

# NONPROFIT HOUSING ROUNDTABLE OF CENTRAL FLORIDA

With Support from the Orlando Realtor Association

Thursday, June 21, 2018 @ 10:30AM-12:00PM

[www.housingroundtable.org](http://www.housingroundtable.org)

## NOTE MEETING LOCATION CHANGE

Greater Orlando Builders Association located at 1953 Clayton Heritage Way, Maitland, FL 32751 (407-629-9242)

### Agenda Item (Note Meeting Location Change)

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#### 1. List of invitees and introductions

2. Speakers – Mitchell Glasser, Director of Orange County Housing/Community Development Division and Owen Beitsch PhD, GAI Consultants will be present to discuss the purpose/findings Central Florida Housing Summit and subsequent three workshops, which are described below.

Next meeting – 1st Quarter of 2019

Adjourn

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### Regional Affordable Housing Summit

Orange County Mayor Teresa Jacobs hosted the inaugural Regional Affordable Housing Summit on October 2017. Planners, developers and local government leaders from across the region gathered to explore affordable housing solutions for Central Florida, including strategies, tools and best practices being implemented throughout Florida and across the country. The goal of the summit was to utilize the community's collective experience and knowledge to create a regional approach to address affordable housing needs.

The Regional Affordable Housing Summit was one of the first steps toward finding affordable housing options for the region's growing population. To increase the production and availability of affordable housing, subsequent implementation workshops explored housing issues in greater detail. The following is the a list of the three workshops that have taken place in 2017/2018.

#### Workshop #1 – Identify Suitable Areas for Affordable Housing In Central Florida

This workshop helped identify and explore affordable housing solutions in Central Florida. Potential locations were discussed based on indicators such as proximity to public transportation, major employment centers and availability of community resources and services. A housing analysis and areas of opportunity were presented and identified for the region.

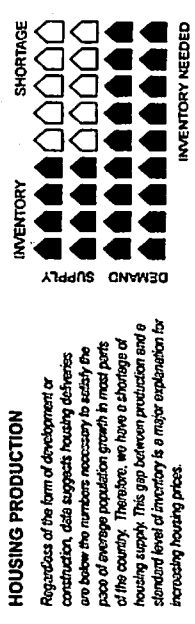
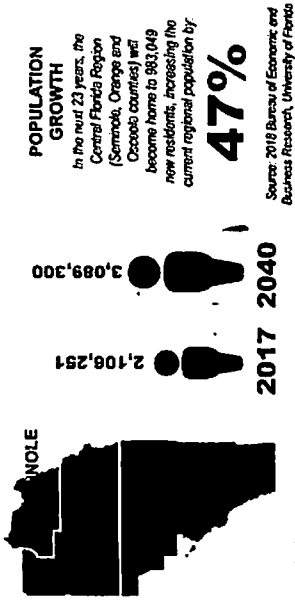
#### Workshop #2 – Affordable Housing Design and Product Types

This workshop engaged attendees and representatives of the development community, by discussing new housing types and strategies that are context-sensitive and which meet the needs of targeted populations and necessary income thresholds. The housing strategies and associated regulatory requirements discussed included mixed-use/mixed-income multi-family, adaptive reuse, smaller footprint single-family houses, accessory dwelling units, innovative senior housing, and co-housing communities, among others. Additionally, Florida developers were featured, sharing some of their best affordable housing products.

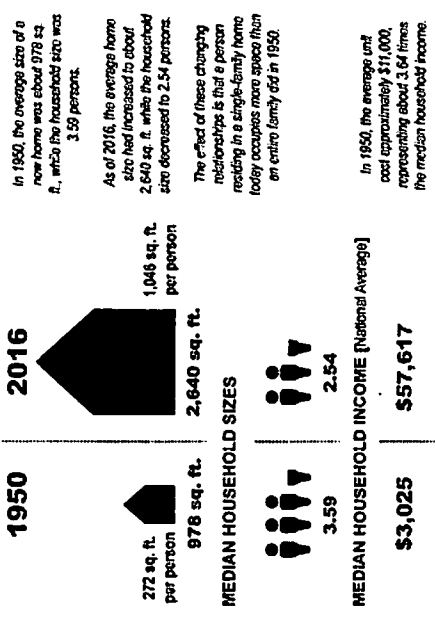
#### Workshop 3 – Regulatory/Financial Strategies for Increasing Affordable Housing Supply

The final workshop built upon discussions from prior sessions and focused on identifying regulatory and financial mechanisms that support production of affordable housing. The discussion on regulatory mechanisms covered strategies such as inclusive community requirements, density bonuses, linkage fees, site and building requirements, community land trusts, and transit-oriented development (TOD) options. Partners from Orange, Seminole, and Osceola County, and the City of Orlando presented a set of regional goals, strategies, and tools geared towards addressing the housing needs in the Central Florida region.

# REGIONAL HOUSING NEEDS



**NATIONAL TRENDS**  
AVERAGE HOME SIZES (New Construction)



# WORKSHOP #3 AGENDA

Regulatory and Financial Strategies for Increasing Affordable Housing Supply

## MORNING SESSION (9 a.m. to 11:40 a.m.)

- Moderated by Paul Owens, Orlando Sentinel Opinions Editor  
Registration and Networking
- Welcome - City of Winter Park, Mayor Steve Leary
- Opening Remarks - Orange County Mayor Teresa Jacobs
- Background of the Initiative - Alberto Vargas, Orange County Government  
The State of Housing in the Region
  - Orange County - Alberto Vargas, Planning Division
- City of Orlando - Oren J. Henry, Housing and Community Development Department
- Seminole County - Donna King, Community Development Division
- Osceola County - Susan Caswell, Community Development Department
- Regulatory Strategies for Affordable Housing: Best Practices - Judi Barrett, Barrett Planning Group  
Using Community Land Trusts to Preserve Affordability - Janice Ross, Florida Housing Coalition

## LUNCH & NETWORKING (11:40 a.m. to 12:20 p.m.)

## AFTERNOON SESSION (12:20 p.m. to 3 p.m.)

- Moderated by Paul Owens, Orlando Sentinel Opinions Editor  
Regional Affordable Housing Framework: Goals, Strategies, and Tools  
Q&A Session  
Panel Presentations, Discussion and Q&A Sessions
- 1. THE FINANCING & ECONOMICS OF AFFORDABLE HOUSING  
Owen Beibach, Community Solutions Group at GAI [PANEL MODERATOR & PRESENTER]  
Sandy Hostetter, Valley National Bank, Central Florida  
Steve Auger, Birdsong Housing Partners  
Stan Geberer, Fishkind & Associates
- 2. THE DEVELOPER'S PERSPECTIVE ON BUILDING AFFORDABLE HOUSING  
Craig Ustler, Ustler Development [PANEL MODERATOR & PRESENTER]  
Bob Anley, Orlando Neighborhood Improvement Corporation  
Scott Culp, Atlantic Housing Partners  
Mark Ogier, ContraVest Development Company  
Alex Martin, Mettamy Homes
- Closing Remarks - Mitchell Glasser, Orange County Government

## REGIONAL PARTNERS

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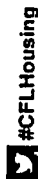


# REGIONAL AFFORDABLE HOUSING WORKSHOP

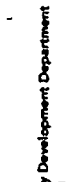
## WORKSHOP #3

Regulatory and Financial Strategies for Increasing Affordable Housing Supply

Wednesday, April 11, 2018  
Winter Park Community Center

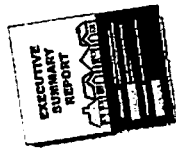
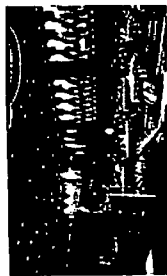


www.ocfl.net/affordablehousing



# THE REGIONAL INITIATIVE

Orange County Mayor Teresa Jacobs convened partners from Orange, Seminole and Osceola counties and the City of Orlando to engage in a "Regional Affordable Housing Initiative" to address the housing needs of Central Florida and its growing population. To start the conversation with the community at large, a Regional Affordable Housing Summit was held in October of 2016. A series of subsequent workshops have been held to explore mechanisms of increasing the production and availability of affordable housing in the region.



## SUMMIT - October 20, 2016

The summit was one of the first steps in discussing affordable housing solutions for Central Florida. Planners, housing experts, developers, local government officials and community leaders representing the region gathered to discuss strategies, tools and best practices being implemented throughout Florida and across the country.

## WORKSHOP 1 - May 19, 2017 Identifying Areas for Affordable Housing in Central Florida

The first workshop in the series helped identify and explore potential locations for future affordable housing development within the region. Identifying locations was based on indicators such as proximity to public transportation and major employment centers, and availability of community resources and services. A housing analysis was presented, with areas of access and opportunity identified on a regional scale.

## WORKSHOP 2 - October 18, 2017 Affordable Housing Design and Product Types

The second workshop engaged attendees and representatives of the development community by discussing innovative housing types and strategies which are cost-sensitive and meet the needs of targeted populations and income thresholds. Topics discussed included mixed-use and mixed-income developments, adaptive reuse, smaller-footprint homes, accessory dwelling units and co-housing, among others. Additionally, Florida developers and architects were featured, sharing some of their best affordable housing products.

## WORKSHOP 3 - April 11, 2018 Regulatory and Financial Strategies for Increasing Affordable Housing Supply

Today's workshop will build upon discussions from prior sessions, and it will focus on identifying regulatory and financial mechanisms that support production and preservation of affordable housing. Partners from Orange, Seminole and Osceola counties, and the City of Orlando will present a set of regional goals, strategies and tools geared toward addressing the housing needs of the region. The afternoon session will consist of panel discussions focusing on financial issues and major challenges that developers face in the affordable housing realm.

## EXECUTIVE SUMMARY REPORT May 18, 2018

# REGIONAL AFFORDABLE HOUSING FRAMEWORK

**A MISSION** Establish a regional framework for addressing housing needs and opportunities in Central Florida

## B GOALS

**1 DIVERSIFY**  
Encourage diversity of housing types and energy-efficient housing.

**2 PRESERVE**  
Preserve all existing affordable housing stock, including financially assisted and rent-restricted units.

**3 INTEGRATE**  
Promote social and economic integration throughout the region.

**4 EDUCATE**  
Improve financial literacy and education of future home renters and buyers.

## C STRATEGIES

- Review and modify development regulations to support a broad range of housing types.
- Promote adaptive reuse of existing residential structures.
- Encourage mixed-income housing through new regulations and creative funding mechanisms.
- Facilitate partnerships with nonprofit and public agencies, and private industry.
- Identify potential sites for affordable housing in Areas of Access and Opportunity.
- Promote State housing legislation that supports affordable housing efforts.

- Explore financing mechanisms and development concepts that support "Missing Middle" and mixed-income development.
- Encourage various types of live-work units as an affordable solution.
- Increase the availability of development sites by establishing or expanding mixed use zoning districts.
- Promote green building and infrastructure standards and techniques that improve energy and water efficiency.

- Encourage rehabilitation of existing residential buildings.
- Identify properties with existing affordability covenants and prioritize preservation efforts within Areas of Access and Opportunity.
- Build the capacity of nonprofit housing developers to acquire and preserve at-risk properties.
- Develop incentives for owners of financially assisted and rent-restricted units to extend their affordability contracts.
- Establish regional and local gap financing sources for preservation transactions.

- Promote mixed-income communities through integration of affordable housing throughout the region.
- Encourage affordable housing near employment centers, transit and essential community services.
- Support mixed-use, walkable neighborhoods connected by transit.
- Expand entrepreneurship opportunities by encouraging greater emphasis on small-scale and "Missing Middle" housing investments and training.

- Establish a comprehensive marketing plan to increase awareness of housing affordability resources.
- Establish a campaign that educates the community on factors that affect housing affordability.
- Expand pre-purchase education and training to include one-on-one home ownership counseling.
- Partner with higher education institutions, hospitals, and employers to support investments in workforce education and training.

## D TOOLS

### REGULATORY TOOLS

- REGULATORY ALTERNATIVES**
- Modification of Existing Standards to Reduce Barriers
  - Review Existing Land Inventory for Potential Affordable Housing Sites
  - Reduce Accessory Dwelling Unit (ADU) Requirements
  - Access & Opportunity Model
  - Inclusionary Housing Program
  - Reduce/Eliminate Minimum Living Area Requirements
  - Pilot Projects
  - Linkages Fees
  - FINANCIAL & DEVELOPMENT INCENTIVES
  - Expedited Permitting
  - Density/Intensity Bonus
  - Flexible Lot Configurations (i.e. setbacks, open space, etc.)
  - Reduce Parking Requirements
  - Impact Fee Reduction/Subsidy
  - Increase/Eliminate Household Occupancy Limits
  - Adaptive Reuse (Land Use Flexibility)

### FUNDING SOURCES

- REGULATORY ALTERNATIVES**
- Housing Trust Fund
  - Land Banking Through Community Land Trusts
  - Multi-Family Bonds with 4% and/or 9% Tax Credits
  - PARTNERSHIP OPPORTUNITIES
  - Public-Private Partnerships
  - Public Partnerships
  - Public-Nonprofit Partnerships
  - Community Land Trust (CLT)
  - Regional Revolving Loan Pool (SHIP Funds)
  - Partnerships with Higher Education Institutions/Hospitals/Employers
  - Build Advocacy Network/Engage with State Policymakers
  - ADDITIONAL RESOURCES
  - Shimborg Center's Assisted Housing Inventory
  - Incremental Development Alliance
  - Mixed-Income Housing Funding Mechanisms (U.S. Department of Housing & Urban Development)

### SHORT TERM [1-2 Years]

### LONG TERM [5-10 Years]