

# Utah Workforce Housing Initiative

*“Cultivating Community”*



**Utah League of Cities &  
Towns**

**Municipal Workshop**

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# Presenters:

- **Marci Milligan**
  - Lotus Community Development Institute, 501(c)3
- **Rhoda J. Stauffer**
  - RJS Community Development Resources
- **Richard Walker**
  - Tightline Community Resources
- **Supporting Workshop Team Members**
  - Clayton Fullton, State of Utah
  - Pauline Zvonkovic, HUD



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# UWFHI Background

## Collaborative Effort to:

- Assist communities in
  - Understanding the unique housing needs of their community members; and
  - Understanding how to be a partner in actively promoting and developing additional housing opportunities
- Focus on a mix of prices, housing types, designs and programs
- Key accomplishments to date – see handout!



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# UWFHI Background

## Key Project Sponsors:

◆ Community Banks and Limited Purpose Financial Institutions including:

- Bank of American Fork, Barnes Bank, Bank of Utah, Central Bank, GE Capital Financial, GE Money Bank, GMAC, Golman Sachs & Co, Lehman Brothers, Morgan Stanley Bank, State Bank of Southern Utah, Sun First Bank, Town & Country Bank, Transportation Alliance, Village Bank (3 new banks in 2009) and the Utah Community Reinvestment Corporation.

- ◆ Federal, State and Local Governmental Entities
- ◆ Lotus Community Development Institute
- ◆ Utah Nonprofit Housing Corporation



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# Overview of Guidebook

## Section I: Setting the Context

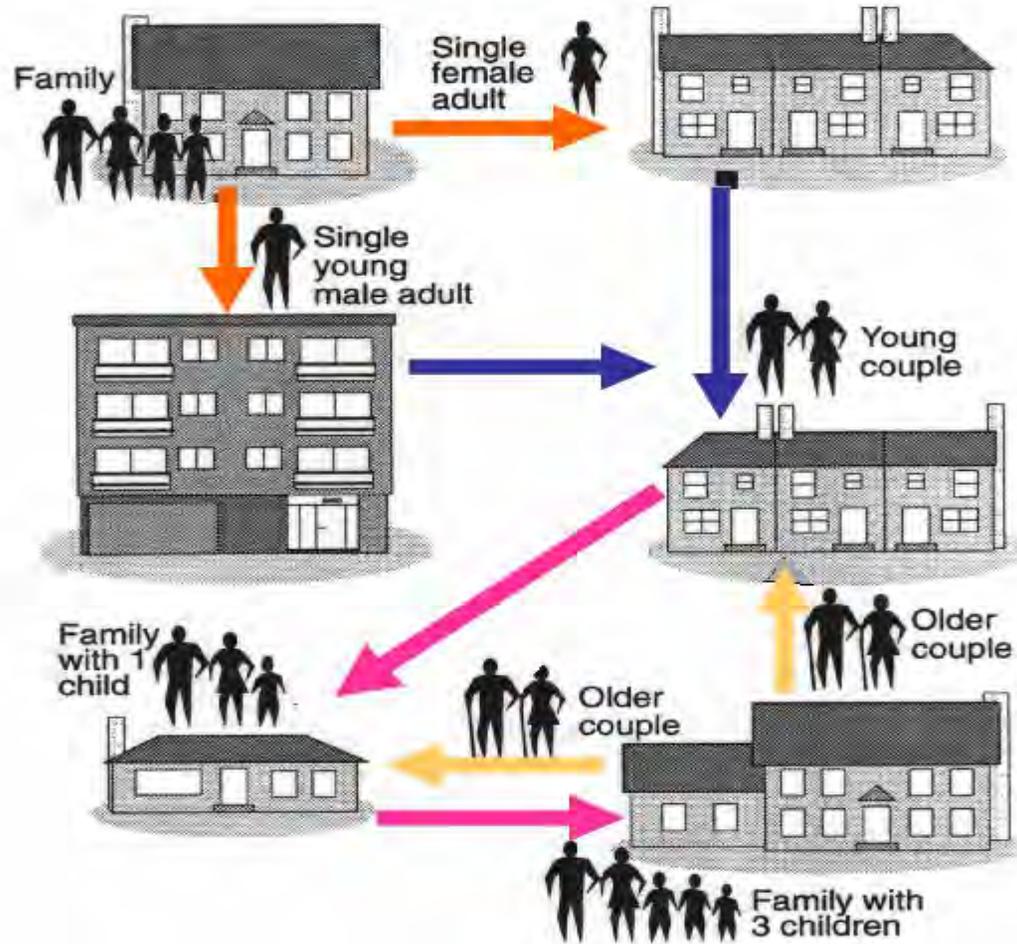
- Average household sizes are dropping
- Number of elderly are on the rise
- Ever greater needs for housing that is affordable to a variety of workforce wage levels @ > \$23,000
- Life-Cycle housing – planning needs for a diversity of housing types



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# Life-Cycle Housing Defined



p. 8



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# Overview of Guidebook



## Section II: Formats for Planning

- Regulatory requirements
- Housing as a means of protecting important local values
- Engaging the community in your planning processes
- Planning format outline; p. 18



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# Overview of Guidebook

## Section III: Design Options

- Well designed buildings are important to community acceptance
- Rental property options: multi-family, garden-style, townhouses
- Ownership options: single family, townhouses, condominiums and shared equity options
- Addressing the “*Five Affordable Housing Myths*”; p. 23



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# Overview of Guidebook

## Section IV: Facilitating the Development of Workforce Housing

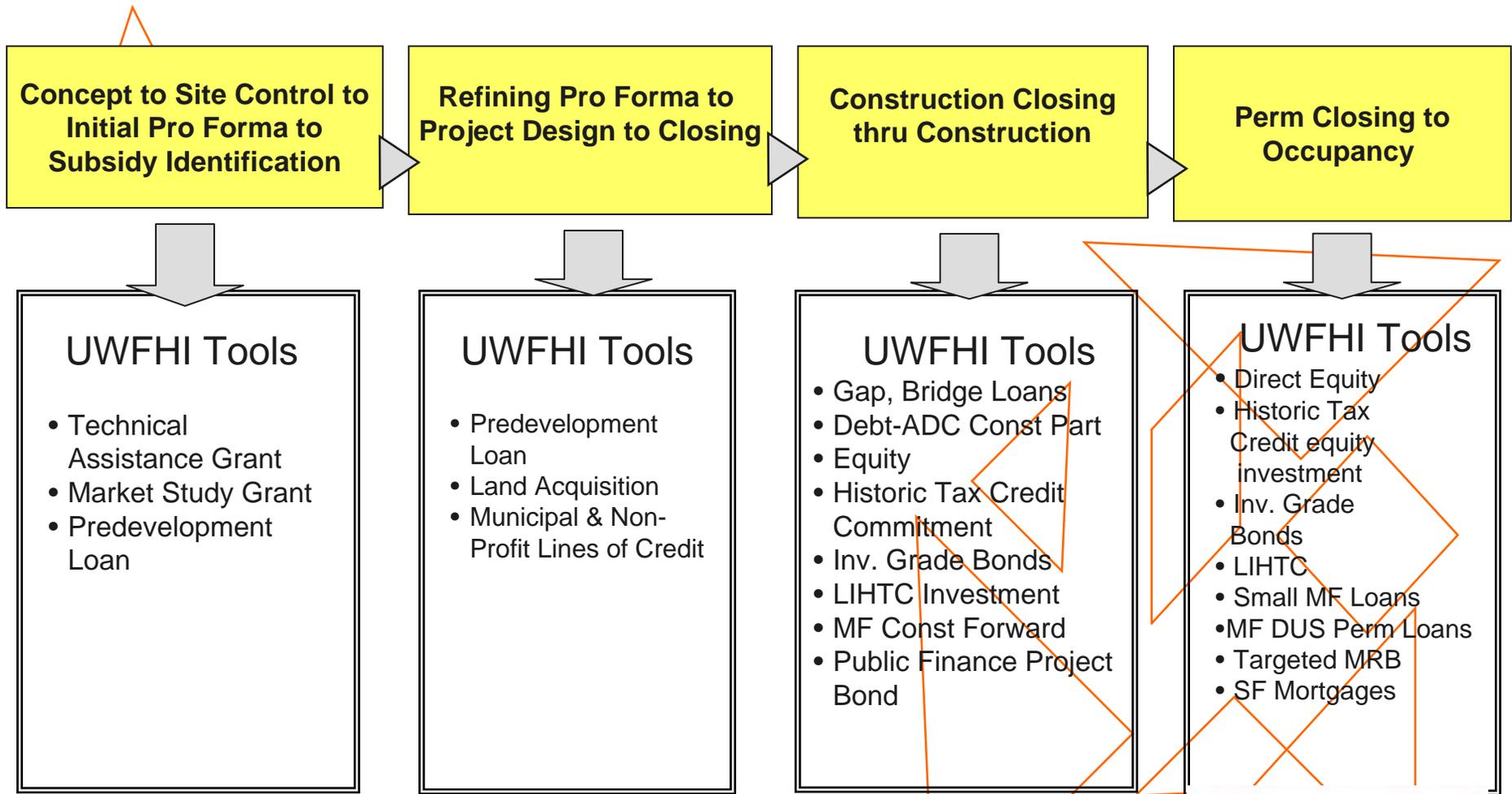
- Assessing the regulatory climate; p. 34
- Creative use of density requirements
- Inclusionary and overlay zones
- Review processes
- Fees



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## Section V: UWFHI Financing Structures & Options



p. 51



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# Overview of Guidebook

## Section VI: Assessment Model ~ Software Program

- A critical new interactive tool for assessing the housing and economic trends in your community: (1 input page, 9 easy steps with click/drag ease, local verification recommendations and automated reports); p.78



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# Overview of Guidebook



## Section VII: UWFHI = A Community-Based Process

*Cultivating Community through research/Data Analysis, Creative/Cross Functional Planning, Technical Assistance, Project Development & Responsive Funding Solutions; p. 147*

**Utah Cities & Counties  
HB 295**  
Required Housing  
Plan Development

**UWFHI**  
Project Coordination  
Development  
and Management



Technical Assistance,  
Statistical Analysis  
Software and  
Planning Guide

Toolbox,  
Demographic  
Software, Workshops

Coordinate Funding  
Resources and  
Applications

Industrial + Community Banks  
OWHTF/LIHTC/UCRC/RC/RCAC,  
Municipalities, Private Funding

Coordinate Housing  
Projects &  
Developers

Nonprofit Housing Developers,  
City Housing Authorities and  
City Planners, RDA, HUD

Economic  
Development &  
WorkForce Housing  
Baseline Research

Creation of transferable best  
practice models



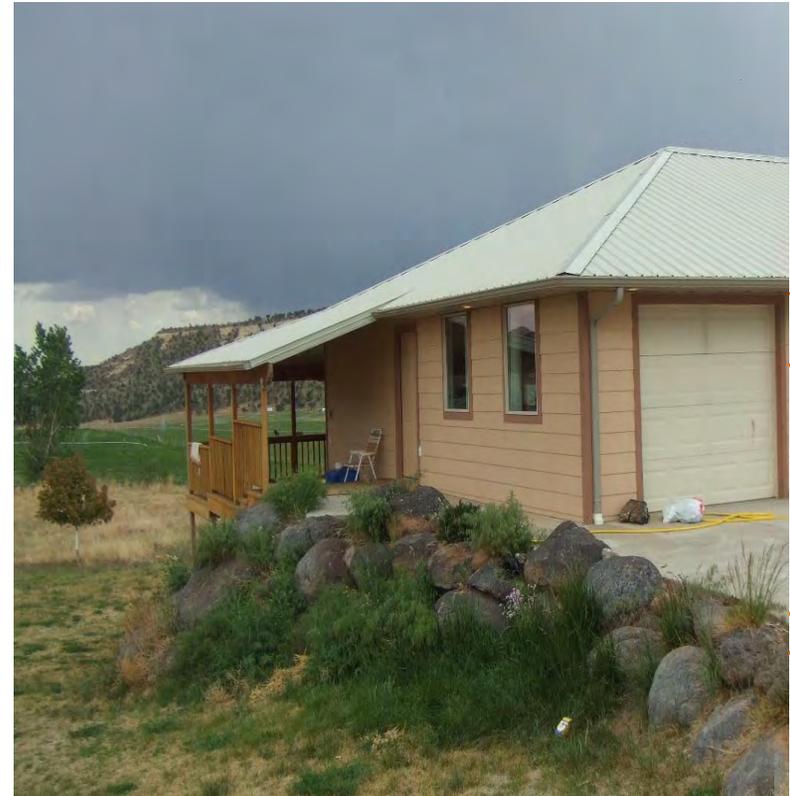
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# Overview of Guidebook

## Appendix

- Glossary of Terms; p.148
- Helpful Resources; p.157
- Sample Documents; p.173
- Bibliography; p.189



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# Review of Regulatory Barriers

Please take time to go to **p. 34 (hud.gov/rbc)** for a wide array of new resources **NO YES**  
**in the guide book and on-line!**

|    |   |  |  |
|----|---|--|--|
| 1  | Do you have a plan? – How recently updated?   |  |  |
| 2  | Projections of Housing needs for next 5 years?  |  |  |
| 3  | Are types of housing and locations specified?   |  |  |
| 4  | What needs to change in order to have sufficient density and are there zoning issues?   |  |  |
| 5  | Do your current ordinances set minimum building size stipulations?  |  |  |
| 6  | How are impact fees calculated? Do you provide waivers?   |  |  |
| 7  | Are allowances made to encourage different levels of rehabilitation for existing properties?  |  |  |
| 8  | Are allowances made for the use of manufactured housing?  |  |  |
| 9  | How recent has a review of regulatory barriers been done?   |  |  |
| 10 | Do you provide allowances for the modification of infrastructure standards?   |  |  |
| 11 | Have you adopted an expedited application and approval process for developments that provide moderate income housing?                           |  |  |
| 12 | Have you adopted a time limit for the review and approval of moderate or Workforce housing? Does it include a penalty for exceeding that limit? |  |  |
| 13 | Have modified parking requirements been adopted?  |  |  |
| 14 | Have special public hearing requirements been adopted?  |  |  |



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# Planning Processes

➤ Evaluation of current conditions and trends; p.18

- Demographics
- Housing needs
- Economic Development projections

➤ Regulatory Conditions

➤ Regional Planning Coordination



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# Planning Outline

- Needs Statement and “Moderate Income Housing Goal Statement”
- Description of community involvement in plan development
- Identification of benchmarks based on “outcome-based planning”
- Project-based priorities and timelines
- What resources will be utilized to fulfill the plan
- Housing needs summary with housing types listed by priority
- Location analysis: where priority housing should be built
- Timeline for housing development: what should be built annually
- Process for finding a development partner
- Project feasibility and pro-forma preparation
- Project financing options and application preparation
- Specific tasks, assignments and milestones
- Adopt your implementation plan as a separate ordinance

p. 19



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# UWHI Case Analysis Activity

- **Objective:** To participate in the review of a potential community development workforce housing project and bring back recommendations to share with the group (see handout)
- **Process:** Break into teams, review the study, document your answers to the questions and appoint one spokesperson each to report back to the group (45 minutes discussion; 30 minutes reports)

*Special Thanks to the  
Rural Community Assistance Council "RCAC"  
for the model case analysis activity*



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