

- Does not replace or duplicate any services provided by a DSP
- Companionship Services through fellowship and protection
- Lives onsite or nearby
- Managed by the Community Life Coordinator
- Key responsibilities:
 - Daily check-ins with residents (more if required)
 - Building community among the IDD residents, with other neurotypical families in the neighborhood, and the community at large
 - Help residents build supporting relationships with life enrichment activities focused on communication, problem-solving, feelings, and dealing with stress
 - Be a point-of-contact for residents, parents, agencies
 - Act as a 1st responder in emergencies or to help resolve issues / conflicts between residents, families, etc.

PRIVATELY-FUNDED
(included in HOA Fees)

Our Proposed Services Model



Community Life Coordinator

- Manages Community Integration Program (CIP) design & budgeting
- Oversees Community Builders, including training & support
- Liaise with residents, parents/caregivers to address needs & concerns
 - Monthly operations meetings
 - Attend Individual Plan of Service (IPOS) or other care planning meetings, as requested by the residents and/or their families

Community Builders

- Companionship services through of fellowship and protection
- Contribute to design and execution of the CIP
- Lives onsite or nearby for:
 - Daily check-ins with residents
 - Building community among residents
 - Be a point-of-contact for residents, parents, agencies
 - Act as 1st responder in emergencies or to help resolve issues / conflicts between residents, families, etc.

Funding

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- Personal funds from residents will pay for:
 - Purchase of the home or condominium
 - Community Life Coordinator position
 - Community Builder position
 - Training and tutoring services not covered under IPOS (e.g., ABA, Speech, Occupational Therapy)
- Public funds will pay for all Direct Care services that our I/DD residents would otherwise be eligible for within their IPOS
- Funding through donations and grants to support sustainability and access.

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Family Training

Steps to Readiness - 3 Year Plan

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Within each neighborhood, we will:

- Train I/DD reservation holders on our neighborhoods and how they operate
- Assist in forming friendships and community within each neighborhood, with other I/DD and non-I/DD residents, as well as with the community at large
- Provide access to skills assessments and other resources to ensure the readiness of each resident and their families to transition into their new home successfully
- Ensure each family works with their Supports Coordinators to align their respective IPOS goals
- Partner with OCHN, care providers, and other professionals to design an effective, efficient, and holistic services delivery plan
- Recruit Community Builders and Community Life Coordinator
- Facilitate opportunities to meet potential roommates, if desired

Training Timeline

NEIGHBORHOOD PREFERENCE RESERVATIONS

Reservation made

1

ORIENTATION TRAINING

Completed within 90 days

2

RHS 4-MODULE WORKSHOP

Completed within 6 months

3

INDIVIDUALIZED SKILLS ASSESSMENTS

Completed 60-90 days before move-in

4

ENRICHMENT TRAINING

Ongoing indefinitely

5

Steps 1, 2, 3, and 5 are included in training fee collected at time of reservation

Step 4 is paid directly by each family to the specialist of their choice

Reservation Holders attend **required** 2-hour orientation sessions, hosted by RHS and covering:

- Services Model
- Readiness Training Curriculum
- Individualized Skills Assessments
- HOA / Budget
- Other policies

Families attend 2-day workshop facilitated by certified trainer

Combination of online and in-person training

Groups of 5-8 families, from the same neighborhood

Must be completed before closing

Each family completes or updates an individualized skills assessment

Assessments such as SIS, MFL or AFLS will guide independent living skill goals, and CB-CLC services.

Optional ongoing tutoring services encouraged Fees vary and will be paid directly to credentialed specialist

Periodic family and resident readiness training and community building activities

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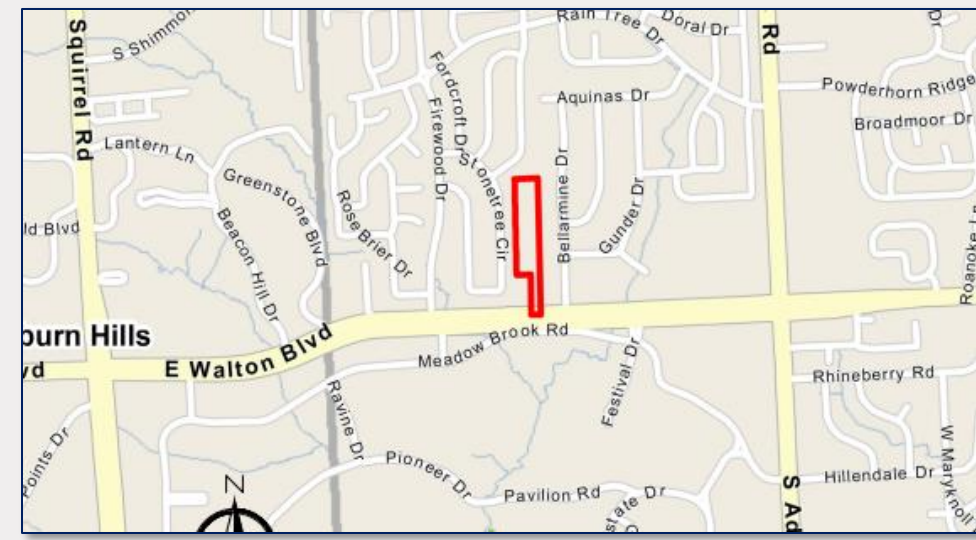
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Site and Floor Plans

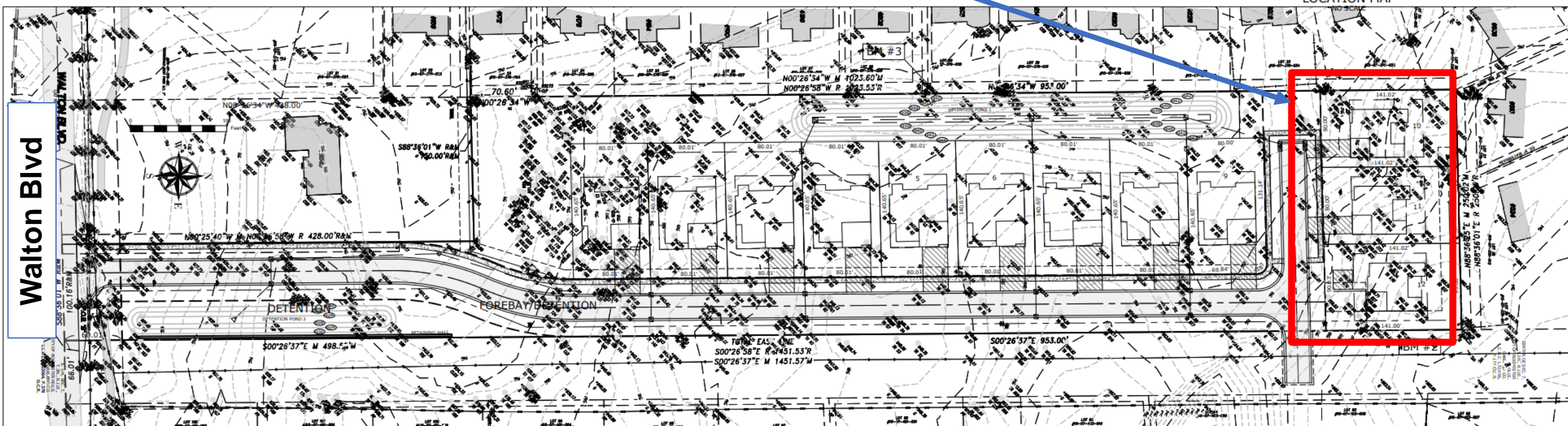
DRAFT

Walton Oak Site Plan (draft)

9 Market Rate Homes
3 IDD Cottages

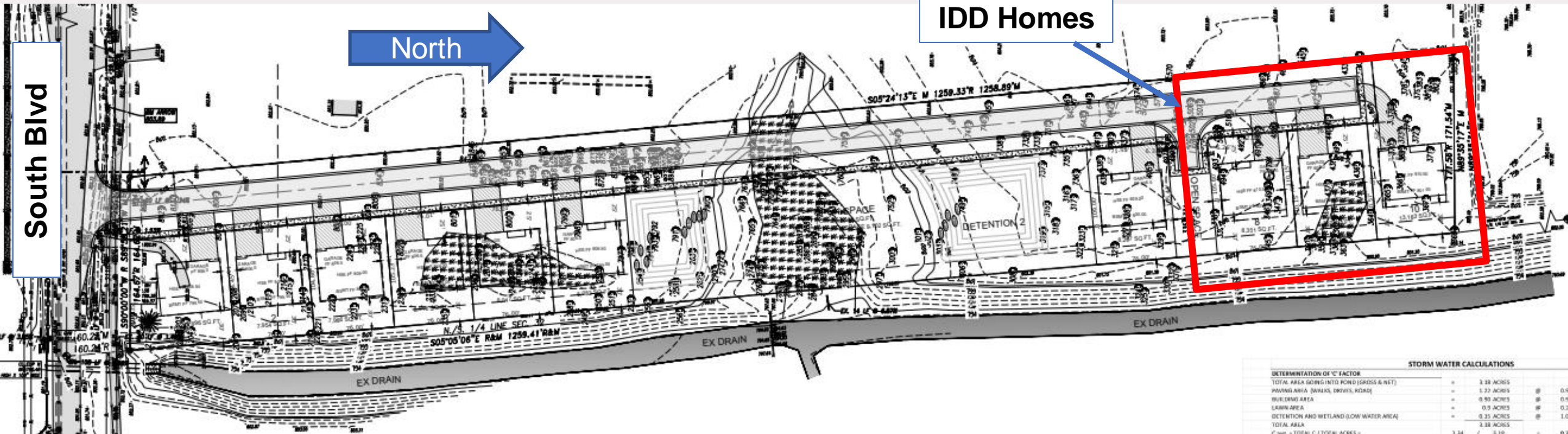


IDD Homes



South Oaks Site Plan (draft)

7 Market Rate Home
3 IDD Cottages



STORM WATER CALCULATIONS			
DETERMINATION OF C FACTOR			
TOTAL AREA GOING INTO POND (GRDS & NET)	=	3.38 ACRES	
PAVING AREA (WALKS, DRIVE, ROAD)	=	1.22 ACRES	@ 0.95
WETLAND AREA	=	0.90 ACRES	@ 0.75
LAWN AREA	=	0.75 ACRES	@ 0.20
DETENTION AND WETLAND (LOW WATER AREA)	=	0.35 ACRES	@ 1.00
TOTAL AREA	=	3.38 ACRES	
C _{adj} = TOTAL C / TOTAL ACRES	=	3.34 / 3.38	= 0.99

Walton / South Cottages Floor Plan

3BR / 3 Bath

1,830 SF

Slab on Grade

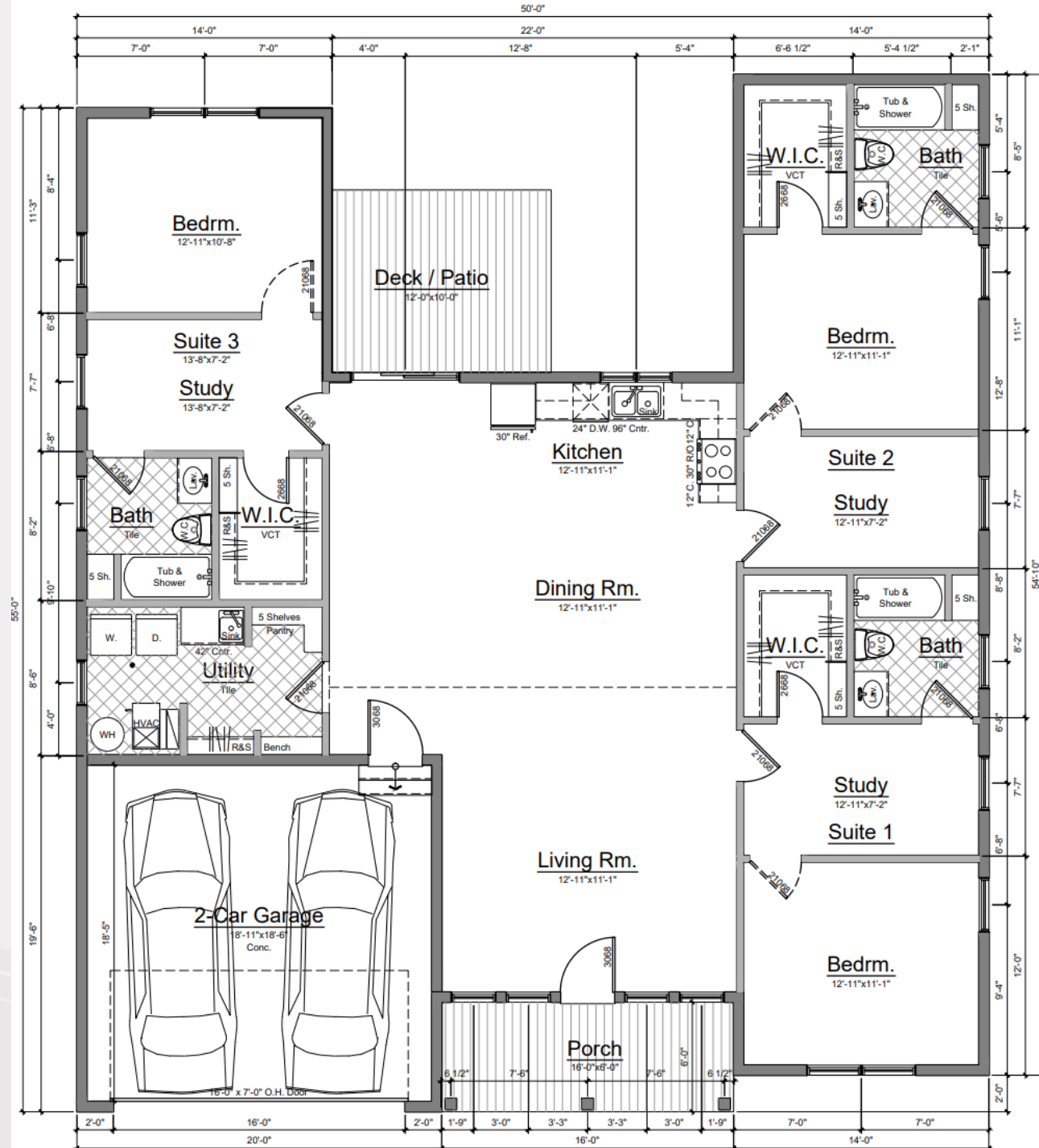


Illustration only.
TOC will
customize to meet
owners' needs

Walton / South Cottages Floor Plan

CB Suite on 2nd Floor



Illustration only.
TOC will
customize to meet
owners' needs

Walton / South Cottages Floor Plan

Finished Basement w/Guest Suite



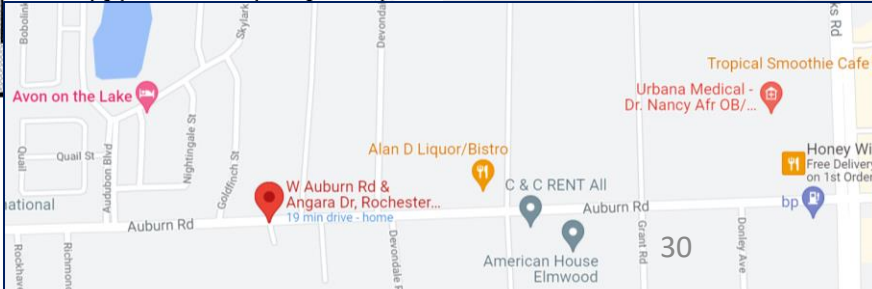
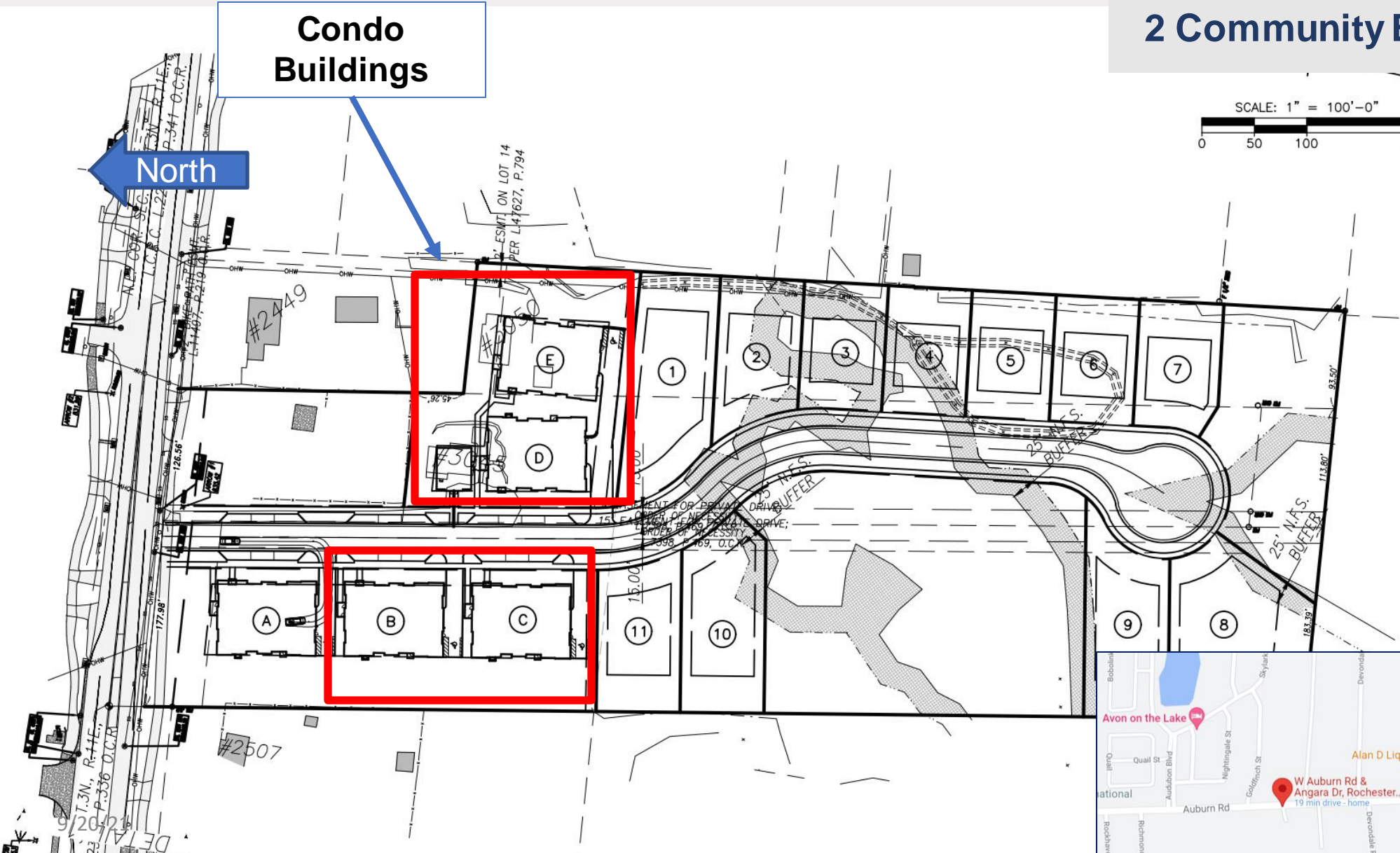
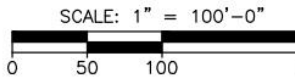
Auburn Oaks Site Plan (draft)

- 11 Market Rate Homes
- 16 Market Rate Condos
- 18 IDD Condos
- 2 Community Builder Condos

Auburn Rd

Condo Buildings

North



Auburn Oaks Elevation



Auburn Condos First Floor Plan

4 or 5 IDD
Condos +
Common Areas
on Floor 1

Elevator w/key
card access

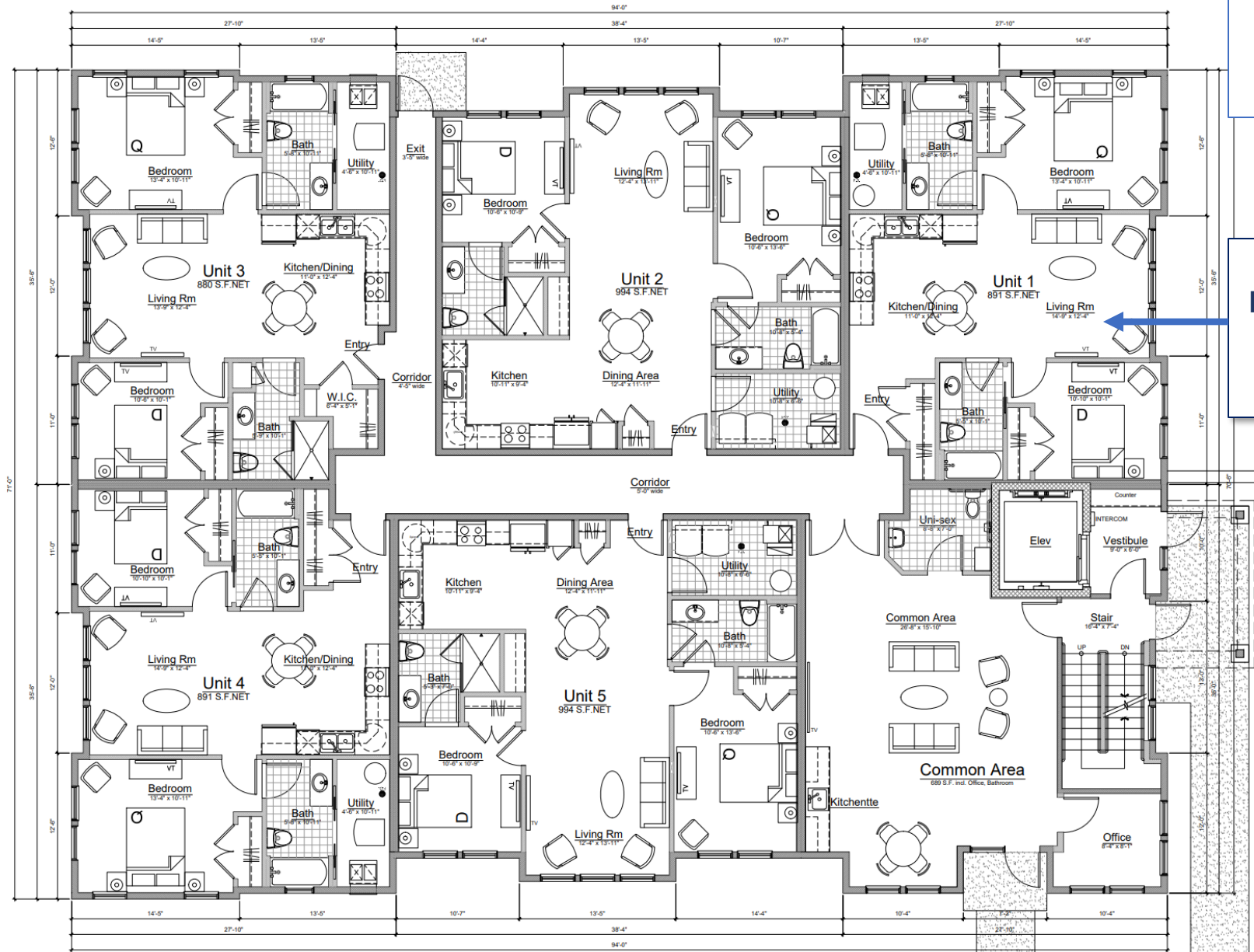


Illustration only.
TOC will
customize to
meet owners'
needs

Community
Builder Suite
in 2 of the
Buildings

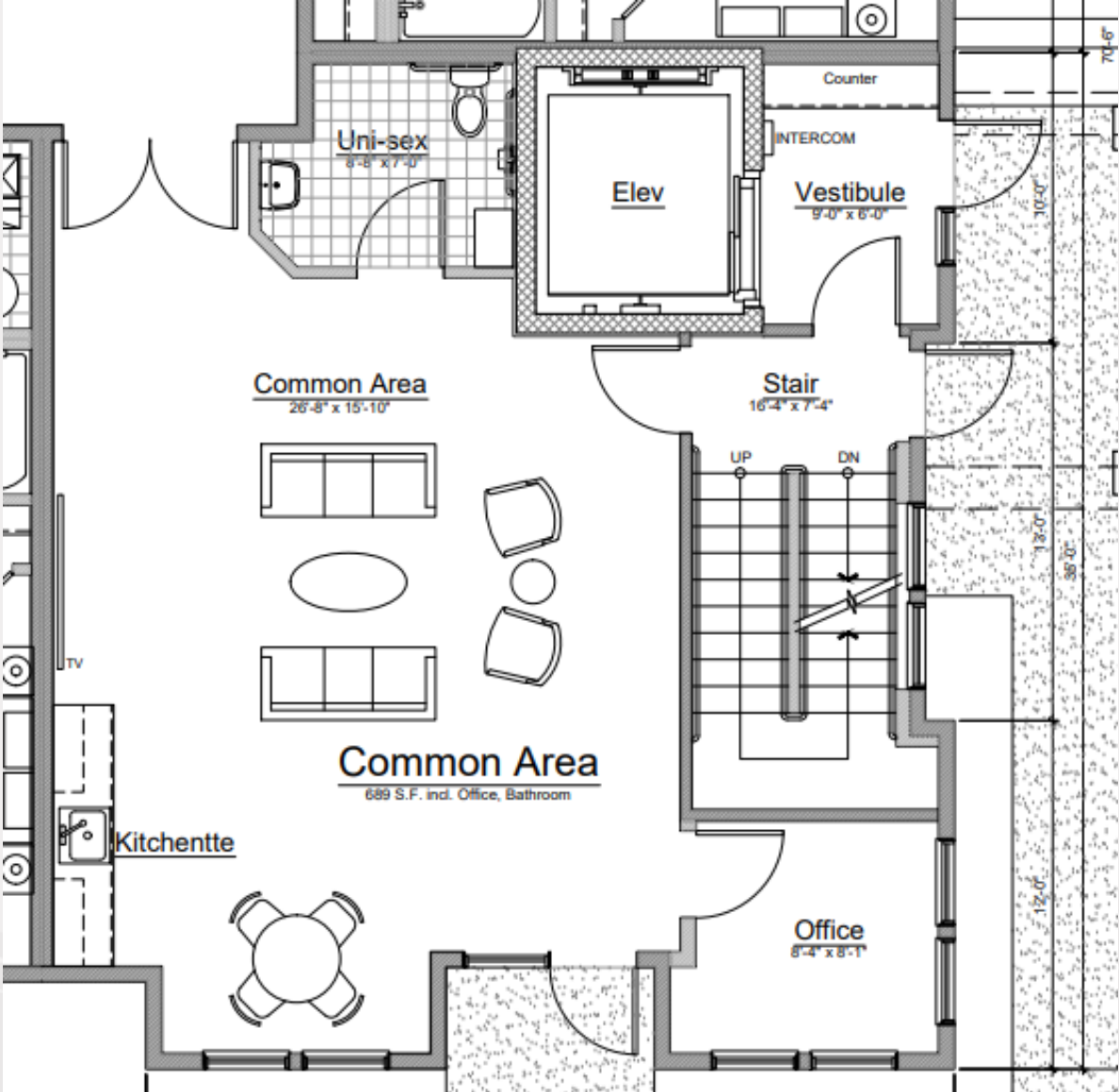
CHARLEVOIX - AUBURN
6,324 S.F.
SCALE 1/4" = 1'-0"

PRELIMINARY NOT FOR CONSTRUCTION

Auburn Condos Interior Common Area

Illustration only.
TOC will
customize to
meet owners'
needs

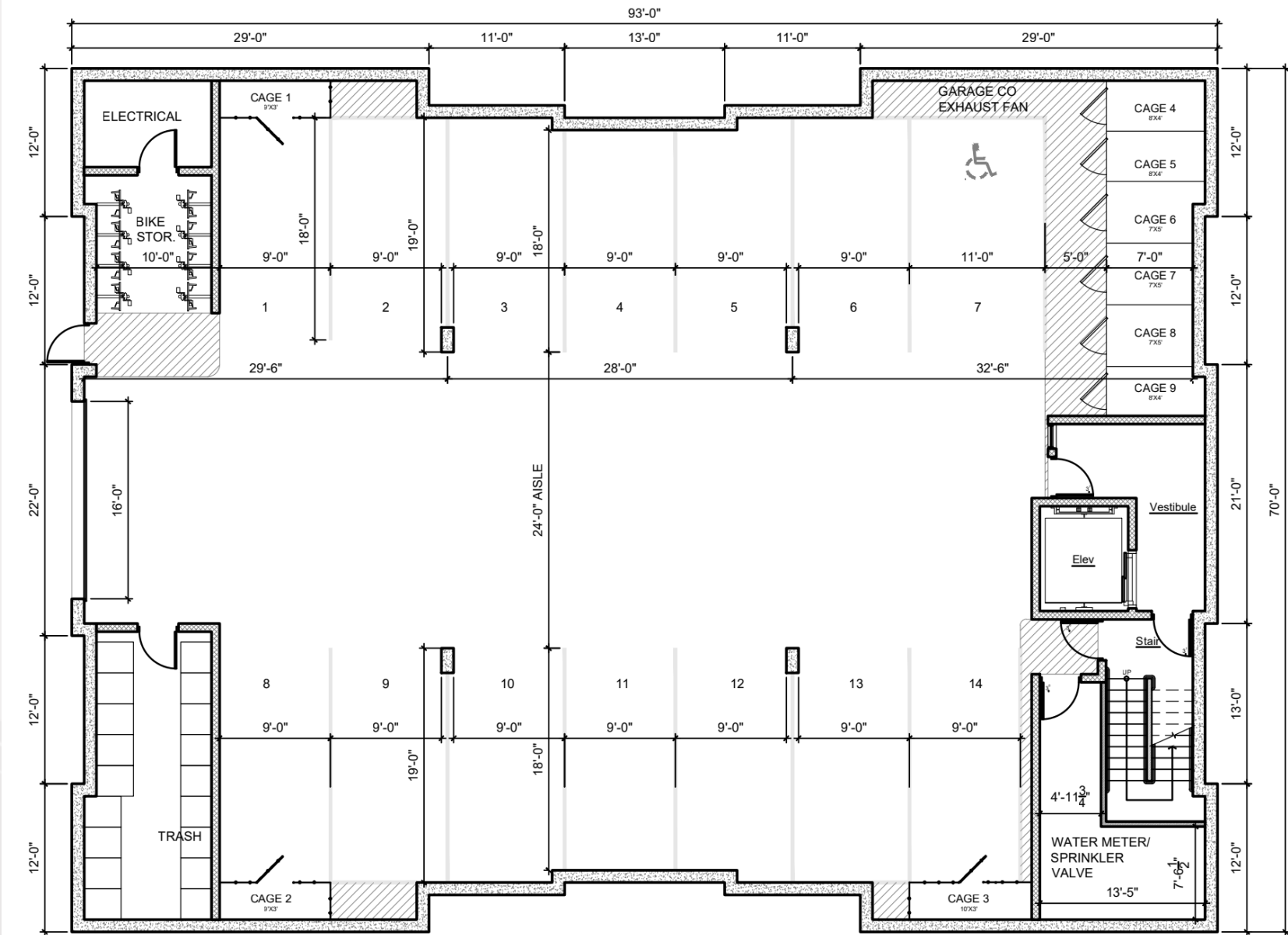
~1,000 sq ft



Auburn Oaks Condos Lower-Level Plan

Illustration only.
TOC will
customize to meet
owners' needs

14 Parking
Spots on
Lower Level
plus Storage



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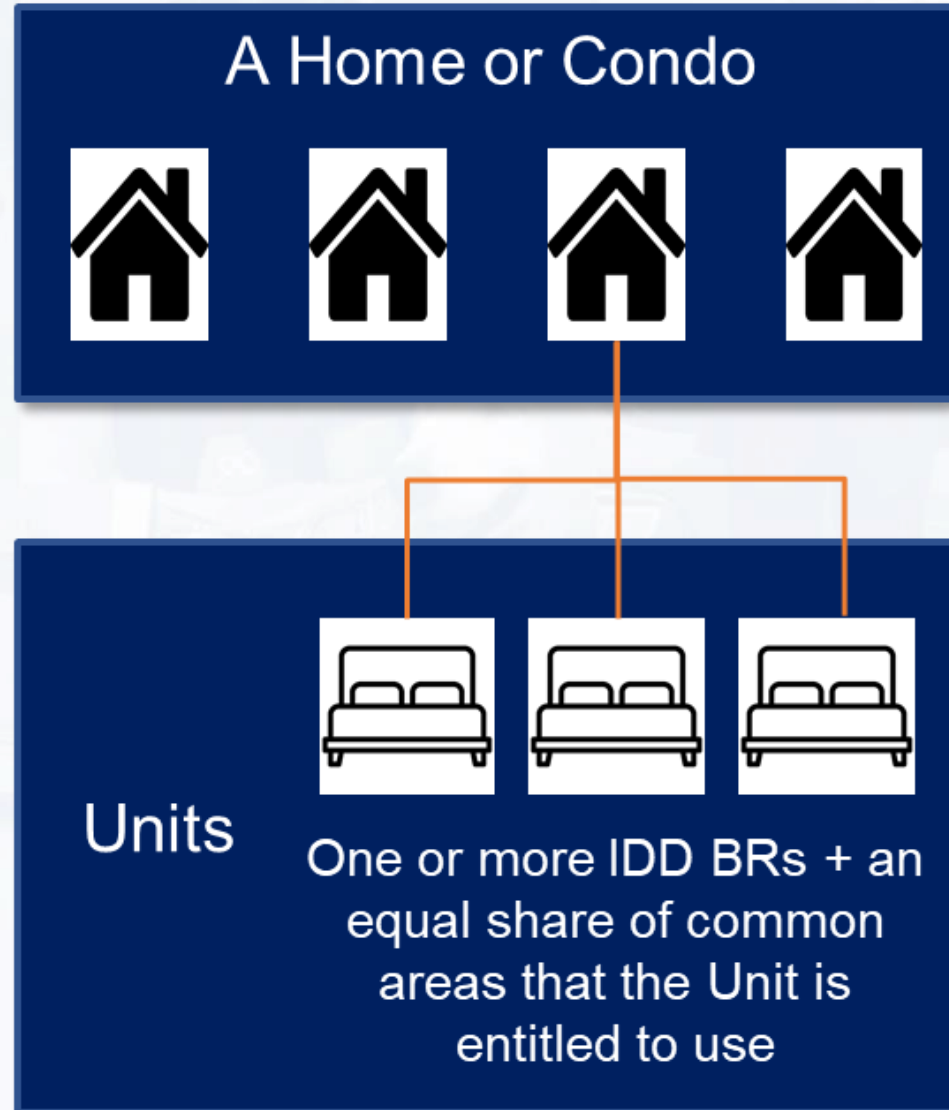


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Homeowners Association (HOA) Model and Costs

Ownership Model

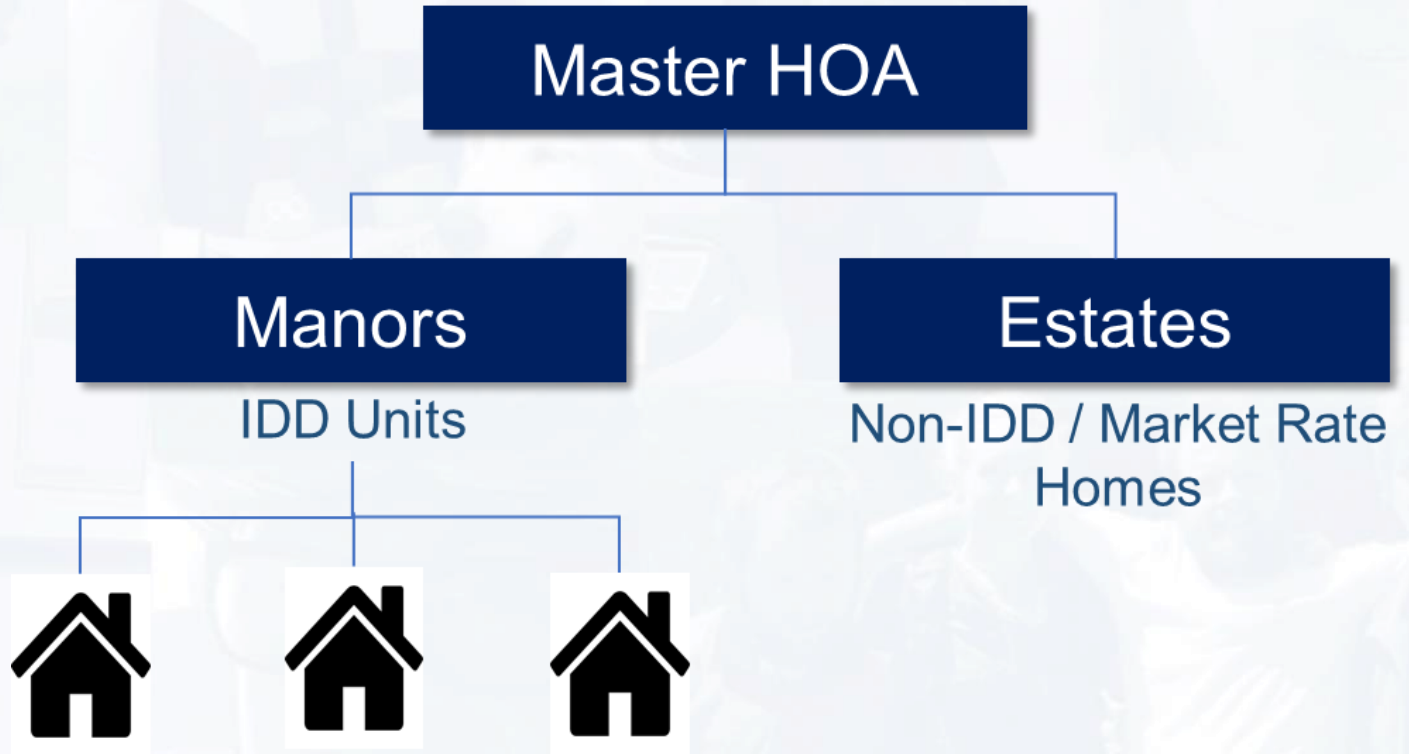
- Units are separately-deeded property
- Can be sold or rented, subject to HOA Approval



Governance / Homeowner's Association (HOA)

(draft)

- Manors HOA (IDD) will set policies and budget specific to the IDD Units, at their sole discretion
- Manors HOA will have representation on the Master HOA. The Master HOA will be responsible for policies and costs that apply to the entire neighborhood



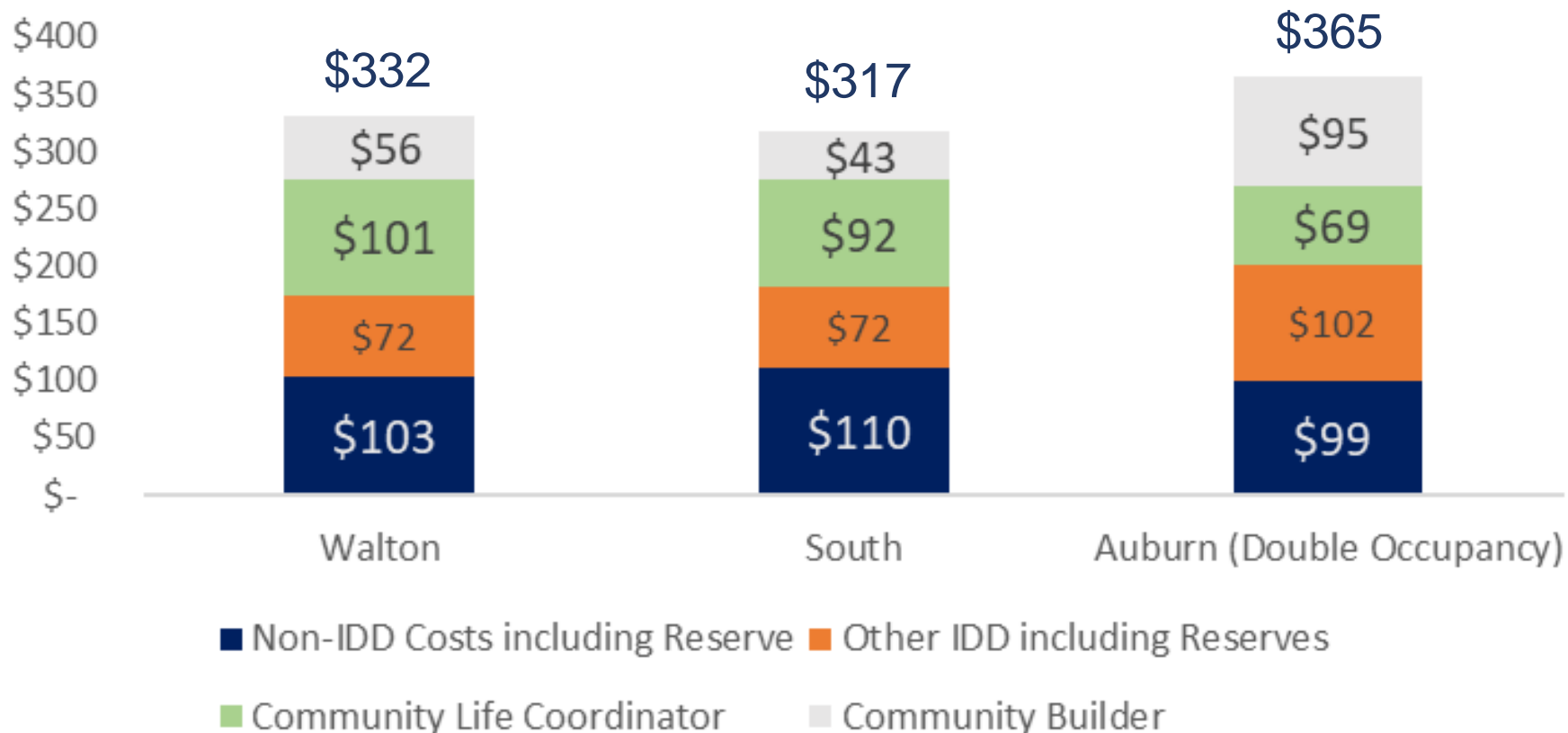
HOA IDD-Specific Policies (draft)

In addition to typical responsibilities for landscaping, snow removal, insurance, bookkeeping, legal, and maintenance of common areas:

- Approve IDD Budget (i.e., CB / CLC)
- Approve new owners and renters
- HOA will have 60-day Right-to-Purchase of any IDD unit that comes up for sale
- Approval of lease agreements for all renters, other than amount of rent which will be negotiated between the Renter and the Owner
- Act as Landlord for Community Builder Suites
- IDD-specific house rules common to all IDD units, if any

Estimated HOA Fees

Estimated HOA Fees Per Month Per Resident



Average CB/CLC costs per month per resident across all 3 neighborhoods:

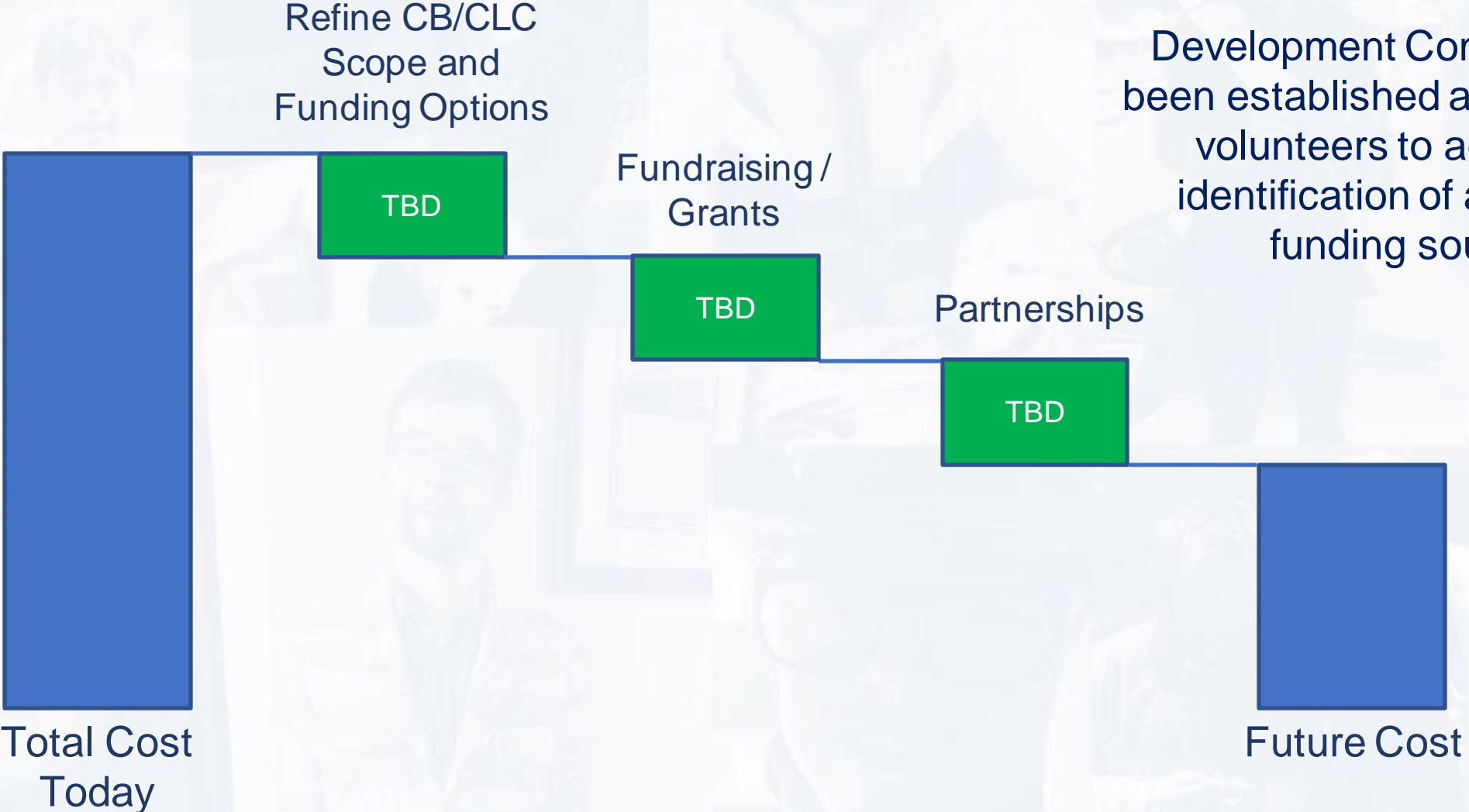
\$152

per month before reserves and including CB rental income

\$234

including other IDD costs and reserves

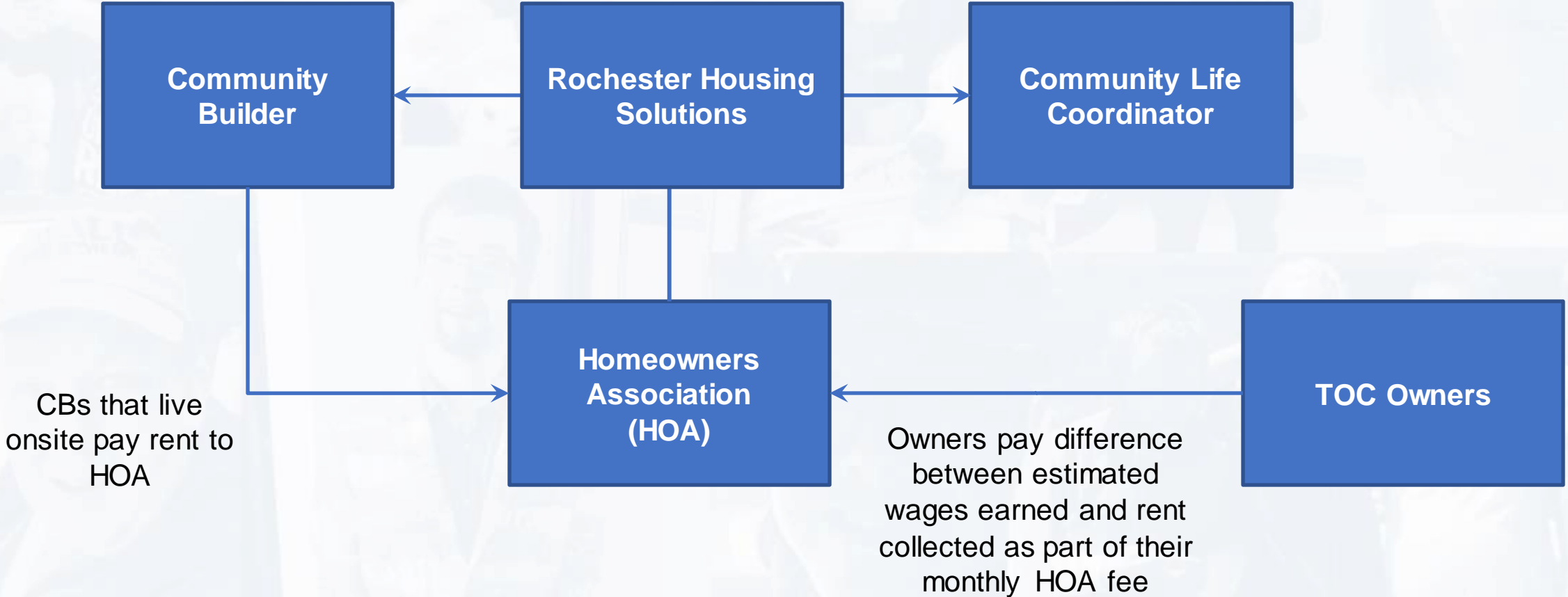
Opportunities to Reduce Cost



Development Committee has been established and welcomes volunteers to accelerate identification of alternative funding sources

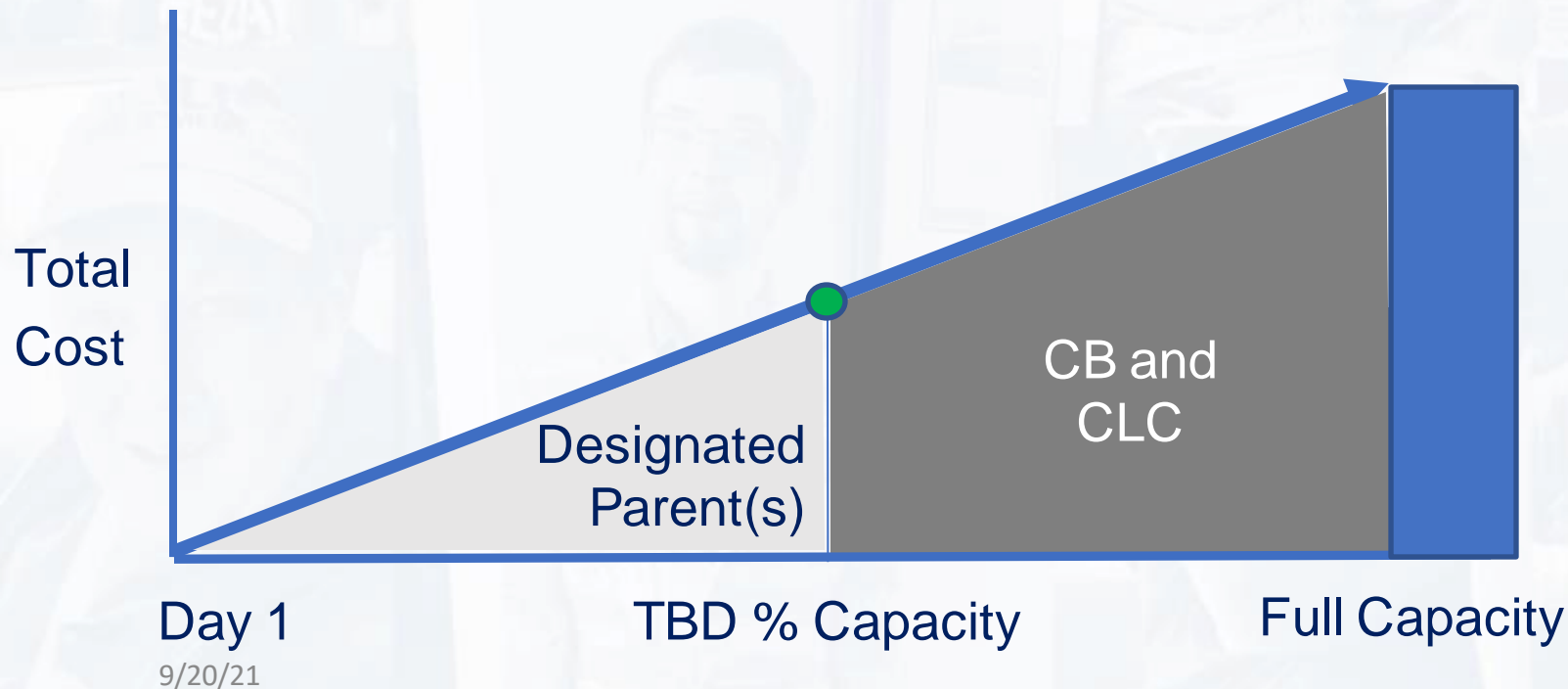
How CB and CLC will be paid

HOA pays RHS, or an agency if outsourced, based on hours worked



Tentative CB and CLC Launch Plan

- Service hours will be added over time as each neighborhood's census grows.
- The speed at which CB/CLC enhanced supports will ramp will depend on the needs of each neighborhood, how quickly residents move in, and how much effort parents want to take on themselves.
- TOC is committing \$1,000 per IDD Suite to help fund services at launch (~4 months of estimated CB/CLC costs, issued as a credit at closing)



- Designated parent(s) provide CB and CLC services until a TBD % of residents have moved in at each neighborhood
- Designated parent(s) are paid CB and CLC fees on a per resident basis until the CB and CLC are hired. Designated parent(s) have the option to:
 - Get paid in cash
 - Receive a credit against future HOA fees
 - Donate their fee to RHS

Three Oaks Communities

HOA Budget Estimates Per Resident

As of 3/12/2022

	Walton		South		Auburn		
					1 Occupant	2 Occupants	
# of Units							
- Market Rate	9	7	27	27	Auburn: 11 market rate homes; 18 market rate condos (incl 2 CB Units)		
- IDD Units	3	3	18	18			
- Total # of IDD Residents	11	9	18	27	If units have more or less residents, allocations will change		
Non-IDD Expenses (Per Resident \$	93	\$ 99	\$ 179	\$ 89	Lawncare, snowplowing, roads, stormwater, insurance		
IDD Expenses (Per Resident)							
- Community Builder	\$ 193	\$ 193	\$ 193	\$ 193	Assumes 9:1 IDD resident to CB ratio. 20 hours / week @ \$20 per hour		
- Community Life Coordinator	101	92	138	69	Allocated by IDD Suite		
- CB Rental Net Income	(115)	(128)	(128)	(64)			
- Other	35	37	111	65	CB event expense, gardens, accounting, etc		
Total IDD Cost Per Resident	\$ 214	\$ 194	\$ 314	\$ 263			
Reserve (10%)					Required by mortgage companies		
- Non-IDD	\$ 10	\$ 11	\$ 20	\$ 10			
- IDD	37	36	49	36			
Total Reserves	\$ 47	\$ 47	\$ 69	\$ 46			
CB Revenue	\$ (22)	\$ (22)	\$ (33)	\$ (33)	\$20 per all homes in the neighborhood allocated by IDD resident		
Total Expense Per Resident	\$ 332	\$ 317	\$ 528	\$ 365			

NOTE:

- Actual # of IDD residents and units per neighborhood will change allocations
- Non-IDD expenses have not been formally quoted. Estimates can change once quotes are obtained.

MiABLE Account and Special Needs Trusts

You are encouraged to pursue professional advice of your own



Click on image to link to these resources

Alert: Important Coronavirus [Update](#) Login

MI ABLE

PROGRAM BENEFITS INVESTMENT OPTIONS CONTACT US

Keep your needs-based benefits.



Take 15 minutes for your future.

Open a MiABLE account now.

[Get Started](#)

A MiABLE account is in addition to – not a replacement for – other government programs. For example, Medicaid eligibility is never affected. However, ABLE account balances that exceed \$100,000 could cause a reduction or suspension of Supplemental Security Income benefits (which is still much higher than the \$2,000 limit for other assets).

Should I Use a Special Needs Trust or an ABLE Account?

[Special needs trusts](#) and [ABLE accounts](#) can be helpful tools to use to save money.

They do not affect a person's [public benefits](#) when used correctly. You may want to use both tools, one of them, or neither. It depends on your family's situation. Below, we have listed some questions to help you decide what tools may work for your family.

While you can make these decisions on your own, we highly recommend that you talk with a special needs attorney or financial planner about how to use these tools to best support you or your family member with intellectual and developmental disabilities (IDD). You can find a list of financial professionals in our [Resource Directory](#).

WHAT DO YOU WANT TO PAY FOR?

While special needs trusts and ABLE accounts can pay for some of the same things, there are important differences.

“ABLE accounts can be used to pay for “qualified disability expenses” (QDE), which includes anything that helps a person with a disability improve their health, independence, or quality of life. QDEs can include basic costs of living, as well as costs for education, food, employment, transportation, technology, support services, and more.”

“Special needs trusts are supposed to pay for “extra” things that make life more comfortable like vacations, pets, entertainment, home furnishings, assistive technology and therapies not covered by Medicaid, and more. These are things that public benefits cannot pay for. If money in a special needs trust is used to pay for basic costs of living, a person’s public benefits might be decreased.”



Solutions for Adult
Interdependent Living

We're building a family community of differently-abled people with hopes and dreams for the future

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