Success Story
South Wind Village – Bay Shore, NY
September 2015
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Long Island faces a growing need for affordable housing to meet the demands of current and future Long Islanders. The need is reflected by an aging baby boomer population looking for housing that is affordable on a fixed income, and young professionals looking to rent an apartment or buy their first home, but there is more to the story. As Long Island continues to lose well-paying jobs, taxes continue to increase and the cost of transportation and utilities continue to rise, Long Islanders across many demographics are struggling to survive. Coupled with this need is a growing desire across age groups for affordable housing to be located in walkable, active, and well-connected downtowns. These downtowns feature transportation alternatives such as access to the Long Island Rail Road, bus service and bicycle infrastructure, and make it possible to walk to shopping, restaurants, and reach a variety of services.

The production of more multifamily affordable housing has increasingly been a difficult task to accomplish on Long Island. Municipalities with antiquated zoning codes and excessively long approval processes, and residents, who are resistant to multifamily development due to negative perceptions and myths about how their communities will change, have slowed the development of multifamily housing on Long Island. In addition to zoning and community perception, the difficulties in financing this type of development, and the planning, approval and construction of affordable housing continue to be a challenge. Despite those impediments there are several organizations which have successfully built affordable housing, like Long Island Housing Partnership and Community Development Corporation of Long Island, and continue to be leaders in helping to provide affordable housing on Long Island.

Housing segregation remains a serious problem on Long Island. Keeping communities divided based on race and income can have systemic effects on access to a quality education, better jobs, and improved quality of life. Encouraging the development of affordable housing throughout Long Island can begin to break down the barriers we have built over decades of an inviable housing policy.

In 2013 Regional Plan Association with support from the Long Island Community Foundation and Ford Foundation produced a report, Long Island’s Rental Housing Crisis, which found the shortage of rental opportunities was straining Long Island’s economy and that “64% of Long Islanders cannot afford an average two-bedroom rental apartment.”¹ The report provided a starting point of important information on the rental housing crisis.

In 2012 Partnership for Stronger Communities looked into mixed-income communities in Connecticut in order to better understand how the developments were working for the developers, the residents, and the communities they were built in. In their report, Success Stories: Mixed-Income Housing in CT, they found that mixed income communities were good neighbors and that “contrary to myth and misconception, they typically do not lower property values, increase school costs, or negatively impact the crime rate.”² They also found that mixed income communities are easier to finance than completely affordable housing due to a decrease in government housing subsidies. The ratio of market-rate-units to affordable-rate-units still attracted private financing and made the financing of the development possible to undertake.

In 2003 Urban Land Institute (ULI) published a report, Mixed-Income Housing: Myth and Fact, which looked at eight myths associated with mixed-income housing and provided factual information associated with each so housing advocates, policy makers and community members could be better informed. Among numerous findings, ULI’s work asserts that mixed-income housing has not been found to make a difference in property values of nearby properties, and it can “…help raise standards for good design in affordable housing, providing appealing residences that blend in with surrounding communities.”³

For the purpose of this report, a completely affordable housing development was selected. It is important to note the difficulty in finding a mixed-income or completely affordable housing development that was established long enough to examine and not tied to some form of litigation on Long Island. The parameters for selecting a development also narrowed the search to a development in close proximity to a downtown and train station.

1 Regional Plan Association, Long Island’s Rental Housing Crisis, 2013, Page 6.  
South Wind Village: Bay Shore, NY

Similar to many communities throughout Long Island, the hamlet of Bay Shore in the Town of Islip saw its downtown decline through the 1970s and ‘80s as the rise of shopping centers and malls pulled residents away from Main Street. Today, Bay Shore is an increasingly diverse community in terms of culture, income, housing options, and downtown stores and activities. It took leadership and community support in the late 1990s when Bay Shore embraced affordable housing and saw the benefits it could provide to their struggling downtown. Through a multi-year process the Downtown Bay Shore Liaison Committee (DBSLC), Town of Islip, and Long Island Housing Partnership (LIHP) worked through the challenges and fine-tuned the details of acquiring property, developing the financing, and constructing a beautiful and affordable community.

South Wind Village was built in 2001 by Beechwood Organization on what had been blighted and crime-ridden parcels. 78 townhouse units were built, of which, 52 were sold to those earning between 60% and 80% of household median income for the region, and 26 were

South Wind Village is located on Smith Avenue between Mechanicsville Road and Union Blvd (County Route 50), indicated by the blue box. South Wind sits north of the downtown (located on New York State Route 27A) and south of the Bay Shore LIRR station. Also shown on the map is the location of the YMCA, Boulton Center, and another affordable housing development, Cortland Square.
rentals to those earning no greater than 50% of household median income. The rentals were split between 16 senior rental units and 10 family rental units. South Wind Village is located on Smith Avenue between Union Blvd and Mechanicsville Road. The Bay Shore train station is under a half mile directly north and multiple bus routes stop less than a quarter-of-a-mile east of the community along Mechanicsville Road. The YMCA, the Boulton Center for the Performing Arts and all the restaurants, stores and services downtown Bay Shore has to offer, is under a half mile away. South Wind Village is well connected to Bay Shore and is a part of the story of downtown Bay Shore’s revival.

Following the development of South Wind Village other areas of blight around Bay Shore were revitalized through the development of affordable housing. Sunnybrook Court at the corner of Brooks Street and Rhodes Avenue was developed by Long Island Housing Partnership and Barbash Associates in 2004. Sunnybrook Court has 10 attached town homes approximately a half-mile east of the Bay Shore train station and under a mile north of Main Street. Another example of an affordable housing development that has been a part of the revitalization of Bay Shore is Cortland Square, which was completed in 2012. This mixed-income development contains 40 units of two and three bedroom condominiums approximately a half-mile south of the Bay Shore train station and a quarter mile north of Main Street.

Locating South Wind Village on Smith Avenue was not by chance. This area of Bay Shore was in need of revitalization. As described by a Newsday reporter during the demolition process in 1999, “The two blocks of dilapidated houses, crumbling, poorly maintained and several eventually condemned, had become for many a symbol of the area’s deterioration.”

Approximately 40 parcels in total were purchased or acquired by eminent domain and assembled for the development of South Wind Village. The location was also ideal because of its proximity to downtown Bay Shore, which like many downtowns across Long Island was struggling. Providing quality multifamily housing within walking distance of the downtown was one strategy to bring additional patrons and begin to attract new business.

Of the 52 two-bedroom townhomes for sale, 11 had New York State HOME funding which required them to be sold to first-time home buyers making no more than 60% of the median household income of Nassau and Suffolk. The other 41 homes were sold to first home buyers making no more than 80% of the median household income. The sale price after subsidies was $83,375 with a required down payment of $4,168. The affordability period on all of the for-sale units lasted un-
til the grants were paid back or to the end of the grant term. Of the 52 townhomes only two remain within the grant term.

The 26 rental units (16 one-bedroom senior units for those 62 years and older, and 10-two bedroom family units) were built for and sold to the Town of Islip Housing Authority which continues to manage and lease the rental units, which will remain affordable in perpetuity. The rental units are accessible to families and individuals making no more than 50% of the median household income and rents cannot be more than 30% of their household income. The demographic data obtained from the Town of Islip Housing Authority reports the race of the residents by household. As of May of 2015 there were 25 households with an average of 2 people per household. 64% of the households identified themselves as White and 36% of the households identified themselves as Black. 5 of the households identified as Hispanic, but the race of those households is unclear in the data.

Evaluating Success

Crime

For years before the planning and construction of South Wind Village, Smith Avenue was known as an area of Bay Shore with numerous crime related problems. Officer John Wright started in the 3rd Precinct in 1995 and worked on both foot and bicycle patrols in Bay Shore. South Wind Village is such a part of the community to him that he doesn’t think of it as a development unto itself, but for what it actually is, a public residential street in Bay Shore. He said, “Smith [Ave] used to be a trouble area for drugs, prostitution and other violent crimes, today things are dramatically better.”

According to Officer Wright crime has significantly declined during the twenty years he has patrolled in Bay Shore and that the current Smith Avenue is good example of the turnaround Bay Shore has gone through.

Today, most of the calls the police department responds to along Smith Avenue are service related – home alarms that have accidentally gone off or people in need of aid. Officer Wright recalls when Smith Ave was redeveloped and said “the buildings and properties have remained as beautiful and well maintained as when it was first built.” Other streets near Smith Avenue which were areas of concern have also improved over time as property owners have made improvements and residents take pride in their Bay Shore community.

School-Aged Children

In 2002 Jim Morgo, then President of the Long Island Housing Partnership, wrote a letter to Newsday titled “Schools Need a Lesson on Affordable Housing”. In it Mr. Morgo pointed out that resistance to affordable housing, shared across many communities, was largely because of perceived effects on schools. Unlike the all too common “knee-jerk opposition to affordable housing,” as Mr. Morgo put it,

“There is one community on Long Island that recognizes the benefit of seeing its students in affordable homes - Bay Shore. In this South Shore community, schools are credited with cultivating diversity and creativity. The acceptance of South Wind Village - a community of 52 low- and moderate-income first-time homeowner families, 16 low-income senior renters and 10 low-income family renters - was enlightening. The district welcomed, even embraced, South Wind Village. Why? Because, in the words of Bay Shore’s schools superintendent, Evelyn Holman, “stable and secure homes produce stable and productive students.”

Dr. Evelyn Holman, retired Superintendent of Bay Shore Schools and a resident of Bay Shore, is as proud and supportive of South Wind Village today as she was when it was being developed. Dr. Holman often drives down Smith Ave and said, “the contrast of the boarded up, derelict street, to this tidy, attractive community, proud of their neat neighborhood, constantly strikes me.” Dr. Holman remained active in the Bay Shore School District after her retirement, working with other leaders to establish the Evelyn Blose Holman Educational Foundation which Dr. Holman said “seeks to assure that Bay Shore students receive cultural advantages.” The students get to enjoy field trips, have artists in residence at the schools, and participate in an international travel/exchange program. Dr. Holman also knows the value of the environment for children outside the school. She said, “A stable home, good schools, a safe

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community remains the American Dream. I believed this when supporting the South Wind project which now only reinforces my philosophy.”

The Bay Shore Union Free School District had an enrollment of 5,893 kids for the 2013/2014 school year, compared to 5,698 in the 2003/2004 school year. In the decade in between the school district saw enrollment fluctuate with a low of 5,649 in 2007/2008. The school district is diverse with 38% Hispanic or Latino students, 32% White students, and 21% Black or African American students. 49% of the students are economically disadvantaged. According to the New York State Education Department, “Economically disadvantaged students are those who participate in, or whose family participates in, economic assistance programs...”6 which the state lists on their website.

South Wind Village is home to 35 students registered in the K-12 Bay Shore Union Free School District. Because South Wind Village contains a mixture of for sale and for rent units it is useful to examine the impact on schools separately. The ratio of school-aged children living at South Wind Village in for-sale townhouse units is 0.46 school children per dwelling unit. This is below the ratio of school-aged children per all occupied dwelling units across Suffolk County, which was 0.58 in a 2010 report done by the Long Island Housing Partnership.7 Estimates for the number of school-aged children produced by single-family, two-bedroom, attached housing throughout the state of New York depicts a picture of even fewer children per unit. In a report by Rutgers University, Center for Urban Policy Research in June 2006, it was estimated that housing, similar to the for-sale units found at South Wind Village, would produce 0.25 school-aged children per unit.8 This difference may be explained by how housing cost and preference are increasingly changing year by year. The data on household size, age distribution, etc. was collected from the 2000 Census and changes throughout a 15 year time-period could reflect this major difference.

The Town of Islip Housing Authority reports 11 school-aged children, ranging from eleven years old to eighteen years old, living in the 10 family rental units. The rental housing at South Wind Village has a significantly higher ratio of school-aged children, 1.1 per unit, as compared to multifamily units throughout the Town of Islip in 2010, which was 0.21 school-aged children per unit. South Wind Village’s current ratio of school-aged children per unit is also higher than Rutgers’ 2006 estimate, which was 0.45 school-aged children per two bedroom unit in a five plus unit building across all values.9 This difference may be explained by the small sample size of 10 units compared to thousands of multifamily units throughout the Town, as well as the fact that these units were specifically designated for families to occupy them. by the median income of the households. Despite the small increase in school-aged children the Bay Shore Union Free School District continued to improve and perform well on state assessments.

Myths associated with rental housing insist that rentals do not pay their share of taxes and therefore hurt schools. The Long Island Housing Partnership report looked at how multifamily housing was affecting school district finances. 60% of Suffolk County’s and 58% of the Town of Islip’s multifamily housing complexes were tax positive for school districts which means they generated more funds than the additional school costs generated by those complexes.10 40% of Bay Shore’s occupied housing units are rentals. Despite this significant proportion of rental housing, their school district continues to show financial improvements. As of 2015 the school district does not have any operating budget deficits, and Moody’s Investor Service, Inc. gave its second highest bond rating on the district’s general obligation debts.11 In addition to a solid financial position, all of the schools within the Bay Shore school district were in good standing for 2014-2015 having met the state criteria for adequate performance.

Property Values

Many factors contribute to changes in property value. One major factor was the Town of Islip’s decision to rezone an area of Bay Shore as Downtown Development District in 1994. This zoning established 8 distinctive goals to provide incentive to reuse, adapt, and improve properties throughout downtown Bay Shore. Part of the outcome of those goals was the construction of South Wind Village on Smith Avenue, which according to Robert Herrick Sr., a real estate broker and developer based in Bay Shore, “was the worst street in Bay Shore.” He said the removal of blight and the development of South Wind Village, “brought confidence that something was being done, and the town was being turned around.”

Since the 1990s the Bay Shore community has seen an increase in property values and renewed interest in the redevelopment of blighted or vacant properties.

A 2002 New York Times real estate article also identified Bay Shore’s revival and rising property values as, “…virtually unanimous agreement that fortunes have changed, and significantly, in the last several years as Bay Shore has reanimated itself through a combination of grit, a rediscovery of old strengths, private endeavor and government grants.”

According to the American Community Survey in 2013 the median home value for the Bay Shore was $328,200 and in 2000 the median home value was $147,400.

Downtown Bay Shore had undergone decades of decline before its tremendous revitalization over the last 20 years. According to a report by Suffolk County Department of Planning downtown Bay Shore had a business vacancy rate of 42.3% in 1996 and 18% in 2000, the highest vacancy rate among large downtowns in Suffolk County for both years. Looking at data provided to the United States Department of Housing and Urban Development (HUD) by the United State Postal Service (USPS), the business vacancy rate for the census tract which covers downtown Bay Shore was 4.6% as of June of 2015. A 2006 New York Times article indicated that part of the turnaround in downtown Bay Shore had to do with the attraction of jobs and visitors. The article states “To address the problem, in 1999 Islip first courted Touro, a multi-campus college with undergraduate and graduate programs, to locate a branch of its School of Health Sciences…, bringing along students and teachers.” Another key component “to spark downtown development, the town increased the number of allowable units per acre to 30 from 12…”

According to Gene Murphy, the planning commissioner of the Town of Islip from 2002 to 2010, South Wind Village was an effort of multiple people and agencies that were committed to Bay Shore. Years of involvement from community leaders such as Donna Periconi, President of the Chamber of Commerce, to assistance from the National Guard in demolition, National Grid in restoration of the nearby creek, and the involvement of former U.S. Representative Rick Lazio in helping to secure funding, the planning and execution of South Wind Village had great involvement. He said the successful development of South Wind Village was a sign that “people can invest in downtown Bay Shore to live.”

The efforts of all those involved helped engage developers, freed financing that was difficult to obtain, and secured the community’s commitment for a revitalized Bay Shore. In 2006 the Town of Islip was recognized by the New York State Economic Development Council for their efforts to revitalize downtown Bay Shore and was asked to give a presentation on the keys to success. In recalling his presentation Mr. Murphy described the effort to attract institutional anchors like Touro College, the YMCA, and support of anchors already present, like Southside Hospital. He discussed the importance of public improvements in the streetscape and waterfront, and furthermore the significance of routine maintenance which was done by the Bay Shore Business Improvement District. The improvements and ongoing maintenance helped attract office development which boosted daytime activity and the arrival of restaurants and nightlife made downtown Bay Shore a full time destination. The development of South Wind Village was part of a key strategy to bring well designed and maintained housing to blighted properties around the downtown. In addition to improving property values, residents of the housing, like South Wind Village, became new stakeholders with a reason to see their community thrive.

Larry Gargano, President of Greenview Properties which is based in downtown Bay Shore, has built several multifamily developments both in and around the community, including Chelsea Place, a beautifully designed 28-unit market rate apartment building which replaced blighted properties on the north side of the Bay Shore train station.

Greenview Properties is also constructing a new mixed-use building called Village Place in the heart of downtown Bay Shore a block south and east of South Wind Village, and plans to build a new residential development just to the west of South Wind Village called Greymore Flats. According to Mr. Gargano, the Bay Shore
Chamber or Commerce and the Town of Islip planning department have been leaders, and very supportive of efforts to revitalize downtown Bay Shore. Greenview Properties has been the property management company for South Wind Village for the last eight years. Mr. Gar-gano asserted that the success of South Wind Village allowed for the Cortland Square development to the east to be just as successful for Bay Shore. He said,

“South Wind Village plays a strong role as an example of a great affordable housing program which has eliminated the fear that arises in people’s minds.”

In addition to downtown anchors such as Touro College, and Southside Hospital, part of the revival of downtown Bay Shore can be contributed to the development of South Wind Village, which revitalized dilapidated properties in close proximity to the downtown and set the stage for future affordable and market rate developments to follow. A lot of effort went into the design of South Wind Village to improve the area as well as to ensure long term maintenance. Approximately 15 years later and South Wind Village still looks as good as it did when it opened. The buildings and properties are well maintained and contribute to increasing value around Smith Avenue.

Senior rental units section of South Wind Village that feature affordable one bedroom units. Attractive design and well maintained properties preserve and improve the value within and outside the development.

Benefits of Affordability

For the residents that purchased homes or rent the available units, South Wind Village provides a sense of stability in what continues to be an unstable and unaffordable housing market on Long Island. South Wind Village, like its successors Sunnybrook Court and Cortland Square in Bay Shore, provided well designed, constructed, and maintained housing at prices individuals and families could afford. A testament to the need for South Wind Village and the happiness and desire to stay is that as of 2012, 47 out of the 52 townhomes remained inhabited by the original owner. South Wind Village also provides much needed affordable housing for senior citizens at a time on Long Island where the construction of senior housing has been predominantly market rate.

Transition from one-bedroom senior rentals to two bedroom townhomes for-sale.

Lorraine and Frank D’Erasmo along with their children were one of the first families to purchase a home at South Wind Village. Before winning the lottery, which randomly chose applicants to purchase homes at South Wind Village, the D’Erasmo family lived in the basement of a family member’s home. In an interview in 2002 after moving into South Wind Village, Lorraine D’Erasmo recalled,

“We wanted a safe, clean place for our kids to grow up. Without the Housing Partnership, we wouldn’t be here. We wanted to own a home so bad, but with the prices on Long Island, we just couldn’t do it. Since we won the lottery, our whole lives have turned around.”

The benefits of their home purchase did not stop at the walls of their new home. Shortly after moving into South Wind Village, Lorraine D’Erasmo secured a job at a nearby assisted living center.

Having an opportunity to purchase an affordable home also led Hee and Soo Byun to open a dry cleaning business, Main Street Quality Cleaners, in Bay Shore. Not only did they become part of the community as residents, but increased their stake in Bay Shore has business owners. Being able to live less than a half mile from their business also provides cost savings and convenience.

While many of the benefits of affordability at South Wind Village will go unreported, stories like the D’Erasmo and Byun families provide insight into the value of affordable housing that extends outside of the home.

Stories from the Community

Looking back at what many would call a successful model of affordable housing, understanding the community sentiment at the time of its planning and almost two decades later, is key to gauging its success. In a recent interview with Donna Periconi, President of the Bay Shore Chamber of Commerce and former member of the committee which helped bring about the fruition of South Wind Village, Ms. Periconi was animate in indicating there was never any NIMBYism from the Bay Shore community regarding the South Wind Village project. She said the residents of South Wind Village were “as-similated into the community immediately and we never differentiated between them.” The Bay Shore community was so eager to welcome their new neighbors at South Wind Village that a party, attended by over 350 people, was held in October of 2001 exclusively to “welcome our new friends and neighbors, the residents of South Wind Village.” A particularly touching moment at the party was when the playground at South Wind Village was named after Catherine Yeager, a member of the committee who worked tirelessly to see the Bay Shore community improve.

The Islip Bulletin reported that “elected officials, bankers, business executives, and community leaders – were joined by future homeowners,” at the party to celebrate the success of the project and the years of coordination it took between the Town of Islip, Long Island Housing Partnership and the Bay Shore community.18

Frank, an owner of Whitehouse Cleaners and Laundry on Union Blvd near South Wind Village, echoed the sentiments of many throughout the community when he said South Wind Village “is a definite improvement from what was there.”

Robert Dixon, one of the first homeowners and still a current resident at South Wind Village, proclaimed in an interview for Business LI in 2000, “The people of Bay Shore are on fire, and we’re a part of this community.” At first, one may think he is referring to community anger over the introduction of affordable housing, but as one becomes familiar with the story of South Wind Village and the revitalization of Bay Shore, it is clear the “fire” is an excitement of new energy, new ideas, and new efforts. Dixon goes on to say, “Bay Shore is coming back, and we want to focus our energies on improving this town, making it a better place to live.”19

Nikki Thompson, a Bay Shore resident and president of the Bay Shore Community Corporation at the time of the opening of South Wind Village, led an effort to bring additional affordable housing to Bay Shore. In a NY Times article in 2001, which covered the efforts to bring South Wind Village to completion, Ms. Thompson captured the sentiment of the community at the time when she said, “All of Bay Shore is in the thrust of revitalization, and we will never be successful as long as one neighborhood

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In talking to her today she indicated that she considers South Wind Village to be a “successful development, which cleaned up a blighted area, and brought needed housing and people to downtown Bay Shore.”

Conclusions

The development of South Wind Village on Smith Ave in Bay Shore, NY cleaned up a high-crime area, boosted property values, was one of the first major steps in the revitalization of downtown Bay Shore, and provided much needed affordable housing to families and seniors who have since become a part of the fabric of the community. South Wind Village did bring more school-aged children to Bay Shore, but it brought children to a school district which was well-prepared and waiting with open arms to welcome new students.

The story of South Wind Village is a shared story of success across almost 15 years of progress in Bay Shore, NY. It is a story that encompasses so many small and large actions taken by people through partnerships and cooperation, which were focused on strategies and missions for the improvement of Bay Shore and Long Island. A few of the key parts of the South Wind Village story revolve around the larger mission of housing non-profits to create affordable housing, a Town strategy to transform and revitalize downtowns, and a community desire and sustained commitment to provide affordable housing, preserve diversity, and revive an ailing downtown. As part of the larger story of the transformation of downtown Bay Shore, South Wind Village stands out as a turning point which the residents, businesses, school district, and leaders rallied around. On an island and in a wider region that is in desperate need of affordable housing, South Wind Village is a shining example of how well-designed, maintained, and located housing, that is accessible to people at multiple levels of income can work for Long Island.

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