



A Call for Property Management Transformation To Meet the Challenges of Mixed-Income Communities¹

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As long-time affordable housing developers and community builders, we believe in the ideal of mixed-income communities. We have experienced genuine success in our work within communities, as well as authentic moments of personal growth and fun in our personal lives by living side by side with diverse neighbors. We have observed people from very different backgrounds getting to know each other in new ways by exchanging small favors of value, and we have watched a site staff team hold small-group “design sessions” with diverse residents to solve a shared problem. The truth is, however, that these moments have been hard won and few and far between. This may be no wonder, given the huge human and financial resources committed to bricks-and-mortar development compared with the limited ingenuity and investment devoted to sorting out the complex human aspects of daily operations and community building in contexts where residents come from very different cultural and class backgrounds. There is no doubt that this is the hardest part of this work to figure out—but we must.

We assert that the principle difference between communities and neighborhoods that work and those that languish is that the former have a network—a group of people who make the choice to embrace differences and to cultivate and act on their interconnectedness. This group works to develop the personal capacity to form mutually beneficial relationships, in order to tackle tough challenges, plan for an uncertain future, and cultivate quality of life.

This is particularly true in the context of public housing transformation work, where deeply subsidized housing communities are being replaced with mixed-income communities. The truth is that the public housing residents, the market-rate residents, the residents benefitting from other housing subsidies, the owner-manager agents, the service providers, and the surrounding neighbors are all in the same boat when it comes to the relative success of their community. If there is a new network of mutual respect, reciprocity, and shared decision-making, it will need to come from members of all of these groups; each will need to change how it operates relative to its boat-mates.

¹ This essay appears in Mark L. Joseph and Amy T. Khare, eds., *What Works to Promote Inclusive, Equitable Mixed-Income Communities*, please visit the [volume website](#) for access to more essays.

Efforts to forge networks among diverse members of a “transformed” community face these core challenges:

- Will long-time, publicly assisted residents who now live in a transformed community—but one where most biases against them still remain—trust a new invitation to reach out and connect across lines of difference?
- Will new residents of a different economic class, who may feel they are taking a risk to move into a mixed-income neighborhood, suspend judgment and fear long enough to lean into genuine “neighboring” relationships of mutual benefit?
- Will the owner-manager agents, property managers, asset managers, and maintenance staff step out of their compliance-centric professional roles and adopt human-centered practices and protocols that support genuine relationships across race, age, and income for collective place making?
- Will supportive service staff stop “helping” long enough to listen, and will they learn to trust that most, if not all, residents have the capacity and wherewithal to not only help themselves but help others and contribute to community life?

These are the shifts, we believe, that start to change an operating culture rooted in fear and isolation into one rooted in aspiration, connection, and reciprocity.

During the past decade, we have had the good fortune to work with several owner/manager groups who understand this challenge and share our quest to spark new, better ways for relating to one another, as workers and as residents of affordable housing communities (whether mixed-income or 100 percent subsidized). One of those, [TREK Development Group](#) in Pittsburgh, took the bold and unusual step of asking each staff member to sign a covenant, pledging three core behaviors related to positive human interdependence. TREK now is in the process of asking residents who live in the planned communities to make the same commitment. This strategy, combined with other key steps, has positioned TREK as a trailblazer in developing of a new approach for operating affordable and mixed-income housing communities. This paper examines TREK’s initial journey in detail, in hopes of encouraging others to join or to share similar experiments, so we can learn from you.

TREK Development Group’s Journey: An Action Learning Model

Five years ago, the authors of this essay were approached by Bethany Friel, a senior staff member of TREK Development Group in Pittsburgh, PA, to support their efforts to improve the quality of life for residents and staff in their real estate portfolio of 70 communities and their growing property management portfolio of nearly 500 units. As a regional developer, Trek’s portfolio includes market-rate, mixed-income, and mixed-use developments in gentrifying urban settings; 100 percent deeply subsidized complexes in both rural and suburban neighborhoods; and public housing transformation initiatives in urban neighborhoods of entrenched poverty. The

company, which began in 1991, is owned and led by its founder, Bill Gatti. TREK enjoys a reputation for thoughtful, creative design, especially in re-purposing older, pre-existing structures within the financial and regulatory constraints of affordable housing development. The vast majority of units are located in the greater Pittsburgh area and serve a very diverse resident population, with incomes at every income level.² Of TREK's 47 employees, 32 are dedicated to property management and two to resident services.

Our team included [Trusted Space Partners](#) (Frankie Blackburn, Bill Traynor, and Yerodin Avent) and the [National Initiative of Mixed-Income Communities](#) (Mark Joseph and Taryn Gress). Over the course of three years, we provided on-site technical assistance, facilitation support for several staff gatherings, and coaching by phone to individuals and small teams.

TREK Development Group is the first to acknowledge that their learning journey is not complete, but we believe the positive indicators are significant enough to be informative. But we see five major signs of change within that we view as critical to the creation, operation, and sustainability of thriving, mixed-income communities—signs that we hope can serve as guideposts for other like-minded companies and nonprofits. First, TREK's property management division is now viewed within the company as being as important as the real estate development side, if not more so. As CEO Bill Gatti states, "Even though it generates considerably less top line revenue, the opportunity cost and human cost of doing [property management] poorly are very high." Second, everyone in the company is clear about the common goal of creating connected and aspirational places, and they have a specific blueprint for which daily behaviors are needed to achieve this goal. Third, senior staff try to model their expectations for how communities should operate by actively working to implement the vision of a connected and aspirational environment inside the company. Fourth, TREK has a growing toolkit of intentional spaces and practices that site staff use to connect with residents and neighbors, along with inspiring and informative stories of success from four pilot sites. Fifth, specific changes have been made in the type of person recruited to serve as a site manager and in methods for supporting and holding these staff accountable.

It is important to note that these changes did not happen overnight, but rather over a four-year period, with many steps forward and backward. The remainder of this essay identifies nine key decisions made by TREK Development Group and four innovations in internal operating characteristics that contributed to TREK's ability to successfully manage mixed-income housing.

Nine Key Decisions

²Trek Development Group, accessed January 23, 2020. <http://trekdevelopment.com/>

1. Bring Property Management In-House. When our team first met with TREK Development Group, company leaders were in their early years of building an internal property management division. Bill Gatti and his senior partner, John Ginocchi, explained that this decision arose out of a desire for greater control over the quality of housing they had worked so hard to produce and because of the extra challenges they faced in redeveloping older, deeply subsidized housing. Both partners believed that a direct relationship with site managers and their teams is essential to effectively support and hold them accountable for TREK's broad range of desired outcomes. We concur completely and cannot imagine an owner being able to spark a positive shift in the underlying operating culture of a housing complex without greater control of the human capital needed to do this work.

2. Approach Growth and Expansion Thoughtfully. TREK's goal was to manage 1,000 units, understanding that growth is necessary in order to sustain the work. However, TREK also believes in growing only as fast as the commitment to high-quality work and outcomes can be met. This operating principle is different from that of many other affordable housing organizations, which try to grow too quickly. The negative impact of growing too fast over a large geographic area is felt most keenly in the property management side of the affordable housing business, as site manager positions turn over fairly frequently and new people are trained and supervised largely by people who are rarely physically present.

3. Avoid the Resident Services Trap. Many resident service divisions of affordable housing companies end up feeling siloed, at odds with other divisions of their company, and unempowered to demand and co-design a more productive way of creating thriving places to live and work. The landscape of resident services interventions deployed in the field also tends to be confusing, uninspired, and—despite rhetoric to the contrary—still largely deficit-based, with the default being some version of a “case management” approach. To their credit, TREK's leaders were looking for an alternative from the get-go. They purposefully went looking for the new talent needed to create a more holistic orientation toward residents and staff, and found Bethany Friel. Bethany has a master's degree and significant work experience in social work, but just as importantly she has a creative, entrepreneurial spirit with vision and imagination; humility to recognize her own need to listen, learn, and seek advice and wisdom from others; and the ability to be persistent while meeting others where they are in the moment. TREK's leaders gave Friel the resources, freedom, and partnership she needed to design, test, and integrate an approach that fit with the vision of connected communities.

4. Slow Down to Listen and Build Accurate Assessments. Bethany spent much of her first six months at TREK talking and listening to site staff (resident services coordinators and property managers) and participating in many internal meetings to plan new communities. She observed TREK's leaders out in the community as they addressed concerns about future development plans, and she filled in where needed to address resident challenges at existing

sites. Bethany emerged from this time with several observations about the gap between TREK's thoughtful approach and the day-to-day operations of existing communities:

- Property site managers controlled all of the decision-making power at their sites and routinely dismissed or ignored the value offered by resident service coordinators, even though these staff were often more educated and experienced in working with people.
- Site managers felt isolated from others in the company and often reinvented the wheel, acting from a place of self-protection rather than with a spirit of collaboration and shared mission.
- In general, property management staff approached "people problems," such as conflict between neighbors or a child's unruly behavior, as if there were a cookie-cutter solution. They didn't apply as much careful assessment to these problems that they applied to a broken furnace or other operational challenges.
- In some but not all cases, the site manager's underlying assumption was that residents of affordable housing should be grateful for good-quality housing.
- Negative energy was present everywhere and all the time; people on all sides of the table were not happy.

Based on these observations, Bethany gave herself this mandate for moving forward: (1) Infuse the commitment to innovation and entrepreneurial spirit from TREK's development side into the management side; (2) build connections between and among site managers and service providers; (3) make meaningful, cost-effective investments in this work; and (4) infuse joy and hope into the picture at all times. In this way, Bethany's decision to slow down from the hectic pace of housing management, listen, and learn led to a more impactful strategy than if she had proceeded with pre-existing assumptions.

5. Require Senior-Level Commitment. During the early months, Bethany was able to engage, inspire, support, and hold accountable TREK's principals, Bill Gatti and John Ginocchi, in staying true to the path of change they sought by bringing her in—even when the pressures of an on-going real estate development and management operation were overwhelming. Likewise, Bill and John took time to teach Bethany about their core business, allowing her to ask many time-consuming questions and including her in conversations beyond her immediate scope. We cannot over-emphasize the importance of having an internal catalytic team with a very strong sense of mutual respect and cross-sector learning to initiate, sustain, and spread the shifts in operating culture that are needed to create thriving, mixed-income communities.

6. Stay Focused on Internal Systems Change, and Have Courage to Seek Help When Needed. Soon after joining TREK's staff, Bethany Friel read a paper about how the Triple Aim team, a partnership between Trusted Space Partners (TSP) and the National Initiative on Mixed-Income Communities (NIMC), had shifted the operating culture of a 900-unit affordable housing complex in Washington, DC. At her urging, TREK's senior partners decided to invest in bringing the Triple Aim team to Pittsburgh to meet, exchange best practices, and assess several

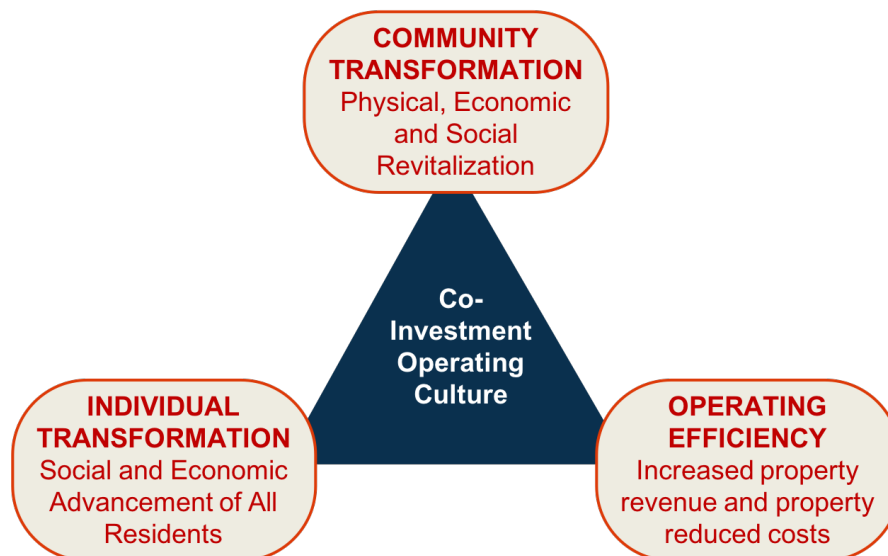
of their current community challenges. Over the course of a year, including several site visits and regular phone check-ins, our Triple Aim team shared with TREK our framework, tools, and lessons about how to shift the operating culture and create new networks of shared connection and aspiration. (See a summary of Triple Aim on the next page.) The TREK team helped the Triple Aim team understand the context within which they were working, and together we selected two pilot sites to focus on for joint action learning.

SUMMARY OF THE TRIPLE AIM APPROACH

Triple Aim is a framework jointly developed by Trusted Space Partners and the National Initiative on Mixed Income Communities in 2013 to help spark a deeper and more integrated approach to the daily operation of affordable housing, with a particular focus on the diversity and inclusion challenges of mixed-income complexes.

Core Belief: We are all human beings—residents, staff, neighbors, and partners—and we are all interdependent on each other for a high-quality life.

Underlying Philosophy: We believe that a systems approach to mixed-income communities is essential. Two fundamental shifts are needed: (1) **a goal shift** from separately defined goals for asset management, property management, and resident services to a unified “triple aim” that emphasizes the shared interests of all involved; and (2) **an operating shift** from narrowly focusing on maintaining compliance, collecting rent, and crisis management to creating an aspirational culture of human connection and co-investment among owners, staff, and residents. The diagram below illustrates how these two shifts lead to individual and community transformation in addition to increased operating efficiency.



Underlying Strategy: We promote three interwoven strategies: creation of intentional spaces, use of intentional practices, and formation of a new network (not an organization). Each strategy is designed to spark and support mindset shifts, mutual exchanges, and collaborative action.

- An **intentional space** is any gathering, small or large, that is carefully designed to support greater human connection and exchange among the people involved (e.g., “a monthly gathering of residents and staff that disrupts normal power divisions and supports new relationships and collaborative problem solving). A property manager can also convert a rent recertification moment into an intentional “space” that achieves the compliance goal *and* invites the resident to become a part of an on-going network of residents and staff, perhaps envisioning a specific contribution he/she/they might be able to make.
- **Intentional practices** are the devices, questions, and tactics used to make new connections in intentional spaces.
Networks offer a more flexible form for on-going connection than the traditional model of a tenant organization or neighborhood association.

7. Deploy Two Powerful Tools: CEO Participation and Network Night. We all needed to be present in the very beginning to co-execute strategies together. During the early phase of our Triple Aim partnership with TREK Development Group, it was critical that the two senior partners—often distracted with the intensity of their leadership positions but with persistent nudging by Bethany Friel—remained at the “action learning table” and committed to modeling new behaviors. It also was essential that TREK leaders got comfortable with having the Triple Aim team present as close-in partners, so that Triple Aim served not as a new “program” to be handed off but as a system intervention that required high-quality execution.

Network Night is a monthly gathering of property management staff and residents based on principles of inclusivity, freedom of choice, and fairness combined with several other new relationship building practices. The interactions can quickly reverse toxicity between staff and residents and help to surface residents who have ideas and interest in working with staff to make improvements. Consistent practice of Network Nights in TREK’s sites has led to the formation of a rotating Network Action Team of residents and staff who meet bi-weekly to conduct leadership development, mutual support, and action planning to strengthen the new neighborhood network. During a two-year period, the Trusted Space Partners team visited TREK’s sites twice, participated in community gatherings, accompanied a Network Action Team in a peer visit to a community-building team in Cleveland, held regular strategy sessions with Bethany Friel and other TREK site staff, and provided resources and tips for managing expansion of the network.

NETWORK BUILDING HAS PERSONAL AND COMMUNITY IMPACT

Theresa, a resident in one TREK site, ignored several notices inviting her to Network Night—until three smiling TREK staff members showed up at her door with packets of hot chocolate and popcorn to issue a personal invitation. The next week, she attended the gathering and was pleasantly surprised by how comfortable and meaningful it felt. When asked by a staff member to help set up for the next monthly gathering, she gladly said yes. Theresa began joining a small circle of staff and residents who met to plan each of the larger monthly gatherings. She now says these early steps of involvement, made with warm encouragement from her new staff and resident friends, helped her resolve a bad situation in her life, begin a new search for a job, and experience a new beginning after years of suffering from depression.

At an 82-unit complex just outside of Pittsburgh, Network Action Team members addressed concerns about residents not cleaning up after their dogs, trash and cigarettes not being put in approved containers, and bikes being left strewn around the property. The team of staff and residents had difficult but meaningful conversations about these concerns, which touched on issues of parenting, safety, sanitation, and aesthetics. They decided to implement a Beautiful Buildings Contest as a way to reach out to neighbors and start conversations related to safety and neighborhood pride. The contest was a tremendous success and led to a much larger group of residents feeling connected with the growing network and a greater sense of self-agency and shared ownership of the community.

8. Take Risks to Leverage Moments of Opportunity. After a year of learning and experimenting with Triple Aim, TREK Development Group applied to the local housing authority to become the planning coordinator and lead developer for a [Choice Neighborhoods](#) planning grant in Pittsburgh, using Triple Aim as its core approach. The Triple Aim team and TREK together designed a series of retreats and team-building steps to ensure that the housing authority was on board, at the leadership level and onsite. Triple Aim team members visited Pittsburgh and the Choice neighborhood frequently to roll out and demonstrate a system of new intentional spaces and practices with residents and partners who initially were very skeptical. It soon became clear that additional staff support was needed, so TREK and Triple Aim created a new “Community Network Builder” position, which they filled with Montia Robinson-Dinkins, a person skilled at creating spaces to build relationships and who also brought deep experience in the community where redevelopment was taking place.

Over the two-year planning process that followed, this “intervention team” designed and wove together the following intentional spaces and practices on a consistent basis:

- Creation of a compelling invitation to residents and staff;
- Proactive door knocking and street outreach, with a fun and creative flare;
- Weekly drop-in spaces for questions and ideas to bubble up and relationships to form;
- Monthly Network Nights for relationship building, table talks about issues and ideas, and neighbor-to-neighbor exchanges;
- Naming and claiming of a new neighborhood network, with colorful branding and t-shirts;

PLANNING FOR A NEW OPPORTUNITY MOBILIZES AND EMPOWERS RESIDENTS

Evidence of a shift in operating culture emerged as residents of the Bedford Dwellings complex, a TREK site, began to help facilitate the planning process for a potential Choice Neighborhood project. Residents brainstormed events and programs that they wanted and were willing to lead, leading to adoption of nine new resident-led initiatives, including a Sisters Circle, a Summer Fest, a clean hallway contest, a senior appreciation luncheon, an on-going “coffee shop hour,” and the decision to take the coffee hour on the road to different parts of the large complex.

Perhaps the best evidence of new self-agency and aspirational behavior was when a core group of “resident stewards” politely asked the non-residents present in one of the many Choice Planning sessions to leave the room so they could reach consensus on a critical phasing question posed by the project managers. In another example, a resident who had attended meetings but never spoken took time to prepare and present to the full group on a range of relevant topics. And five community partners successfully used the Network Night framework to connect with Bedford residents, leading to more authentic exchanges and relationships.

When asked about his most transformative moment in pursuing the Triple Aim strategy, TREK CEO Bill Gatti says it was watching the resident steward team slowly take ownership of the Bedford Connect Network Nights: “Their excitement was palpable and inspiring. In many cases, their ability to deal with disappointment and feel empathy for others exceeds my own. *They* felt bad for *me* when we failed to win the Choice Neighborhood implementation grant.”

- Follow-up relationship building with people who seemed excited by the new spaces and new ways of relating to each other;
- Formation of a core steward team to help with all of the strategies and to form ad hoc design teams to go deeper on specific issues as they arose; and
- Financial support for resident-led events and ideas as they surfaced.

Before these very intentional strategies were consistently and collaboratively used, the housing authority had only met monthly with the resident council, typically attended by only three or four residents. Since formation of the new partnership and adoption of the Triple Aim approach, 16 monthly “Bedford Connects” network nights have been held, with an average attendance of 25 to 35 residents. More than 200 residents, most of whom had never been to a resident gathering before, have attended at least one Bedford Connect night.

9. Walk the Talk Internally with Staff Synergy Sessions. As the Choice Planning team took a deep dive into implementing the Triple Aim approach in one neighborhood, TREK’s senior staff team focused on how to more intentionally create an aspirational and connected environment among all TREK divisions and within staff teams. The most dramatic shift was represented by a decision to host regular all-staff Synergy Sessions, fashioned out of the same principles as the neighborhood Network Night gatherings: inclusion, freedom of choice, focus on gifts/assets, and small-group conversations on topics chosen by participants. These sessions led to new and better lines of communication and human exchange between senior staff and front-line management staff. A complete team of senior staff members—not just the director of property management—now had a collective and more accurate assessment of on-site challenges and successes. And on-site staff members witnessed the key leaders caring about and modelling the practices they were being asked to adopt.

Senior staff followed the Synergy Sessions with a series of on-site listening sessions. These helped site staff understand that the senior staff, especially TREK’s CEO, were very serious about creating a higher-quality environment than the typical affordable housing community offers. Moreover, a few on-site staff emerged who seemed ready and ripe to experiment with the Triple Aim approach, including property managers, maintenance workers, and service coordinators. Bethany Friel sought out these staff and recruited several of them to experiment with Network Night in their sites. The expansion of Network Night, which increased the number of pilot sites from two to four, reached a more diverse range of properties, generated many lessons, inspiring existing sites to stay the course, and increased the number of “choir members” inside the organization who were excited and committed to the new way of operating.

Four Innovations

Operating cultures do not change quickly or easily, especially in affordable housing and mixed-income environments where the property management and resident-services fields hang onto old traditions of service-driven practice and face incessant demands for financial, legal, and regulatory compliance. It's fair to say that these dynamics exacerbate rather than ameliorate years of built-up resentment and mistrust on the part of residents who are constantly being prodded to prove their eligibility, allow inspectors to walk through their homes, and participate in the next social services activity intended to fix their "brokenness."

TREK faced two big mid-course challenges: (1) several key internal leaders, both at the corporate and site level, didn't buy in to the Triple Aim approach but did not openly reveal their lack of support; and (2) the senior leaders and site staff who were committed to Triple Aim struggled to communicate to others the daily manifestation of the vision, especially as it applied to every single staff person, including janitors, accountants, and office assistants. Many staff understood the concept of building connections with residents and supporting resident-led initiatives but did not know how to put the concepts into practice in the middle of a routine maintenance call, while listening to a resident complain about another resident, or when trying to solve a nagging problem such as rodents, loitering, and dirty common spaces. A few site managers and maintenance workers actively resisted the approach, either by ignoring requests for experimentation or implementing a strategy half-heartedly. Even though these moments of active and passive resistance were challenging to TREK's Senior Team, the pain provided the extra kick needed to make some important innovations—reforms worthy of replication throughout the affordable and mixed-income housing industry.

Innovation One: A New Approach to Co-Leading a Housing Development Company. In virtually all of the housing companies with which we have experience, the real estate side of the business receives the greatest share of leadership time, attention, and recognition. This was true of TREK Development Group, too. Bill Gatti and his very close colleague, Senior Vice President John Ginocchi, are the two key leaders and visionaries of TREK, and until recently both were primarily focused on building and advancing their real estate development pipeline in as thoughtful and meaningful way as possible.

When they made the decision in 2015 to bring property management in-house, at least for most of their portfolio, Bill and John assumed they needed a new, third person whose primary experience was in housing management, particularly of affordable housing. A new partner was recruited and hired, and he went to work building the management division. In many respects, Bill and John viewed property management as a necessary ingredient but not one needing their close attention or shared ownership, and the new head of the property management team kept mostly to himself. Bill and John did not realize a big shift in approach was needed until Bethany Friel came on board and encountered serious resistance from site staff to basic calls for improved

quality and attention to the Triple Aim strategy. The following changes, made over time, created the extra organizational emphasis and space needed to continue on the Triple Aim path:

- Bethany Friel was promoted to a newly created position, director of mission, culture, and people, and placed on equal footing with the director of property management.
- A new property management director was carefully recruited and hired. The importance of Triple Aim to the company was a significant component of this new director's recruitment, vetting, and on-boarding.
- John Ginocchi, who has deep experience with housing management issues, was promoted from vice president of development to executive vice president. John now manages the company's operations and supervises both the director of property management and the director of mission, culture and people. This move signaled and embodied TREK's prioritization of high-quality housing management above all else.
- In his new role, John asked Bethany to temporarily assume the role of a regional property manager, so she could better understand the management business and better evaluate gaps in TREK's basic management operations.
- Two long-time site managers with considerable staff influence were replaced, along with a number of site-based maintenance workers. (As the operating culture began to shift, these staff expressed feeling uncomfortable with the changes and opted to leave. No one was fired).
- TREK hired a local human resources company with a commitment to high-quality performance that was in sync with the Triple Aim initiative, to support hiring decisions, performance review practices, and other HR issues.

TREK's senior leaders now emphasize the importance of supporting all staff's personal development. For example, they formed a book club focused on personal agency; the first book, read by 10 staff members including company executives, was *Dare to Lead* by Brené Brown. "I am learning things about staff members that I would have never known otherwise, and I see [the book club] helping us recognize and address behaviors that are roadblocks to good leadership," one of TREK's senior leaders observed.

Innovation Two: Hospitality Covenant with Pledge and Core Practices. In response to the painful moments of passive and active resistance referred to earlier, our Triple Aim team went back to the drawing board to see how we could communicate expectations more clearly and with a greater sense of inspiration and urgency. We were most focused on TREK staff but also knew that residents must be involved in considering new ways of operating and behaving. We sought to create lots of new "two-way streets."

Bill Gatti often refers to his vision for TREK to provide a deeper level of hospitality in all moments, small and large, when developing and operating a housing community. When pressed, he tells of traveling in foreign countries where he and his family have been received with extraordinary hospitality, and how that brings out the best in him and his family while visiting a

new place. Bill is not talking about hospitality as hotels often do but in its ancient form of reciprocal exchange between two strangers.³ Our core team, including Bill, took time away from the office environment to attempt to convert this concept of deep hospitality into three core values and a beginning set of five shared practices. The mandate to have only three values and five practices was hard! But we knew that if the idea of deep hospitality was to take root and grow inside the company and among residents, it had to rise above all other core values and operating principles, and it had to be something that every person could keep in their mind at every moment of the day. (It is important to note that TREK had a set of core values well-articulated and communicated prior to the journey with Triple Aim.) The graphic below shows where we landed with this “Hospitality Covenant.”



WE PLEDGE TO:



Treat everyone with the kindness we all want



Do our own part to take care of the place where we live and work



Take the time to help each other achieve our goals and aspirations.

SIGNED: _____ DATE: _____

Here are some daily practices that help us live out the Hospitality Covenant. We invite you to join us in these and to consider other ways that we can collectively bring this life.



We speak to every person we pass by with a smile and a greeting



We take initiative to go beyond what is necessary or required.



We actively look for positive solutions in every situation



We pause to listen & understand without acting upon a snap judgement

We ask questions to learn new perspectives and reveal new ideas to recurring problems



In truth, the easiest step was to come up with the concept for a hospitality covenant. Bethany Friel assumed leadership of the hardest part—securing wide buy-in and implementation

³ Ancient Greece had two rules of hospitality: (1) Respect from host to guest. The host must be hospitable to the guest and provide him/her with food and drink and a bath, if required. It is not polite to ask questions until the guest has stated his/her needs. (2) Respect from guest to host. The guest must be courteous to the host and not be a burden.

among the 40+ members of TREK's workforce and then introducing the covenant to residents. Bethany's initial steps included: (1) engaging the senior leadership team in bi-weekly accountability meetings to model the behavior change, (2) executing a creative roll-out of the covenant in a staff-wide Synergy Session, (3) producing posters and postcards with the covenant that are always displayed and available to staff and residents in every lobby of every TREK-owned building, (4) creating a staff recognition program to reward those who actively demonstrate use of the covenant and pledges, (5) forming internal design teams to reform basic operational tools to align with the covenant (e.g., rent collection policy and procedure, staff performance reviews, new staff training), and (6) introducing the covenant to residents during the annual rent certification.

Innovation Three: Integrated Site Teams with Shared Goals and Practices. While the Hospitality Covenant was being introduced to all staff, Bethany Friel and Triple Aim worked with one site staff team at the original pilot site, Dinwiddie, to develop three practical tools to support greater site staff integration, with the goal of making the operating culture one of shared connection and aspiration. This team included a property manager, a leasing assistant, a part-time resident services staff, a lead maintenance staff, and a janitor. The three tools are:

- **A site-based strategic planning framework**, which helps a team develop specific annual goals focused on the operating culture and integrated with project operations goals.
- An **all-staff meeting ritual** (to be held either weekly or every other week) for peer learning about specific day-to-day operations, so that everyone ends up knowing something about every role and can monitor progress toward shared goals.
- An **action planning format** that facilitates refinement of annual goals as learning and new situations occur during the year.

WHAT DOES THE HOSPITALITY COVENANT LOOK LIKE IN ACTION?

"Treating people with kindness means we notice people, we value people, and we respect each other as humans first. It doesn't mean we put smiley faces in our emails or fake smiles on our faces. It means we acknowledge someone and recognize them as a person first.

Even in the hard conversations we have on a regular basis, we uphold someone's dignity by being clear and respectful while acknowledging the difficult pieces of the conversation. For example, I just had to tell a woman with a large family, who assumed she was moving into a redeveloped mixed-income community, that we did not have any more three-bedroom units. She was so angry and yelling and crying over the phone. I genuinely felt awful. I apologized and listened to her stress. I then explained to her the process and I let her know what she should expect now. I acknowledged that it sucked.

We talked a few more times over a two day period. I gave her my time, 20 minutes here and there. I wanted to preserve what little was left of the relationship because I wanted our next interaction, when her name came up on the waiting list, to go well and I wanted her to not mistrust us. Being kind and holding a boundary *can* happen at the same time. It's just really hard to do."

—Bethany Friel, Director of Mission, Culture, and People

In the first year of experimentation, the Dinwiddie team selected the shared goals summarized in the box at right, in addition to expected targets for rent, retention, expenses, etc. They also followed a basic meeting ritual that involved check-ins on what is “new and good” in team members’ lives; a “nugget of wisdom” to discuss; brief updates on management, maintenance, and community building activities; consideration of an “innovation moment” selected during the previous meeting; and meeting facilitation duties that are shared by all staff. During an interview with individual staff at Dinwiddie, the longtime maintenance staff member remarked, “I often joke about these weekly meetings, but I actually think they have helped us improve as a team and have improved our work.”

SAMPLE TEAM GOALS

The integrated site team at Dinwiddie came up with these annual goals:

- Help residents connect across the “sections” of Dinwiddie, as well as with other contiguous buildings and homes in the immediate neighborhood.
- Work to make Dinwiddie a “family friendly housing community” and make this known in the larger community.
- Increase the number of residents who are active and engaged as a part of our living community at Dinwiddie.
- Participate in learning about our community operating budget and use it as a critical tool for planning, setting expense control targets, and setting other community goals

Innovation Four: New Strategies for Recruiting and New Operating Norms for Property Managers. A common thread in all of the goals, steps, and conversations set forth in this essay is the pivotal role of the site property manager. TREK senior staff and the Triple Aim team acknowledged that it is hard to find and retain people who are both committed to and skilled at creating connected, aspirational housing communities. We have agreed that until this challenge is addressed, much of the innovation will not hold firm and produce lasting results, either for operating efficiency or people-related outcomes. We also recognize that our focus on the role of property managers is still a work in progress.

One experiment underway at TREK is to help some resident service coordinators transition to joint roles as service coordinators and site property managers. People in both positions need to exhibit strong commitment and capacity for building shared aspirations and connections with and among staff, residents, and partners. And both need to understand the importance of—and be willing to learn—the daily operations of collecting rent, repairing units, complying with regulations, and meeting budgets. TREK is banking on the hunch that it is easier to teach a resident service coordinator the property management side of the business than to convince or teach a more rigid, traditional property manager how to create the kinds of intentional spaces and practices needed to build inclusive community.

In the 82-unit property mentioned earlier, which is 100 percent deeply subsidized, former Service Coordinator Kara Rea, who now is a newly appointed site manager, has been onsite for more than two years and has actively implemented a community network-building strategy. She

holds monthly Network Nights, formed weekly mutual support circles, and recruited and supported a team of residents to help steward the expansion of the new neighborhood network. When asked to reflect on this experiment, TREK's John Ginocchi recalled attending a Network Night at which 20 residents discussed Kara's pending transition to the joint role of services coordinator/property manager. "I heard a lot of good comments and praise regarding Kara and her role, as well as their approval of her new position," John says. "There was some concern that her social service role may be diminished as she takes on management responsibility. But I am excited to see how hiring a social worker as a property manager unfolds. All indications are that this structure will be transformative and something hopefully that we can keep replicating."

Kara Rea and Bethany Friel, along with the rest of TREK's leaders and partners, are committed to demonstrating that the intentional weaving together of the framework, tools, and innovations described in this essay will improve outcomes for both the company and the residents of its mixed-income communities. And that's exactly what seems to be happening. In a recent note from the field, Bethany summed up how TREK's new property management approach, although sometimes hard to implement, is having some dramatic effects:

Last week we were doing our first round of apartment inspections. We really took a holistic approach; we talked shop and checked in on [people]. We were nearing the end of the day and went into a middle-aged single woman's apartment. It was spotless. As Kara walked in, she asked about [the woman's pet]. The resident started to cry and said she was gone; I assumed she meant the pet had passed away and that was why she was crying. We looked over the apartment, and as Kara was talking with the resident, who was still teary eyed, I noticed a note on her table. The note read something like, "You can keep all the furniture and whatever personal belongings you need—including clothing." It was dated for that day, and it was essentially a suicide note.

I probed a little to assess [the resident] quickly and then asked about the note. After dismissing the maintenance man, Kara and I stayed with her to learn more of what was happening. We thought she was having negative symptoms to her medications. After leaving a message with her doctor, we called the crisis line. During that call, we learned that she had taken 80 mg of a strong anti-depressant on top of other medications within a 24-hour period. We stayed with her until the ambulance came and she was admitted for treatment.

There is so much more to the story, and who knows what things will be like when she returns home. But I do know that by taking a more intentional approach to a regular task, we helped her live one more day.

Implications for Action

Implications for Policy.

- Federal, state and local housing agencies should more clearly define what constitutes high-quality site management and ensure the prioritization of development proposals that demonstrate genuine commitment to this higher-quality standard, including innovative practices to achieve a vision of co-investment with a broad range of residents, neighbors, and partners.
- Housing and community development advocacy organizations, at all levels, should (1) develop a specific platform that calls for and inspires an approach to property management, resident services, and resident associations that is built from a vision of shared interdependence and quality of life; and (2) communicate the equal importance of these reforms to increases in the affordable housing pipeline.

Implications for Research and Evaluation.

- A well-funded, long-term research effort is needed to document the positive impact of the Triple Aim approach and other similar innovations on both the physical and financial sustainability of mixed-income communities over time.
- Research is needed about models for transforming traditional housing companies, which tend to be led by white, upper-class professionals, into diverse, inclusive organizations that reflect the communities served.
- HUD, local public housing authorities, and other housing agencies should evaluate current policies requiring the creation of hierarchical and exclusionary resident associations and tenant councils to determine the impact of this approach on the daily operating culture of housing complexes, whether mixed-income or deeply subsidized.

Implications for Development and Investment.

- All sectors of the housing industry need to jointly invest in creating a new kind of intentional, well-branded career pipeline to attract and retain diverse young people with the commitment and compassion needed to serve as effective property managers and as future leaders of the industry.
- Special public-private venture capital is needed to encourage housing development organizations across the country to build internal property management capability and to phase out of third-party contracts, the vast majority of which do not produce high-quality, thriving communities.
- Private foundations should invest in supporting the leaders of nonprofit and profit-based housing organizations to more fully understand the white supremacist underpinnings of our current housing system (private and public) and to develop capacity for sharing positional power across lines of difference, both in their own organizations and in the community.

Implications for Residents and Community Members.

- Many advocacy organizations representing residents and community members need to evaluate their own way of operating, both internally and externally, to ensure their efforts are leading to reforms that liberate everyone to bring their best selves to solving neighborhood challenges, rather than perpetuating old forms of domination and control.

About the Volume

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The views expressed in the essays reflect the authors' perspectives and do not necessarily represent the views of The Kresge Foundation, the Federal Reserve Bank of San Francisco or of the Federal Reserve System.

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