



Affordable Housing Advisory Commission Meeting
REMOTE*
June 17, 2020
7:00 PM
Remote Meeting



Agenda

- I. **Welcome and Reflection (7:00-7:15)**
- II. **Consider Approval of May 2020 Meeting Minutes (7:15-7:20)**
- III. **Fair Housing Remote Workshop Update (7:20-7:35)**
- IV. **Affordable Housing Year in Review Presentation and Discussion (7:35-8:15)**
- V. **Additional comments/questions (8:15-8:30)**
 - a) **Emergency Housing Assistance**
 - b) **Next meeting 8/19/20**

*To view the advisory board meeting, please email Rebecca Buzzard at rbuzzard@townofcarrboro.org to receive an invitation. If you wish to make public comment, at the time of the public comment, the staff person will be able to allow speakers to remotely enter the meeting one-by-one to comment. Please send any written statement or materials to the same email provided above. Requests to remotely attend the meeting shall be made within 24 hours of the meeting start time. The requester should also specify if they wish to make any comments in the email. All written statements and materials will be forwarded to the advisory board members.

Housing Discrimination: Know Your Rights

Webinar on Wednesday, July 15, 2020

7:30 p.m. - 8:45 p.m.

Topics to be discussed

- Who is protected by the Fair Housing Act?
- Who must comply with the Fair Housing Act?
- Latest information on eviction in the time of COVID-19
- Is COVID-19 considered a disability?
- Eviction & Utility Shutoff process

Who should attend?

- Tenants & Housing Advocates
- Property Managers & Landlords
- People interested in fair housing

This is a **FREE** webinar, but advanced registration is required. Register here:

www.orangecountync.gov/FairHousingWebinar

Presenters:

Jack Holtzman
Co-Director, Fair Housing Project, Legal Aid of NC
Senior Staff Attorney, NC Justice Center

Ryan Evans
Staff Attorney, Legal Aid of NC
Pittsboro Office



Co-Sponsored by:
Fair Housing Project, Legal Aid of North Carolina, Inc.
Carrboro Affordable Housing Commission
Orange County Housing & Community Development
EmPOWERment Inc.



www.orangecountync.gov/Housing

Discriminación en las Viviendas: Conozca Sus Derechos

Taller en línea el miércoles, 15 de julio

7:30 p.m. - 8:45 p.m.

Temas

- ¿Quién está protegido por la Ley de Equidad de Vivienda?
- ¿Quién debe cumplir con la Ley de Equidad de Vivienda?
- Información reciente sobre desalojos durante la época de COVID-19
- ¿COVID-19 se considera una discapacidad?
- Desalojos y cortes de servicios públicos

¿Quién debería participar?

- Inquilinos y defensores de viviendas
- Propietarios y gerentes de viviendas
- Personas interesadas en equidad de vivienda

Este es un taller gratuito, pero se requiere registro avanzado. Regístrese aquí

www.orangecountync.gov/ViviendaJustaTaller

Presentadores:

Lauren Brasil
Staff Attorney,
Fair Housing Project, Legal Aid of NC

Jesse Ramos
Staff Attorney,
Legal Aid of NC, Durham Office



Copatrocinado por:
Fair Housing Project, Legal Aid of North Carolina, Inc.
Carrboro Affordable Housing Commission
Orange County Housing & Community Development
EmPOWERment Inc.



www.orangecountync.gov/Housing



Town of Carrboro

Affordable Housing Special Revenue Fund Application

OVERVIEW

The Town of Carrboro established an Affordable Housing Special Revenue Fund in 2007. The goal of the Affordable Housing Special Revenue Fund is to advance the Town's goal of increasing and improving the stock of affordable housing within Carrboro and its planning jurisdiction.

The Affordable Housing Task Force was established in 2012 for the purpose of creating recommendations for an affordable housing strategy. In June of 2014, this goal was accomplished when the Board of Aldermen approved the Town's Affordable Housing Goals and Strategies document. From this work, an Affordable Housing Advisory Commission (AHAC) was formed in 2017. This Commission's responsibilities include:

- Reviewing and making recommendations to the Board of Aldermen for new or revised policies regarding the operation of the Affordable Housing Fund;
- Reviewing and making recommendations to the Board of Aldermen on affordable housing funding applications.

With this in mind, beginning in April 2019, requests for funding (as explained below) will be reviewed by the AHAC who will then make a recommendation to the Board of Aldermen regarding the request.

FUNDING

Source of Funds. The Affordable Housing Special Revenue Fund may be funded by payments made by developers in lieu of providing affordable housing units under the applicable provisions of the Land Use Ordinance. Other revenue sources for the fund may include grants, donations, loans, interest payments, or other contributions or assignments.

The principal and interest earned on funds received from developers, grants, donations, loans, interest payments, or other revenues that may become available also accrue to this fund. As the Affordable Housing Special Revenue Fund develops over time, it is anticipated that funding will be available for time-sensitive acquisition requests that arise outside the established funding cycles.

In June of 2018, the Board of Aldermen passed a half cent property tax increase. This will provide a yearly source of revenue for the fund of approximately \$112,500.

APPROVAL

In 2018 the Board of Aldermen voted to allow the Town Manager to approve or deny funding applications for no more than \$5,000 or 15% of the existing fund, whichever is lower. These applications do not have to provide performance measures and can apply outside of the funding cycles.

Any requests over this threshold that are not appropriated by the Board of Aldermen during the budget cycle will complete the following application. The application will be reviewed by the AHAC and their recommendation to approve or deny funding will go to the Board of Aldermen.

ELIGIBILITY

Nonprofits and individuals working with nonprofits may apply for funds to be used to address projects that meet the Town's affordable housing goals. Please see our website for a list of local housing providers: <http://www.townofcarrboro.org/982/Affordable-Housing>

In order to qualify for participation in the Affordable Housing Special Revenue Fund process, the following criteria must be met by the beneficiaries (individuals), if applicable, and substantiated by the applicant (nonprofit organizations):

- a. Beneficiaries must be a resident of Carrboro or the Carrboro planning jurisdiction, or purchasing a home in Carrboro or the Carrboro planning jurisdiction;
- b. Beneficiaries or applicants must be unable to obtain a loan, either subsidized or unsubsidized, on comparable terms and conditions;
- c. Beneficiaries or applicants must be the owner of the property in fee simple or leasehold estate and have paid or have appropriate arrangements with the county tax assessor to pay the tax bill, if the property is to be rehabilitated, or have clear title if the property is to be purchased or constructed;
- d. Beneficiaries must be residing in the property to be rehabilitated, or if purchased or constructed, occupy the property when the acquisition is completed. The building or affordable unit that is subject to program funding must have an anticipated life of at least 20 years after rehabilitation, or 30 years, if constructed or acquired;
- e. Beneficiaries must have a gross household income of 115% of the Area Median Income or less, with priority given to households at 80% of AMI and below for homeowners, and 60% of AMI and below for renters, unless otherwise described (Please see Attachment A for current income limits.);
- f. Beneficiaries must also have an intact homeowner's insurance policy, if applicable.

PROJECT REPORTING AND MONITORING

Recipients of funds for development are required to submit written progress reports to the Town by the end of the fiscal year (June 30) to monitor progress and performance, financial and administrative management, and compliance with the terms of the performance agreements. Reporting information may include: progress toward achieving performance goals, description of activities/challenges, and revisions of proposed project timelines/budgets. Please submit annual reports electronically by June 30 to: rbuzzard@townofcarrboro.org

Recipients of funds for home repairs/rehab are to submit details of work completed when submitting invoices for reimbursement of funds.

PERMITTED USES OF FUNDING

Development & Acquisition

Loans: 1. To guarantee the payment of loans or subsidize the interest rate on loans made by financial institutions to beneficiaries for the purpose of acquiring affordable housing.

2. To provide direct deferred payment loans to beneficiaries to supplement loans made by financial institutions for the purpose of acquiring affordable housing.

Land Banking: To assist in the purchase of land for conveyance to nonprofit affordable housing agencies.

Construction: To pay some or all of the expenses associated with the construction of affordable housing.

Acquisition: To acquire developed properties suitable for resale to individuals or families. Applicants qualifying under the percentage of AMI shall be approved in advance by the Board of Aldermen.

Pre-development Costs: To pay some or all of the pre-development costs (such as feasibility studies, appraisals, land options and preparation of an application) for projects to be developed for the purpose of providing rental or owner-occupied affordable housing.

Land Trust: To provide grants to organizations for land trust projects that guarantee long- term affordability of a property through a 99-year renewable ground leases or for maintenance of land trust housing stock.

Subsidy: To provide permanent subsidies to reduce the sale price of new or existing housing units so as to make them more affordable.

Rehabilitation & Preservation

- To provide for emergency home repairs of properties in the affordable housing stock. *
- To provide for the maintenance of properties in the affordable housing stock that are falling into disrepair.*
- To guarantee the payment of loans or subsidize the interest rate on loans made by financial institutions to beneficiaries for the purpose of rehabilitating affordable housing.
- To provide direct deferred payment loans to beneficiaries to supplement loans made by financial institutions for the purpose of rehabilitating affordable housing.
- To provide grants or loans to nonprofits to avoid losing homes in the permanent affordable housing stock as a result of foreclosure.

Housing Stabilization

- To provide rental and/or utility deposit grants for Housing Choice Voucher, Permanent Supportive Housing (PSH), Rapid Re-housing, HUD-VASH and Housing Opportunities for Persons w/ AIDS (HOPWA) recipients relocating to rental units in Carrboro as a result of their current rental units no longer accepting a housing subsidy listed above.*
- To provide rental and/or utility deposit grants for those who have been assessed by the Coordinated Entry process as it relates to homelessness and have identified safe, decent, and affordable housing. *
- Assistance may be used for payment of security deposits, utility connections and/or rental payments given extenuating circumstances.*

*Starred items requesting no more than \$5,000 or 15% of the existing fund, whichever is lower, do not have to provide performance measures and can apply outside of the funding cycles.

FUNDING PRIORITIES

The fund is dedicated to the development and preservation of affordable housing. Priority goals include **increasing the supply of affordable housing units, increasing the quality of housing stock while maintaining affordability, and helping people stay in the homes they have (both owners and renters).**

Priority project areas include:

- Rental projects that serve households with incomes 60% and below the Area Median Income (AMI).
- Homeownership projects that serve households with incomes 80% and below the AMI.

GENERAL APPLICATION INFORMATION AND PROCEDURES

Funding applications are accepted three times a year: October 1, January 1, and April 1. Funding is based on the availability of funds. Only as many funding cycles will be completed as necessary to use the available funds. All application documents should be submitted electronically to Rebecca Buzzard, 919-918-7438 or rbuzzard@townofcarrboro.org. Applications are reviewed by the Affordable Housing Advisory Commission and evaluated using a scoring rubric, which is available as Attachment C. The AHAC's recommendations for funding are then forwarded to the Board of Aldermen for final approval.

CHECKLIST OF REQUIRED DOCUMENTATION

Application:

- Section 1: Applicant and Project Overview
- Section 2: Project Description
- Section 3: Performance Measurements*
- Section 4: Project Budget and Pro-forma
- Section 5: Agency Description
- Section 6: Disclosure of Potential Conflicts of Interest

Other Required Attachments:

Please provide **one copy** of each of the following documents (once per year):

- Current list of Board of Directors, including addresses, phone numbers, terms, and relevant affiliations
- Current Bylaws and Articles of Incorporation
- IRS tax determination letter [501(c)(3)] (if applicable)
- Most recent independent audit (if applicable)

Applications may not be considered for the following reasons:

1. Project does not align with the eligibility criteria for these funding sources
2. Applicant has demonstrated poor past performance in carrying out projects or complying with funding guidelines
3. Applicant fails to provide required information
4. Incomplete or late applications

*Starred items requesting no more than \$5,000 or 15% of the existing fund, whichever is lower, do not have to provide performance measures and can apply outside of the funding cycles.

PLEASE CALL OR EMAIL REBECCA BUZZARD WITH FUNDING QUESTIONS: 919-918-7438 OR
rbuzzard@townofcarrboro.org

FUNDING APPLICATION

DATE:

Section 1: APPLICANT AND PROJECT OVERVIEW

A. Applicant Information

Applicant/Organization's Legal Name: _____

Primary Contact Person and Title: _____

Applicant/Organization's Physical Address: _____

Applicant/Organization's Mailing Address: _____

Telephone Number: _____

Email Address: _____

B. Project Information

Project Name: _____

Total Project Cost: _____

Total Amount of Funds Requested: _____

Please specify which permitted use of funding is being requested (as listed in Section 2: C.1.):

Proposed Use of Funds Requested (*provide a concise description of proposed project and how it meets the criteria of eligible uses*):

To the best of my knowledge and belief all information and data in this application are true and current. The document has been duly authorized by the governing board of the applicant.

Signature: _____ Date: _____
Executive Director or other Authorized Signatory

Section 2: PROJECT DESCRIPTION

Please provide a thorough description of the project (by answering the "who," "what," "when," and "where" questions about your project). **Do not assume the reader knows anything about the project.**

A. Project Name

1. Project Name: _____

B. "Who"

1. Who is the target population to be served and how will their needs be addressed through this project? If this is a repair or rehabilitation project, please address how the beneficiary meets eligibility requirements and provide substantiation, such as a deed, homeowner insurance policy statement, etc.

2. Please indicate the income of the beneficiaries (households) to be served through the proposed project. Please see **Attachment A** for the current income limits for the Durham-Chapel Hill MSA. Please also provide documented income data for the intended recipients, such as the most recent tax return, if submitting on behalf of an individual.

Income Group (Area Median Income)	Number of Beneficiaries	% of Total Beneficiaries
<30% of the AMI		
31%-60% of AMI		
61-80% of AMI		
81-100% of AMI		
101-115% of AMI		
TOTAL		

3. **Project Staff.** Please provide names of staff, contractors, and/or volunteers that will be involved with the project. Describe their responsibilities with the project and track record in successful completion of similar projects in the past:

C. "What"

1. **Type of Activity.** Please check the category under which your project falls.

- Acquisition
- Pre-development costs
- Rental subsidy
- Ownership subsidy
- New construction for homeownership
- New construction for rental
- Rehabilitation for owner-occupied or rental (including urgent repairs - see *)
- Land banking
- Grant to land trust
- Rental deposit / utility connection assistance (Max \$1,000 - see *)
- Loan payment or loan subsidy
- Foreclosure assistance
- Other (specify):

**Starred items requesting no more than \$5,000 or 15% of the existing fund, whichever is lower, do not have to provide performance measures and can apply outside of the funding cycles.*

2. Project Description. Please provide a general overview of your project, including what you are planning to produce and how you are planning to carry out the project.

D. "Where"

1. Project Location. Please be as specific as possible.

2. **Project Size (if applicable).** Please provide the size of development site: _____ acres

Please attach the following:

- Site map showing lot boundaries, locations of structure(s), and other site features General
 location map (at least ½ mile radius)

E. "When"

Attach a **detailed** timetable showing when each work task will be completed (e.g., planning; obtaining financial commitments; design; environmental review; bidding; loan closing; key milestones in construction; marketing; final inspection; occupancy; etc.)

F. Project Details

If the questions below are not applicable or the requested information is not currently available, please insert N/A.

1. Property Acquisition.

- a. Has your agency acquired real property in order to carry out the project, or is property acquisition planned? _____
- b. Is the property currently occupied? If so, attach a description of your plan to relocate.
- c. Please attach an appraisal of the property.

2. Construction/Rehabilitation Detail.

- a. How many units will be newly constructed?
- b. How many units will be rehabilitated?
- c. What is the square footage of each unit?
- d. What is the number of bedrooms in each unit?
- e. What is the number of bathrooms in each unit?
- f. How many units will have full ADA accessibility?
- g. Is the proposed project located in Carrboro Town limits, ETJ, or transitional area?
- h. Please attach the following:
 - Floor plan(s)
 - Elevation(s)
 - List of Energy Efficiency measures included in the project (if applicable)
 - List of Universal Design principles included in the project (if applicable)

- e. What supportive services, if any, will be provided through this project?

Section 3: PERFORMANCE MEASUREMENTS

A. Goals and Objectives

Please complete the following chart with information about the project's goals and objectives.

Goal/Objective	Measurement
<i>Ex: Provide housing for low- to moderate-income households.</i>	<i>Ex: By 2020, build ten units that are affordable to households earning less than 80%AMI.</i>

B. Alignment with Town Goals and adopted affordable housing strategies.

Please explain how the proposed project aligns with the Board of Aldermen Goals and adopted affordable housing strategies.

Section 4: PROJECT BUDGET AND PRO-FORMA

A. Project Budget

Attach a **detailed project budget** in Excel format showing all sources and uses of funds. Indicate which funds are committed or pending and include the % of committed funds toward this project. Attach funding commitment letters where available or copies of funding applications previously submitted.

Has an appraisal been conducted? If so, please attach.

B. Terms of Project Funding

Please specify the type of funding request for which you are applying:

Grant Loan

C. Pro-forma (for rental property only)

If you are developing a property for rent, please attach a 20-year pro-forma showing estimated income, expenses, net operating income, debt service, and cash flow.

Section 5: ORGANIZATION DESCRIPTION

A. Organization

What is your organization's . . .

1. Mission statement?
2. Incorporation date (Month and Year)?
3. Estimated Total Agency Budget for this fiscal year?
\$
4. Total number of agency staff (full time equivalents):

6. Any other features relating to organization capacity that you consider relevant, (i.e. property management experience, including accepting Section 8 Vouchers, etc.).

Section 6: DISCLOSURE OF POTENTIAL CONFLICTS OF INTEREST

Are any of the Board Members or employees of the agency which will be carrying out this project, or members of their immediate families, or their business associates:

- a) Employees of or closely related to employees of the Town of Carrboro
YES NO
- b) Members of or closely related to members of the governing bodies of Carrboro?
YES NO
- c) Current beneficiaries of the project/program for which funds are requested?
YES NO
- d) Paid providers of goods or services to the program or having other financial interest in the program?
YES NO

If you have answered YES to any question, **please explain below**. The existence of a potential conflict of interest does not necessarily make the project ineligible for funding, but the existence of an **undisclosed** conflict may result in the termination of any grant awarded.

Directions for the Affordable Housing Special Revenue Fund Application Scoring Rubric

1. After reviewing the application, please consider the application based on how well the application met the criteria reflected in Column A.
2. Column B, Maximum Points lists the maximum points for each criterion.
3. Type your score in Column C, Applicant Points. Don't award more points than the maximum.

A	B	C	D
Scoring Rubric for Repair and Rehab Applications			
1. Quality of Project for Beneficiaries			
	Maximum Points	Applicant score	
The project strives for low-cost utility expenses by utilizing energy efficient principles and products.		5	
The project rehabbed for life, i.e. incorporates Universal Design elements.		5	0
The project utilizes low-maintenance, quality materials to extend the life of the unit.		5	
Total		15	0

4. Note that the Excel document will automatically add your scores for you, including the grand total.

A	B	C	D
Scoring Rubric for Repair and Rehab Applications			
1. Quality of Project for Beneficiaries			
	Maximum Points	Applicant score	
The project strives for low-cost utility expenses by utilizing energy efficient principles and products.		5	
The project rehabbed for life, i.e. incorporates Universal Design elements.		5	5
The project utilizes low-maintenance, quality materials to extend the life of the unit.		5	
Total		15	5

What if a criterion does not apply to the application?

If a criterion does not apply to the project you are reviewing, the Excel document can adjust the maximum points awarded so that the application does not receive a lower score.

For example:

This criterion is not applicable to a project you are reviewing: *The project rehabbed for life, i.e. incorporates Universal Design elements.*

You will need to adjust the total maximum points so that the application is not penalized for a criterion that does not apply to it. To do this:

1. Delete the points in the middle column, Column B, Maximum Points. You'll notice that the maximum points for this section and in the grand total subtracts those points.

A	B	C	D
Scoring Rubric for Repair and Rehab Applications			
1. Quality of Project for Beneficiaries	Maximum Points	Applicant score	
The project strives for low-cost utility expenses by utilizing energy efficient principles and products.		5	
The project rehabbed for life, i.e. incorporates Universal Design elements.			
The project utilizes low-maintenance, quality materials to extend the life of the unit.		5	
Total		10	

2. Score for the other criteria in Column C, Applicant Points, but leave the cell for the criterion which is not applicable, blank.

A	B	C	D
Scoring Rubric for Repair and Rehab Applications			
1. Quality of Project for Beneficiaries	Maximum Points	Applicant score	
The project strives for low-cost utility expenses by utilizing energy efficient principles and products.		5	4
The project rehabbed for life, i.e. incorporates Universal Design elements.			
The project utilizes low-maintenance, quality materials to extend the life of the unit.		5	5
Total		10	9

Scoring Rubric for Repair and Rehab Applications

Scoring Rubric for Repair and Rehab Applications			
1. Quality of Project for Beneficiaries	Maximum Points	Applicant score	
The project strives for low-cost utility expenses by utilizing energy efficient principles and products.	5		
The project rehabbed for life, i.e. incorporates Universal Design elements.	5		
The project utilizes low-maintenance, quality materials to extend the life of the unit.	5		
Total	15	0	
2. Affordable Housing Impact	Maximum Points	Applicant Score	
The project aligns with the Town of Carrboro's Priority Affordable Housing Goal to increase the quality of housing stock while maintaining affordability.	10		
The project aligns with the Town of Carrboro's Priority Affordable Housing Goal to help people stay in the homes they have.	10		
The project includes provisions to ensure long-term affordability.	5		
Total	25	0	
3. Project Feasibility	Maximum Points	Applicant Score	
The project has other sources of funding in place at the time of the application.	5		

The project timeline is realistic and feasible to achieve successful project completion.	5		
The project budget is complete and reasonable to achieve successful project completion.	5		
Total	15	0	
4. Capacity and Experience			
	Maximum Points	Applicant Score	
The applicant has sufficient staffing and demonstrated expertise to manage all aspects of the project.	15		
Total	15	0	
5. Community Collaboration, Engagement and Support			
	Maximum Points	Applicant Score	
The project included intended beneficiaries in the design and/or planning.	10		
The applicant has evidence of coordinating the application with other organizations to complement/support the project.	5		
Total	15	0	
Grand Total Application Points	Grand Total Maximum Points for Repair & Rehab Applications	Grand Total Applicant Score	
Add totals from 1-5 (green boxes.)	85	0	0%

	A	B	C	D
1	Scoring Rubric for Development Applications			
2				
3	1. Quality of Project for Beneficiaries	Maximum Points	Applicant Score	
4	The project is easily accessible to community services and resources such as schools, healthcare, groceries and public transportation.	5		
5	The project strives for low-cost utility expenses by utilizing energy efficient principles and products.	5		
6	The project is designed for life, i.e. incorporates Universal Design elements.	5		
7	The project utilizes lowmaintenance, quality materials to extend the life of the unit.	5		
8	Total	20	0	
9				
10	2. Affordable Housing Impact	Maximum Points	Applicant Score	
11	The project aligns with the Town of Carrboro's Priority Affordable Housing Goal to increase the supply of affordable housing units.	10		
12	The project includes provisions to ensure long-term affordability.	10		
13	Total	20	0	
14				
15	3. Project Feasibility	Maximum Points	Applicant Score	
16	The project has other sources of funding in place at the time of the application.	5		
17	The project timeline is realistic and feasible as well as demonstrates zoning compliance.	5		
18	The project budget is complete and reasonable to achieve successful project completion.	5		
19	Total	15	0	
20				

	A	B	C	D
21	4. Capacity and Experience	Maximum Points	Applicant Score	
22	The applicant has successfully developed and completed comparable projects in compliance of jurisdictional regulations, within proposed budgets and timelines.	10		
23	The applicant has sufficient staffing and demonstrated expertise to manage all aspects of the project.	10		
24	Total	20	0	
25				
26	5. Community Collaboration, Engagement and Support	Maximum Points	Applicant Score	
27	The project included intended beneficiaries in the design and/or planning.	2		
28	The applicant has evidence of coordinating the application with other organizations to complement/support the project.	3		
29	The applicant has plans to develop linkages to other community programs, resources or projects related to the proposed project to coordinate its activities so solutions are holistic and comprehensive.	5		
30	Total	10	0	
31				
32	Grand Total Application Points for Development Applications	Grand Total Maximum Points for Development Applications	Grand Total Applicant Score	Grand Total Applicant Score as %
33	Add totals from 1-5	85	0	0%

Questions for Non Profit Applicants to the Affordable Housing Special Revenue Fund

Note: questions will be in a simple survey format like Survey Monkey

1. Is the application easy to use and understand?
2. Does the application allow you to provide the information you need to convey about your project?
3. Would you make changes to the application? If so, what changes would you make?
4. Has Town staff been available to discuss your application, before and after submission? Have discussions been helpful?
5. How do the application deadlines of January 1st, April 1st, and October 1st work for your organization in terms of other public and private application deadlines?
6. Would the opportunity to briefly present your application to the Affordable Housing Advisory Commission be helpful?

(The AHAC meetings are open to the public, but we do not have a formal presentation built into the process.)

7. Is there anything you want to add about your experience with the pilot application process?



The Affordable Housing Advisory Commission

MEMBERS:

The Affordable Housing Advisory Commission shall consist of seven members appointed by the Board of Aldermen and two non-voting liaisons.

- (1) Five residents of the Town of Carrboro;
- (2) One resident of the Town's extraterritorial zoning jurisdiction or the Town; and
- (3) One member who need not be a resident of the Town of Carrboro, but who must possess special expertise related to affordable housing.

RESPONSIBILITIES & DUTIES:

The purpose of the Carrboro Affordable Housing Advisory Commission is as follows:

- (1) To review and make recommendations to the Board of Aldermen concerning new or revised policies regarding the operation of the Town's Affordable Housing Fund;
- (2) To review and make recommendations to the Board of Aldermen for new or revised Land Use Ordinance provisions related to the Town's Affordable Housing Goals and Strategies;
- (3) To review and make recommendations to the Board of Aldermen on Affordable Housing Funding Applications;
- (4) To carry out specific responsibilities that may be required in accordance with the Affordable Housing Fund Policies or the Town's Land Use Ordinance;
- (5) To annually review the Town's Affordable Housing goals, data and other progress indicators, and to make recommendations to prioritize or adjust activities based on such review;
- (6) To offer recommendations to the Board of Aldermen for new or specific actions the Town may pursue to increase the availability of diverse, affordable housing in Carrboro, particularly as new opportunities arise or are brought to the Commission's attention by Staff;
- (7) To review and approve annual and other Staff reports to the Board of Aldermen;
- (8) As needed or as requested by Town Staff, to organize subcommittees focusing on specific topics or issues to help advance specific work; and
- (9) To identify and research affordable housing trends and issues.

Town of Carrboro Affordable Housing Goals and Strategies

The Town of Carrboro is devoted to providing opportunities for safe, decent and affordable housing for all residents no matter their age, ability or income level.

Goal	Strategies	Target Completion Date	Partners/Resources Needed	Updates and Plans
1. Affordable Homeownership (Target income range is 60%-115% AMI)				
1.1 Increase number of homeownership units that are permanently affordable in Carrboro. 2024 goal is to have 85 affordable ownership homes. In July 2019, there were 70 affordable homeownership units.	A. Gather more data from the developers about what percentages will work to both incentivize them and respond to the market condition.	FY2024	Developers, Orange County Affordable Housing Coalition, non-profit housing developers, staff	1. Gathering cases of successful voluntary inclusionary programs nationally and analyzing against local programs; goal is to determine best practices for recommendation. 2. Work with affordable housing nonprofits to permanently preserve existing affordable units and to create new affordable units. 3. Exploring the use of abandoned properties, Town-owned properties, rapid acquisition fund. and tiny homes.
	B. Request that the BOCC continue to fund impact, permitting fees for non-profits.	Completed		School Impact fee deauthorized by the State.
	C. Analyze modifying the ordinance to reflect a model that will both incentivize developers and respond to market conditions.	FY2019-20	Orange County Affordable Housing Coalition, non-profit housing providers, staff	Based on findings of 1.1A in conjunction with the Comprehensive Plan.
	D. Identify/build dedicated subsidy source to assist with land trust transactions.	Ongoing	Consolidated plan partners; CHT, Northside Neighborhood Initiative, Self-Help, and other AH Coalition participants	The Affordable Housing Special Revenue Fund is a dedicated funding source to support affordable housing initiatives, including subsidizing land trust transactions. In June of 2018, the Board of Aldermen passed a half cent property tax increase which will increase to a penny and half over 3 years.
1.2 Fully evaluate and reduce housing density restrictions to slow the climb of housing prices and diversify housing stock, particularly in high transit areas.	A. Schedule a community discussion to examine open space requirements and their implications on housing prices and the feasibility for inclusion of affordable units.	Ongoing	For and non-profit housing providers, citizens, environmental advocates, recreation advocates	Based on findings of 1.1A, reevaluate and incorporate findings into Comprehensive Plan.
	B. As a component of the parking plan, determine whether modifications to parking requirements could materially affect homeownership prices, development opportunities, and density. Unbundled parking for condominiums and townhouses should be included in this analysis.	FY 2019-20	Staff, Parking plan consultant, ED Planning	Reevaluate for Comprehensive Plan
	C. Explore opportunities to modify zoning and land-use ordinances related to in-fill residential, connected housing, zero lot-line housing, and mixed-use developments.	Completed	Staff, intern, graduate planning workshop students, development community	With 1.2A above, reevaluate and incorporate findings into Comprehensive Plan.
1.3 Decrease barriers to first-time homeownership and to homeownership retention, particularly among seniors	A. Develop and implement a clear set of priorities and policies for the use of dedicated funding that includes opportunities to support this goal.	Ongoing	Orange County Affordable Housing Coalition, Board of Aldermen, Consolidated Plan partners	1. Updated the Affordable Housing Fund Guidelines to reflect Goals and Strategies Document 2. Subcommittee of Orange County Affordable Housing Coalition formed specifically to address housing for 30% AMI and under group. 3. Engagement in Orange County Master Aging Plan Committee informs affordable housing priorities
	A1. Down payment assistance for families participating in local homebuyer education programs.	Ongoing	Federal and state funding for down payment assistance, energy up fits, repairs, etc. Durham staff - Southside program as model	1. BoA approved the Buyer Identified Homeownership Program 2. Staff worked with CHT to implement - 1st implementation phase is targeting Town employees. Two families helped.

	A2. Grants for critical home repairs, energy efficiency, up fits to accommodate changing mobility, etc. +opportunities to decrease utility payments.	Ongoing	Affordable Housing Advisory Commission, BOA and staff	1. Annually award grants from the Affordable Housing Special Revenue Fund to nonprofits conducting critical repairs, improvements in energy efficiency and/or universal design upgrades on behalf of qualifying individuals. 2. Participation in OWASA's Affordability Outreach Program to decrease water bill payments for residents. 3. Engagement in Orange County Preservation Coalition
1.4 Continuously improve public transit access, with a particular eye to moderate-income homeownership communities and developments with an affordability component.	A. Determine whether subsidizing transit access should be an approved use for dedicated housing funds.	Ongoing	Orange County Affordable Housing Coalition, Board of Aldermen, Consolidated Plan partners	With 1.3 above. Not currently an approved use of funds in the Affordable Housing Special Revenue Fund but access to public transit is measured when scoring applications to the Affordable Housing Special Revenue Fund.
	B. Partner with CHT, and homeowners associations to identify and pursue opportunities to fund or otherwise make practical greater transit service to growing areas, including feeder systems to main routes.	Ongoing	Chapel Hill Transit, Transit Partners Committee, developers, HOAs, GoTriangle	"Provide geographic equity" and "Support transit-oriented land use" is a long term goals of the Orange County Transit Plan.
	C. Play a leadership role at local and regional transit 'tables' to ensure future transit priorities and policies support affordable housing goals.	Ongoing	Transit Partners, DCHC MPO	Alderman Seils, Alderman Chaney and Town staff serve on the Partners Transit Committee
2. Affordable Rentals (Target income is 60% or less of AMI)				
2.1 Increase number of rental units that are permanently affordable to individuals and families earning less than 60% of AMI. 2024 goal is to have 470 affordable rental units. By July 2019, there were 370 affordable rental units.	A. Modify ordinance to reflect a model that will both incentivize developers to include affordable units in their rental developments while also responding to market conditions.	Ongoing	Developers/Property Owners, Orange County Affordable Housing Coalition, Board of Aldermen, Staff	With 1.1 and 1.2 plans 1. FY19-20 Orange County Affordable Housing Coalition to make recommendations of changes to consider in the development review process 2. CUP was used to create 20 affordable rental units in Shelton Station. Opened in 2019. 3. The Landings LIHTC apartment community now permanently in the land trust.
	B. Work with Orange County, the University, and other landowners to examine, identify and reserve one or more tracts for future LIHTC and/or HUD-restricted rental communities.	Ongoing	Local governments, property owners, University	1. Staff created a map to identify possible LIHTC parcels and met with a developer to analyze the map 2. Have worked with OC and Chapel Hill to identify publicly owned land that could be suitable for affordable housing development 3. CASA LIHTC development off Merrit Mill Road approved in 2018.
	C. Better position the town for future affordable rental development /redevelopment opportunities by cultivating relationships with experienced non-profit affordable rental housing developers.	Ongoing	OC Housing Coalition, NC Housing Coalition, DHIC	1. Staff engaged with nonprofit affordable housing agencies in OC and state level. Continuously working to build relationships. 2. Staff participate in monthly Orange County Affordable Housing Coalition Meetings and serve on its subcommittees.
2.2 Reduce negative effects of parking requirements on rental prices.	A. Fully examine research and data regarding parking density and "bundling" to determine best approaches to achieve this goal.	Ongoing	Planning staff	Reevaluate for Comprehensive Plan
	B. Utilize Town's parking management policy to support this goal.	Ongoing	Planning staff	Reevaluate for Comprehensive Plan
2.3 Slow the pressure on rental prices by increasing rental housing stock, particularly in high-transit areas.	A. Examine and consider reducing restrictions on accessory dwelling units. This strategy has the potential to support homeownership affordability by enabling homeowners to generate income to support their homeownership costs.	Ongoing	Developers, Orange County Affordable Housing Coalition, non-profit housing developers, planning staff	With 1.1, 1.2, and 2.1 plans 1. Research and consider tiny homes and modular homes in this strategy, in progress, Orange County Affordable Housing Coalition

2.4 Reduce erosion of rental housing quality and affordability	A. Research effective voluntary rental registry models and determine the efficacy of a similar program in Carrboro. If feasible, determine opportunities to implement a registry or rating system through a non-profit or other civic organization, with Town support.	FY2021	Orange County Affordable Housing Coalition, staff	Can be explored.
	B. Require all landlords with more than one unit of rental property to register for a business privilege license, and examine use of business regulations to enforce better stewardship of housing and neighborhoods.	FY2021	Orange County Affordable Housing Coalition, staff	Can be explored.
	C. Gather and examine rental housing data to better anticipate and monitor opportunities/conditions for redevelopment/rehabilitation.	Ongoing	OC Housing Coalition, Orange County HHRC/Chapel Hill (Consolidated Plan partners)	Publicly available housing data has been collected and analyzed to gain a better understanding of the housing and affordable housing market in Carrboro. Reviewed annually.
	D. Convene landlords and property managers on an annual (regular) basis to build positive relationships, educate about Carrboro's housing expectations and policies, and encourage transparency about redevelopment/rehab/sale plans.	FY2021	Orange County Affordable Housing Coalition, staff	Master leasing being explored by Orange County Affordable Housing Coalition.
2.5 Examine the current marketplace for mobile and modular homes.	A. Educate the Board of Aldermen about the difference between the housing styles and regulations that apply.	FY2021	Orange County Affordable Housing Coalition, Orange County Collaborative, staff	Can be explored further. Orange County Affordable Housing Collaborative and Coalition considering mobile homes as affordable housing strategy.
3. Overarching Priorities				
3.1 Concerted Land Use Planning/small land use plan for three high priority/high potential areas.	A. Identify the three high priority/potential areas that are ripe for development or re-development. Could include: downtown, Jones Ferry Corridor, Estes Drive.	Ongoing	Affordable Housing Advisory Commission, BOA and staff	1. Shelton Station apartments (20 units reserved for affordable housing created in downtown district.) 2. Staff identified 3 Town-owned parcels suitable for affordable housing 3. Currently working to create a map of naturally occurring affordable housing (NOAH) in Carrboro.
	B. Consider the current planning processes that are underway and share coordination and overlap.	Ongoing	Affordable Housing Advisory Commission, Orange County Affordable Housing Coalition, staff	Comprehensive Plan Development.
3.2 Improve opportunities for developers and potential partners to identify affordability in a project.	A. Include members of OCAHC in initial development review to encourage creative solutions/opportunities for affordable housing to be integrated into projects, and/or identify best opportunities to secure payment-in-lieu.	Ongoing	Affordable Housing Advisory Commission, Orange County Affordable Housing Coalition, staff	Staff provides information to OCAHC on proposed developments to allow an opportunity to receive their input
3.3 Develop dedicated funding source--in partnership with county and peer municipalities	A. Explore the parameters of an AH Bond. □	FY2018-19	HOME Consortium, Consolidated Plan Partners, Orange County Affordable Housing Coalition, and Downtown Housing Improvement Corporation (DHIC).	1. In June 2018, the BOA passed a half-cent property tax increase over the next three years, increasing to a cent and a half increase afterward. This will provide a yearly source of revenue for the Affordable Housing Special Revenue Fund. 2. In November 2018, Chapel Hill passed a \$10M affordable housing bond.
	B. Explore a public private fund for example TCF.	Completed		Can be explored further.
	C. Find out about tax deduction.	Completed		CASA is building a LIHTC development on Merritt Mill Road, supported by Affordable Housing Special Revenue Fund.
	D. Look to identify complimentary external funding that could be better leveraged with municipal participation.	Ongoing	Orange County Affordable Housing Coalition, staff	Additional funding opportunities, including federal and state grants, are assessed through the Orange County Affordable Housing Coalition.

	E. Assessment of the most cost effective strategies-if we had a pot of money what is the best way to use it.	Completed	University, staff	In 2015, Staff worked with a UNC Capstone Group to analyze the cost effectiveness of each strategy, including subsidy amount needed and target population for each AH development model
3.4 Ensure implementation of the Affordable Housing Strategy	A. Affordable Housing Advisory Commission meets monthly. <input type="checkbox"/>	Ongoing		Town Affordable Housing Advisory Commission established in 2018 and meets monthly. Includes a Board liaison and a staff liaison.
	B. Ensure operationalization and monitor progress of affordable housing plan by staffing at least 1/2 time.	Ongoing		Staffing is provided by the Program Manager and Management Assistant (at least 1/2 time) and Planning staff (Director and Planning Administrator)
	C. Continuing to look at data and continuing to understand it-existing stock-number of affordable units and distribution-including transit access, non-motorized travel, overlaid with the distribution of housing.	Ongoing	Affordable Housing Advisory Commission, Orange County Affordable Housing Coalition, staff	1. Staff collects data on existing permanent affordable housing and updates on an annual basis 2. Creating a GIS map which strives to reflect current affordable housing and its proximity to resources
3.5 Provide greater incentives for developers to include affordable housing in their projects	A. Expedited review for projects that include affordable housing component.	Ongoing	Affordable Housing Advisory Commission, Orange County Affordable Housing Coalition, staff	With 1.1, 1.2, 2.1, and 2.3 plans 1. Include Affordable Housing Advisory Commission in review process. 2. Include in Comprehensive Plan Development.
	B. Ask 3-5 developers to do an assessment of the costs for all of the LUO requirements-how much does this increase the cost per unit, or the rent per unit.	Ongoing	Affordable Housing Advisory Commission, Orange County Affordable Housing Coalition, staff	With 1.1, 1.2, 2.1, and 2.3 plans in conjunction with Comprehensive Plan
	C. Evaluate the provision of public sector assistance for infrastructure in exchange for the provision of some percentage of affordable units (scaled).	Ongoing	Affordable Housing Advisory Commission, Orange County Affordable Housing Coalition, staff	With 1.1, 1.2, 2.1, and 2.3 plans in conjunction with Comprehensive Plan
3.6 Reduce utility costs	A. Work with OWASA, Explore grants for energy efficiency.	Ongoing	OWASA, staff	Extension of Rogers Road sewer completed in June 2019. Provided public assistance to eligible households.
3.7 Acquisition of land/property-be proactive with OWASA in the land or parcels they are saying they will offer to municipalities first-Start to engage with them	A. OWASA-example but there are other options.	Completed	OWASA, staff	1. Staff has worked with OWASA to identify and evaluate potential sites. 2. All sites in Carrboro are mission critical and are not available to be sold or used for affordable housing. <input type="checkbox"/>
	B. Consider condemned properties -provide an incentive for homeowner to sell loan fund for Habitat, Empowerment to allow for the property to be renovated and fixed up.	Ongoing	Affordable Housing Advisory Commission, Orange County Affordable Housing Coalition, staff	Staff has researched the process for acquiring condemned properties for the use of affordable housing but further work is needed to determine incentives and possible policy changes.

Prioritizing Affordable Housing Strategies Results

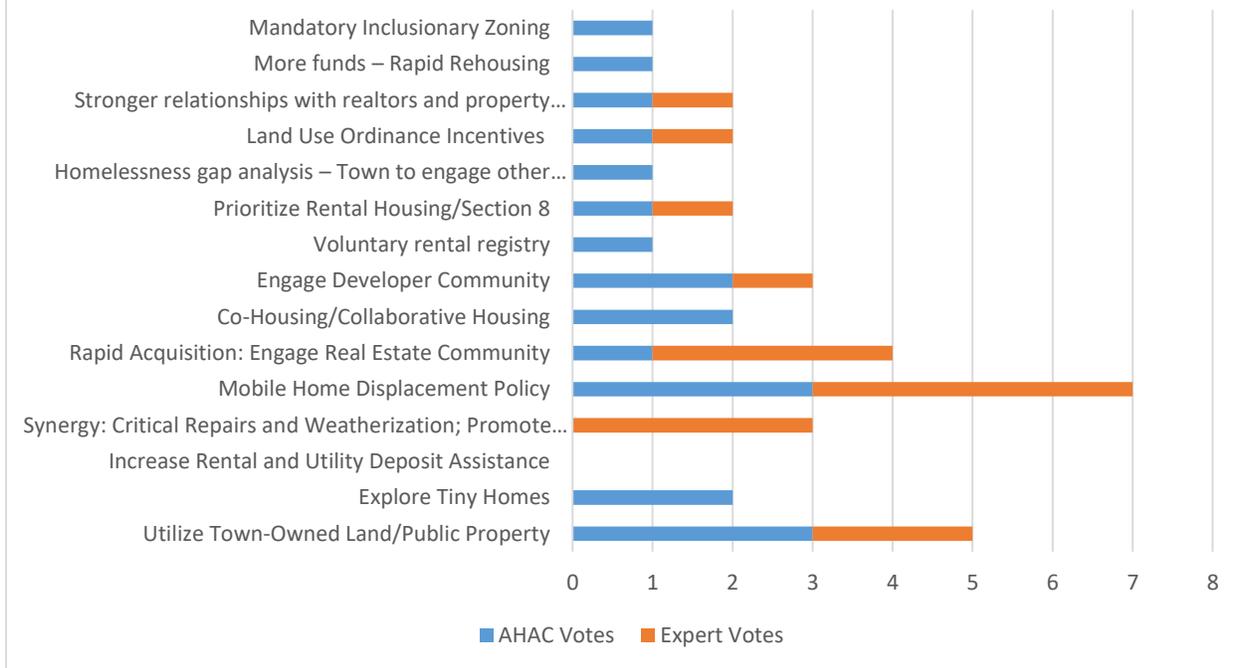
Board identified items staff indicated are already in the works for the near future:

- *Review Policies and Ordinances to Maximize the Potential for Affordable Housing – Comprehensive Plan*
- *Community Conversations*

Vote Results:

Strategy	AHAC Votes	Expert Votes	Total
Utilize Town-Owned Land/Public Property	3	2	5
Explore Tiny Homes	2	0	2
Increase Rental and Utility Deposit Assistance	0	0	0
Synergy: Critical Repairs and Weatherization; Promote energy efficacy	0	3	3
Mobile Home Displacement Policy	3	4	7
Rapid Acquisition: Engage Real Estate Community	1	3	4
Co-Housing/Collaborative Housing	2	0	2
Engage Developer Community	2	1	3
Voluntary rental registry	1	0	1
Prioritize Rental Housing/Section 8	1	1	2
Homelessness gap analysis – Town to engage other jurisdictions to fund gap	1	0	1
Land Use Ordinance Incentives	1	1	2
Stronger relationships with realtors and property management companies/landlords	1	1	2
More funds – Rapid Rehousing	1	0	1
Mandatory Inclusionary Zoning	1	0	1

Prioritizing Affordable Housing Strategies



Creating a Mobile Home Displacement Policy received the greatest number of votes overall and tied with the greatest number with utilizing Town-owned land for AHAC representatives.

Recommendation: Staff bring back information regarding existing mobile home communities in the jurisdiction, as well as local area policies regarding mobile home displacement, so the AHAC can delve into the topic and eventually hone in on best practice strategies or policies.

Staff, including Planning staff, provide the AHAC with information about current Town-owned property and each parcel's suitability for affordable housing, including unit potential. An overview of current affordable housing builders can be presented and ways to partner with these builders can be explored.