



*Delivering Results for
Housing that's Affordable*

Florida Housing Coalition

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RE: Affordable Housing Implementation Plan

DATE: January 7, 2021

Ms. Tasca:

The Florida Housing Coalition (the Coalition) is pleased to submit its response to the City of Port St. Lucie for an Affordable Housing Implementation Plan. The Coalition has a proven track record of helping local governments meet their affordable housing goals supported by data and public feedback.

The Coalition is recognized as Florida's foremost authority on affordable housing and technical assistance and is highly respected in the housing and community development field. We have deep experience completing the deliverables requested and have a long and successful history of partnering with local governments to develop effective, meaningful, and evidence-based planning documents.

The Coalition is excited for the opportunity to provide consulting services for this initiative and believes the City will find that we are uniquely qualified to serve as a trusted partner. For questions specific to this proposal, please do not hesitate to contact Carter Burton, Director of Housing & Community Development, at (407) 864-5424. We look forward to exceeding your expectations on this project.

Sincerely,



Jaimie Ross, President & CEO
Florida Housing Coalition

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1. Executive Summary

1.1 Introduction

The Florida Housing Coalition (the Coalition) is a nonprofit, statewide organization whose mission is to bring together housing advocates and resources so that all Floridians have a quality affordable home and suitable living environment. The administrative office of the Coalition is located in Tallahassee, FL with nine offices located throughout the state.

The Coalition provides information, training and technical assistance on affordable housing and related issues; supports community-based partnerships in leveraging resources; and advocates for policies, programs and use of funding resources that maximize the availability and improve the quality of affordable housing in Florida.

1.2 Background

The Florida Housing Coalition is acknowledged as Florida's foremost authority on affordable housing and community development, as a clearinghouse for information and as a provider of training and technical assistance. Relevant affordable housing information is also provided to housing professionals through the publication of the *Housing News Network* Journal, which is published three times per year in print and online format. The Journal contains articles on state and federal housing policy, program implementation and best practices. It is widely recognized as a valuable training tool, complementing our on-site, webinar and classroom training.

The Coalition maintains the website www.flhousing.org that includes essential reference information for housing professionals, useful tools and current information on housing and community development topics.

The Coalition's Annual Conference is attended by over 900 housing professionals from across the state. Our annual conference is among the largest affordable housing conferences in the country and provides training and information sharing among Florida's housing program administrators, community development, and social service professionals, with workshops that address best practices for implementation of Fair Housing, CDBG, HOME, and a variety of federal and state housing programs. The Conference fosters partnerships among homeless service and affordable housing providers by offering a Caucus for Continuum of Care Lead Agencies, CoC members, and their partners, as well as a workshop track specifically on ending homelessness. The Department of Economic Opportunity recently awarded the Florida Housing Coalition the

state contract to provide training and technical assistance to all of Florida's Continuum of Care Agencies.

1.3 Florida Housing Coalition Staff and Structure

The Coalition is commonly recognized as Florida's foremost authority on affordable housing training and technical assistance. We have served as Florida's affordable housing training and technical assistance provider through the Catalyst program and the Predevelopment Loan Program for approximately twenty years. The Coalition has provided training or technical assistance to local government staff in every jurisdiction that receives State Housing Initiatives Partnership (SHIP) funds (67 counties and 52 cities) to enhance housing programs that serve local communities.

The Coalition provides consulting services nationwide for grantees of HUD Department of Community Planning and Development (CPD) programs including the Community Development Block Grant (CDBG), CDBG Disaster Recovery (CDBG-DR), HOME Investment Partnerships Program (HOME), Emergency Solutions Grant (ESG), Housing Opportunities for Persons with AIDS (HOPWA), Continuum of Care (CoC) program, and the Neighborhood Stabilization Program (NSP).

The Coalition has earned its reputation nationally with HUD as well as national technical assistance providers. We are the sole subcontractor for the National Association for Latino Community Asset Builders (NALCAB) in Florida. Additionally, the Coalition is a subcontractor for Training and Development Associates (TDA) to provide technical assistance on NSP, the Disaster Recovery Grant Reporting (DRGR) system, and other HUD programs.

We have a team consisting of fourteen full time professional consultants on staff and the support of five full time administrators. Our team of consultants consists of highly skilled and geographically dispersed network of professional staff providing technical assistance in all areas of affordable housing and community development planning, finance, and development. Our professional technical assistance team also includes the expertise of our 25-member Board of Directors.

2. Qualifications and Experience

As the foremost training and technical assistance provider on affordable housing and related issues, the Consultant Team has a combined total of over 50 years of experience providing in-person workshops, clinics, and webinars. As the sole technical assistance provider for the SHIP program the Coalition provides trainings comprised of workshops, clinics, regional seminars, stakeholder events, webinars and on-site technical assistance.

The Coalition has established relationships with all key players in the affordable housing field in the state of Florida and nationwide and also contracts with local governments and non-profit organization to provide one-day trainings in areas including IDIS, DRGR, environmental review and compliance, homelessness issues, income determination, program monitoring, construction and rehabilitation management, fair housing compliance, and Section 3.

Our staff is frequently called upon to assist local government housing agencies with improving their overall performance by designing or improving policies, procedures and tracking systems, streamlining processes, reconciling accounts and ensuring compliance with applicable state, federal and/or local regulations. Through our practical experience in assisting these communities, we have developed many best practices that enable local housing programs to operate at maximum efficiency and in full accordance with applicable regulations. We understand that these complex programs can encounter problems and we are committed to fully recovering the functionality and integrity of programs and demonstrating effective solutions.

The Coalition helps our local government partners to leverage their resources, apply the most effective strategies to meet local need, and improve the quality and availability of affordable housing in their jurisdiction. We are a mission driven organization; and when we are providing consulting services for local governments our mission is to help that local government achieve all its goals.

2.1 Applicable Experience

The Coalition has demonstrated experience in the following areas:

2.1.1 Affordable Housing Plans: The Coalition has authored several Affordable Housing Plans for local governments seeking recommendations for implementing affordable housing solutions. The Coalition conducts a comprehensive and detailed process to identify housing strategies including data analysis, community engagement, and a historical

overview of direct or implied housing discrimination. Affordable housing strategy recommendations are tailored specific to the community. The Coalition has recently produced Affordable Housing Plans for the City of Gainesville, Marion County, City of Sarasota, and City of Winter Haven.

2.1.2 Consolidated Plans: Coalition staff has completed nearly thirty Consolidated Plans. Recently, the Coalition completed Consolidated Planning contracts for the City of Cape Coral, Hillsborough County, Palm Beach Gardens, Pompano Beach, Seminole County, the City of Tallahassee, and Volusia County. The Coalition also completed Consolidated Plans for the City of Gainesville and City of Tampa in 2018, Cities of Miami Gardens and Port Orange in 2016 and Cities of West Palm Beach and Hialeah in 2015. Other examples of relevant work for local governments by consultant team members include Con Plans and Annual Action Plans in several other communities: Glendale, AZ; Delano, CA; Town of Jupiter, FL; Marion County, FL; North Miami, FL; Ocala, FL; Palm Beach County, FL; New Rochelle, NY; Troy, NY; Garland, TX, and Williamson County, TX. Coalition staff also completed two State Agency Consolidated Plans and four Annual Action Plans for the States of Arizona and New York.

2.1.3 Annual Action Plans: The Consultant Team has prepared numerous First Year Action Plans for contracts with a Consolidated Plan deliverable. In addition, the Coalition recently developed subsequent Action Plans during the Consolidated Planning period for the City of Gainesville, to include CDBG-CV funds. Subsequent Action Plans have also been developed for Collier County, FL; Town of Jupiter, FL; Ocala, FL; Troy, NY; the State of Arizona; and the State of New York. The Consultant Team identifies resources and develops goals and projects that are tied to the Strategic Plan in order to address affordable housing, special needs housing, non-housing community development needs, and homelessness.

2.1.4 Analyses of Impediments: Coalition staff has prepared over twenty HUD approved Analysis of Impediments to Fair Housing Choice for local governments across the country. Most recently the Coalition developed Analyses of Impediments for Pompano Beach, the City of Tallahassee, and Seminole County. Analysis of Impediments were also developed for Glendale, AZ; Maricopa County, AZ; Mesa, AZ; Meriden, CT; Deltona, FL; Daytona Beach, FL; Gainesville, FL; Hialeah, FL; Hillsborough County, FL; Lake County, FL; Miami Gardens, FL; Tampa, FL; Schaumburg, IL; Saginaw, MI; Missoula, MT; Fremont, NE;

Goldsboro, NC; New Rochelle, NY; Troy, NY; Dallas, TX; and Garland, TX. Coalition staff also prepared two State level Analysis of Impediments for the State of Arizona and the State of New York.

2.1.5 Knowledge of HUD Rules, Regulations, and Policies: Our project team members routinely provide grant administration services on projects subject to applicable Federal, State and local regulations. Our extensive experience has built a skilled familiarity with CDBG, CDBG-DR, HOME, ESG, and HOPWA. This experience has been gained through exclusive positions, held by our team members, in various housing and community development organizations. Staff members have administered over 70 federal grants providing a vast knowledge of regulations, specifically 24 CFR Part 570, Part 91, and the Fair Housing Act. In addition, Coalition staff has been at the forefront providing technical assistance for the new CDBG-CV, HOME-ARP, and ESG-CV funds.

2.1.6 Diverse Stakeholder Consultations: Coalition staff always coordinates with the client to ensure maximum outreach to all relevant stakeholders. Consultation efforts are targeted to agencies, organizations, or groups including neighborhood associations, community development organizations, key departments in the grantee's jurisdiction, neighboring jurisdictions, housing providers, non-profit organizations representing underserved populations (low- and moderate-income persons, Non-English speaking persons, persons with disabilities, public housing residents, special needs population, and persons experiencing homelessness). To gather input on fair housing issues, the Coalition also targets fair housing organizations including nonprofit organizations that focus on fair housing problems, advocacy groups, banks and other financial institutions, as well as realtors. The Coalition also directly invites stakeholders to topic-oriented stakeholder sessions. Stakeholder interviews may also be conducted by telephone to reach more agencies.

2.1.7 Public Meetings: The preparation of Consolidated Plans and Analyses of Impediments require that grantees consult with stakeholders and gather feedback from residents during the preparation of the plans. The Coalition prides itself on its use of various outreach techniques beyond traditional methods. While the Coalition does adhere to each grantee's Citizen Participation Plan, the Consultant Team prefers to conduct at least two public meetings during the preparation of the plan in addition to the two required public hearings.

The meetings are advertised in newspapers of general circulation, on the grantee's website, through email announcements, on social media, and using local television.

2.1.8 Obstacles, Practices, and Issues that Impact Fair Housing: The Coalition has been making the connection between affordable housing and fair housing for many years. We offer training and technical assistance and publish reports on issues impacting the development of affordable housing, patterns of segregation, and land use tools for promoting mixed income housing. Our CEO, Jaimie Ross, has been publishing and training nationally on inclusionary housing policies for the past twenty years. Examples of our publications addressing issues that impact fair housing include our annual Home Matters for Florida reports, local Home Matters reports for four Florida communities, an annually updated guidebook on combatting Not In My Back Yard (NIMBY) resistance to affordable housing developments, and a compilation of Rural Capacity Building technical assistance provided for Collier County to advance affordable housing development in Immokalee.

2.1.9 Conducting Comprehensive Research: The Consultant Team specializes in conducting research utilizing primary and secondary sources of data. For both Consolidated Plans and Analysis of Impediments, the Coalition creates web-based surveys to gather input from residents and community stakeholders. The Coalition also collects data from various sources including HUD, U.S. Census Bureau, Federal Financial Institutions Examination Council (FFIEC), and local data through the Florida Housing Data Clearinghouse. The Coalition uses GIS and online mapping tools such as HUD CPD Maps to gather and present information about market conditions and demographics as well as to map community resources.

2.2 Consultant Team

Coalition staff is proficient in all areas related to fair and affordable housing, community development, neighborhood revitalization, and homelessness. The Coalition offers a full Consultant Team that will be lending their expertise to the completion of the Affordable Housing Implementation Plan. The following professional summaries indicate the Consultant Team for this project and demonstrate staff experience and capabilities in carrying out the services requested.

2.2.1 Professional Summaries of Consultant Team



JAIMIE ROSS is the President and CEO of the Florida Housing Coalition. Prior to joining the Florida Housing Coalition as CEO, Ms. Ross served as the Affordable Housing Director at 1000 Friends of Florida, a statewide nonprofit smart growth organization, from 1991- 2015. Prior to her tenure at 1000 Friends of Florida, Ross was a land use and real property lawyer representing for profit and nonprofit developers and financial institutions with a law firm in Orlando.

In 1991, Ross initiated the broad-based coalition that successfully advocated the passage of the William E. Sadowski Affordable Housing Act, providing a dedicated revenue source for affordable housing in Florida. She continues to facilitate the Sadowski Act Coalition to ensure funding for Florida’s state and local housing programs. Her work includes all forms of legislative and administrative advocacy and education related to the planning and financing of affordable housing. She has authored numerous articles on the planning and financing of affordable housing and smart growth tools for producing and preserving affordable housing. With funding from the Rockefeller Foundation, Ross produced “Creating Inclusive Communities”, a macro-media flash presentation on best practices for inclusionary housing programs. She founded the Florida Community Land Trust Institute in January, 2000.

Nationally, Ross serves on the Boards of Grounded Solutions Network and the Innovative Housing Institute. She is a nationally recognized expert in avoiding and overcoming the NIMBY syndrome. Ross is past Chair of the Affordable Housing Committee of the Real Property Probate & Trust Law Section of the Florida Bar, and a former Fannie Mae Foundation James A. Johnson Community Fellow.



ASHON NESBITT is Chief Programs Officer and Technical Advisor for the Florida Housing Coalition. Ashon leads the Florida Community Land Trust Institute, providing training and technical assistance to local governments, nonprofits, lenders, and other stakeholders for the creation and support of community land trusts statewide. Ashon also leads the Coalition’s nonprofit capacity building work, sharing knowledge and expertise in housing development. In addition, Ashon helps local governments with land use tools and creative models for affordable housing development and finance, such as adaptive reuse. Ashon has professional experience in local government program administration, tax credit finance, and rental development, as well as a master’s in Urban and Regional Planning

and Real Estate from the University of Florida, and a bachelor's in Architectural Studies from Florida A&M University



CARTER BURTON is the Director of Housing & Community Development at the Florida Housing Coalition, has 20 years of experience administering HUD Community Planning and Development (CPD) programs specifically the Community Development Block Grant (CDBG) and HOME Investment Partnership (HOME) Programs. Carter is a former CDBG Program Manager for the Arizona Department of Housing and former Grant Administrator for the State of New York Small Cities program where she administered nearly \$70 million in CDBG funds. Burton specializes in HUD consolidated planning and has developed numerous Consolidated Plans, Annual Action Plans, Analyses of Impediments to Fair Housing Choice, and Consolidated Annual Performance and Evaluation Reports for Entitlements throughout Arizona, California, Connecticut, Florida, Georgia, New York, and Texas. Prior to joining the Florida Housing Coalition Burton worked for two State agencies, then transitioned to consulting for HUD Entitlement Communities. Burton is a licensed Realtor in Florida and a member of the National Association of Realtors. Carter holds a master's degree in Social Sciences from Binghamton University.



BLAISE DENTON is the Research Manager for the Florida Housing Coalition. He has years of experience working with state and local government focusing on affordable housing, transportation-oriented development, historic preservation, and special populations issues. Prior to joining the Coalition, Blaise worked as a training and policy specialist at the Florida Department of Elder Affairs, where he designed E-Learning courses used to train hundreds of adult day care administrators, created budgeting systems to help manage over two million federal grant dollars, and provided planning and policy services. He has facilitated stakeholder meetings while researching transportation-oriented development and community safety issues in Tallahassee, Orlando, and nationally. Previously he has worked with the Florida Main Street Program, where he provided local communities with access to research, marketing, and ArcGIS services. Blaise specializes in ArcGIS, land use planning and practices, community stakeholder engagement, technical writing, and training services across the spectrum of the Coalition's work. Blaise holds a master's Degree in Urban and Regional Planning and a dual Bachelors in Literature and Religion from Florida State University.



KODY GLAZER is the Legal Director of the Florida Housing Coalition. He graduated Magna Cum Laude from the Florida State University College of Law and has experience with local and state governmental affairs, fair housing, land use, and environmental law. Prior to joining the Coalition, Kody clerked for the National Fair Housing Alliance in Washington D.C. where he gained valuable insight into federal funding mechanisms and discrimination laws that affect affordable housing and opportunity. Kody has also clerked for the Leon County Attorney's Office and Hopping Green & Sams P.A. where he specialized in land use and environmental law focusing on the land development process of various local governments and other processes that affect the makeup of the human environment. Kody was a member of the Florida State University Law Review, the Journal of Land Use & Environmental Law, and in 2019, was chosen to represent the FSU College of Law as an outstanding law student by the City, County, and Local Government Section of the Florida Bar.



RAYANNA RIECESS is a recent graduate of the Florida State University College of Law and received her bachelor's degree in English with a minor in Writing and Rhetoric at the University of Central Florida. While at FSU she worked at College of Law's Public Interest Law Center, most recently as volunteer with Legal Services of North Florida. Prior to that Rayanna served as a certified legal intern in FSU's College of Law inaugural COVID-19 Veterans Legal Clinic.

3. Scope of Work

3.1 STATEMENT OF OUR APPROACH

At the Coalition, we recognize the necessity of superior local government planning. In order to address a wide range of pressing issues facing communities across Florida, local jurisdictions must maximize their return on investment. It is only through effective planning and efficient deployment of resources that local governments can ensure all residents enjoy a rewarding, secure and productive future.

This belief in planning forms the core of our approach to every engagement. While we always meet basic Federal requirements, we also make sure the signature characteristics of superior planning – robust citizen and stakeholder input, identification of evidence-based needs, tracking of valid outcome measures – are brought to bear for all our clients.

The Coalition offers a depth of knowledge in the successful coordination and delivery of the products requested. We continue to broaden our outreach efforts to conduct meaningful needs assessment activities. We work to build on the strengths and collaborations already existing in the community to avoid duplication of services and reduce the cost associated with any proposed solutions.

3.2 METHODOLOGY / WORK PLAN

3.2.1 Kickoff Meeting

Shortly after the contract award, the Consultant Team will hold a kickoff meeting with representatives from the City. The purpose of this meeting will be to discuss contract terms and the Scope of Work, finalize schedules and deadlines, develop a consultation strategy, as well as to identify and gather existing plans, documents, and information on stakeholders that should be consulted for the Affordable Housing Plan.

3.2.2 Training on the Consolidated Plan / Analysis of Impediments as Data Tools

Coalition staff will provide one (1) training on how to effectively use the City's HUD Five-Year Consolidated Plan and most recent Analysis of Impediments as primary resources for gathering and analyzing data for any housing needs assessment or related planning document. The training will be 90 minutes in length and will include information on

navigating Consolidated Plan and AI data tables and narratives for identifying housing needs, how to identify areas of opportunity through mapping, and how to utilize public input as data.

3.2.3 Produce an Affordable Housing Implementation Plan

The Coalition will analyze data from local sources, primarily the City's HUD Five-Year Consolidated Plan and most recent Analysis of Impediments, to identify priority housing needs. The Coalition may utilize other readily available data resources for identifying housing needs, as necessary, including the City's Local Housing Assistance Plan (LHAP), Comprehensive Plan, CRA plans, and/or other local planning documents related to identifying barriers to affordable housing. The Coalition may also manipulate data at its discretion for the purposes of identifying housing needs.

The Affordable Housing Implementation Plan will succinctly identify barriers to affordable housing and the Coalition will work with the City to prioritize needs and provide 3-5 strategy recommendations to be implemented in addressing affordable housing issues. In determining strategy recommendations, the Coalition will consider: 1) unmet housing needs; 2) patterns of historical discrimination in housing; 3) housing activities/programs currently in place; 4) access to resources; and 5) local capacity for systemic change.

Each strategy will include:

- Step-by-step process for implementation.
- Suggested timeframes for execution.
- Resources needed to succeed.

Data will be presented in a visually appealing and user-friendly format that can be tailored and shared for public presentation. Data may be presented in graph, chart, map, or video format for easy interpretation. The City will own all supporting documentation relevant to producing the Affordable Housing Implementation Plan.

3.2.4 Implementation Trainings

Upon adoption of the Affordable Housing Implementation Plan, the Coalition will provide strategy implementation trainings to City staff, elected officials, AHAC members and other stakeholders. The series of trainings will consist of two (2) workshops per plan strategy. Each workshop will involve the Coalition detailing the step-by-step process for implementation. The workshops are intended to provide stakeholders with the tools necessary to ensure success of the Affordable Housing Implementation Plan.

Workshops will be 90 minutes in length and may be virtual or in-person at the Coalition's discretion. The Coalition will follow all CDC guidelines for gatherings and also comply with its internal COVID-19 policy.

4. Cost Proposal

4.1 FEE FOR SERVICES

Having conducted numerous Affordable Housing Implementation Plans and Housing Needs Assessments, Florida Housing Coalition is confident that we have developed a comprehensive and reasonable compensation schedule.

In an effort to provide a clear accounting of cost, we provide a total for key tasks. The Coalition proposes to carry out the project on a time and materials basis at a rate of \$150/hour. The amount proposed is pursuant to the scope of work stated in this response.

Prior to contract execution, the Coalition will work with the City to finalize the scope. Any changes determined to be outside of the proposed work plan included in this response, may be an additional cost.

All deliverables shall be provided remotely unless otherwise discussed and agreed upon by both parties. A schedule of milestones is to be determined upon contract execution.

Affordable Housing Implementation Plan		
TASKS	HOURS	COST
Training on Con Plan / AI as Data Tools	25	\$ 3,750
Affordable Housing Implementation Plan	285	\$ 42,750
I. Executive Summary	72	\$ 10,800
II. Housing Needs Analysis	118	\$ 17,700
III. Strategy Recommendations	95	\$ 14,250
Graphic Design	45	\$ 6,750
Implementation Trainings (up to 10 workshops)	110	\$ 16,500
Total Budget	465	\$ 69,750



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