



Final Recommendations to
Advance Affordable
Housing and Community
Retention

September 18, 2018



TASK FORCE VISION STATEMENT/ PREAMBLE

Background: HouseATL is a cross-sector group of civic leaders committed to building the political and community will for a comprehensive and coordinated housing affordability action plan in the City of Atlanta. HouseATL is an open taskforce - initiated through the convening power and resources of ULI Atlanta, The Arthur M. Blank Family Foundation, Central Atlanta Progress, Center for Civic Innovation, and Metro Atlanta Chamber of Commerce. These partners engaged more than 200 civic leaders in working toward actionable recommendations beginning in January 2018. We have defined the problems, identified the barriers to success, taken a data-driven approach, and engaged in thoughtful problem-solving so that civic and business leadership in the City of Atlanta will have a shared, comprehensive set of policies and adequate funding to address housing affordability.

Guiding Principles: Underpinning these recommendations are the following guiding principles

- Housing is a means to an end for a more sustainable, inclusive, healthy City of Atlanta. Recommendations should advance racial and socioeconomic equity in our communities.
- Cross-sector collaboration is critical to actionable solutions. We seek to engage civic and community leadership at all levels, recognizing that sustainable change only happens with authentic resident support.
- We recognize that there are many related issues (wage growth, quality schools, and transportation access, among others) that are inextricably linked to affordability and community retention and are supportive of these efforts that are outside of the scope of this particular taskforce.
- We believe housing strategies should be incorporated across the city of Atlanta, balancing opportunities in neighborhoods with high quality of life factors with comprehensive community development.
- We are committed to serving all of the affordability needs of Atlantans, with an emphasis on those most in need.
- The city is part of a broad, regional Atlanta housing market. Regional planning with our neighbors, particularly around the link between regional transportation and housing affordability, must be part of our long-term affordability solutions.
- Strategies must harness the power of the marketplace – capital and development – to meaningfully increase housing production and preservation.
- We acknowledge that some recommendations may require policy alignment and/or state law change and there will be a need for ongoing advocacy and collaboration with various state agencies and legislative partners.



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HouseATL: Housing Affordability and Community Retention Taskforce

Who We Are: HouseATL is a cross-sector group of civic leaders committed to building the political and community will for a comprehensive and coordinated housing affordability action plan in the City of Atlanta. The effort was born out of a recognition that housing affordability was a central issue in the city elections and would undoubtedly be an area of focus for the new administration. Now – more than ever – a compelling and unified voice is needed to inform future policy and chart a path to a “One Atlanta.”

With over 100 representatives from the public, private, philanthropic and non-profit sectors, we believe that multidisciplinary collaboration is paramount in effectively addressing the critical need for housing affordability. The taskforce is open to anyone interested and willing to engage on the topic and we look forward to leveraging the collective expertise of all participants.

Our Vision: For civic leadership in the City of Atlanta to have a shared, comprehensive set of policies and adequate funding to address housing affordability.

How We Get There: Create an actionable plan with the urgency of now that seeks to leverage the tremendous work that has already been done and existing expertise ready to be tapped. The taskforce meets on a monthly basis, with a series of topical working groups meeting in the interim.

Our guiding principles:

- Housing is a means to an end for a more sustainable, inclusive, healthy City of Atlanta. Recommendations should advance racial and socioeconomic equity in our communities.
- Cross-sector collaboration is critical to actionable solutions. We seek to engage civic and community leadership at all levels, recognizing that sustainable change only happens with authentic resident support.
- We recognize that there are many related issues (wage growth, quality schools, and transportation access, among others) that are inextricably linked to affordability and community retention and are supportive of these efforts that are outside of the scope of this particular taskforce.
- We believe housing strategies should be incorporated across the city of Atlanta, balancing opportunities in neighborhoods with high quality of life factors with

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comprehensive community development. We are committed to serving all of the affordability needs of Atlantans, with an emphasis on those most in need.

- The city is part of a broad, regional Atlanta housing market. Regional planning with our neighbors, particularly around the link between regional transportation and housing affordability, must be part of our long-term affordability solutions.
- Strategies must harness the power of the marketplace – capital and development – to meaningfully increase housing production and preservation.
- We acknowledge that some recommendations may require policy alignment and/or state law change and there will be a need for ongoing advocacy and collaboration with various state agencies and legislative partners.

HouseATL Executive Committee:

- Leonard Adams, President & CEO, Quest Community Development Organization
- David Allman, Owner & Chairman, Regent Partners
- Kathleen Farrell, Commercial Real Estate Line of Business Executive, SunTrust Bank, Inc.
- Frank Fernandez, Vice President of Community Development, Blank Family Foundation
- Jim Grauley, President & Chief Operating Officer, Columbia Residential
- Terri Lee, Deputy Commissioner of City Planning, City of Atlanta
- Michael Lucas, Deputy Director, Atlanta Volunteer Lawyers Foundation (AVLF)
- Odetta MacLeish-White, Managing Director, TransFormation Alliance
- Cathryn Marchman, Executive Director, Partners for HOME
- William McFarland, Georgia ACT
- Brian McGowan, President & CEO, Atlanta BeltLine, Inc. (through August 2018)
- Trish O'Connell, Vice President, Real Estate Development, Atlanta Housing Authority
- AJ Robinson, President, Central Atlanta Progress
- Marjy Stagmeier, Founder, TriStar
- Tayani Suma, Vice President, Real Estate, Atlanta Neighborhood Development Partnership
- Tené Traylor, Fund Advisor, Kendeda Fund
- Janis Ware, SUMMECH CDC

HouseATL Working Groups: Under the broader taskforce umbrella, five topical working groups formed. The groups' work was guided by the following questions and members

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crafted actionable recommendations that roll up into HouseATL's larger strategy.

Community Retention	<ul style="list-style-type: none">•What are best practice solutions to ensure that existing homeowners, renters, and small businesses are not displaced?•What can we learn from local examples and other cities that can be applied throughout the city?
Existing Affordable Housing Preservation	<ul style="list-style-type: none">•Where is existing rental and for-sale housing stock that can be preserved?•How do we best maintain these homes as affordable while ensuring quality homes and strong neighborhood services?
Housing for Under 50% AMI	<ul style="list-style-type: none">•What existing resources and strategies can be scaled up to address these income groups?•What specific strategies address seniors on fixed incomes?•What about very low income households and those experiencing homelessness?
Public Resources for Production	<ul style="list-style-type: none">•How can we best use publicly owned land/ assets?•How can we best deploy <i>existing</i> public resources?•What could change in the regulatory environment to increase production?•What <i>new</i> public resources could and should the city pursue?
New Private Investment	<ul style="list-style-type: none">•What is the opportunity for social impact investing?•What is the role for philanthropy?•How do we remove barriers to harness the power of the private sector?

Templates for Recommendations from Working Groups:

Each working group was tasked with actionable recommendations in four categories:

- Key Funding Recommendation(s):
- Key Policy Recommendation(s):
- Key Communications Recommendation(s):
- Key Community Engagement Recommendation(s):

Each working group was asked to assess the recommendations relative to HouseATL's stated goals and values:

- Do these recommendations increase the current production/ results/ resources?
- How do these recommendations advance racial equity and inclusion in the City of Atlanta?
- How do these recommendations contribute to a more resilient and healthy Atlanta?

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- Have these recommendations been vetted by all key stakeholder groups (residents, public leadership, business community, non-profit and for-profit developers, philanthropy)?
- How do these recommendations connect to the goals of the other working groups?

Timeline of Taskforce:



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HOUSEATL FULL TASKFORCE – PROBLEM STATEMENT

Problem statement: Civic leadership in the City of Atlanta lacks a shared, comprehensive set of policies and adequate funding to address housing affordability.

What are the barriers/because?

1. It is a complicated subject matter, with a lack of knowledge and understanding.
2. There is a lack of community consensus and political will.
3. We lack flexible, robust local funding.
4. Efforts to address are not coordinated among various stakeholders.

As a result/outcomes:

1. We are among the worst cities in the US for economic mobility and income disparity.
2. Low income Atlantans lives are harder (health, education, housing stability, access).
3. We are losing the 'social mosaic' of the city.
4. We are at risk of losing our 'affordable' economic competitive advantage.
5. We have a flat or declining amount of affordable housing stock.
6. Residents are being displaced from the city.

Vision: Civic leadership in the City of Atlanta has a shared, comprehensive set of policies and adequate funding to address housing affordability.



Working Group Problem & Vision Statements



COMMUNITY RETENTION WORKING GROUP – PROBLEM STATEMENT

Problem statement: Low-and moderate-income residents, businesses, and institutions in the City of Atlanta’s predominantly black and brown neighborhoods experiencing significant investment, are not able to prosper in place once investments are made.

What are the barriers/because?

1. Structural and institutional racism discourage wealth building and resilience in communities of color.
2. Rising rent, property tax increases, and loss of affordable housing are forcing residents and businesses out of their generational and chosen locations.
3. The city is growing quickly without proactive strategies to protect legacy communities and guide new residents into the existing social structure of their chosen neighborhood.
4. There is a lack of collective political and societal action to value and invest in racial, economic, and cultural diversity.
5. There are not enough mission driven organizations with sufficient capacity and/or resources to focus on housing and community development in gentrifying neighborhoods.
6. The process of selling or financing public assets does not adequately incorporate community input.

As a result/outcomes:

1. Atlanta is losing its social fabric as predominantly black and brown residents are displaced and we lose social and cultural assets.
2. New residents enter a community without awareness of, or regard for, the history and ongoing relationships of the neighborhood, and are not educated or encouraged to create connections that will strengthen the social fabric.
 - a. This pattern of behavior encourages legacy residents to resist new investments as they have learned that change usually means their eventual displacement.
3. Low-and moderate-income residents do not reap the benefits of improved access to opportunity schools, mobility, jobs).
4. Naturally occurring affordable housing and standard housing is being lost and not being replaced by permanently affordable housing.

Vision Statement: Low and moderate-income residents, businesses, and institutions in City of Atlanta neighborhoods experiencing catalytic or transformative investment are able to thrive in place once investments are made.

NEW PRIVATE INVESTMENT – PROBLEM STATEMENT

Problem statement:

Users and providers of capital who are creating and preserving housing in the city of Atlanta do not have sufficient, lower priced capital to meet affordable housing needs¹.

What are the barriers/because?

- 1) Existing private capital accepting below market, risk-adjusted returns for housing has been limited.
- 2) Social impact investment pool for housing and real estate is limited.
- 3) Local philanthropy has not had a workable template to engage and prioritize affordable housing.
 - a. No shared or trusted mechanism for coordinated investment
 - b. There is a timeline mismatch (3-5-year horizon on a 50-year problem)
 - c. We lack a coordinated and tracked visible pipeline of housing opportunities for investment
 - d. The case has not been made that quality, affordable housing is tied to and a means to other shared goals (health, education, economic mobility)
- 4) There is constrained capacity and lack of understanding to utilize existing capital available for affordable housing.
 - a. Existing resources for affordable housing move very slowly compared to purely private market deals
 - b. Existing private capital isn't matching up with the financing gap needs of current pipeline
 - c. Friction in current structure or no structured dollars
 - d. Complexity of capital structure of affordable housing – private capital doesn't understand
- 5) There is a lack of understanding and a shared perspective on how to address housing affordability across income bands (i.e. very low income to workforce).
- 6) There is no coordinated system or vehicle for private resources to leverage public dollars to create affordable housing.
- 7) Higher down-payment and credit standards as a result of the financial collapse limit affordable homebuying opportunities.

As a result:

- 1) Affordable housing production is flat or declining.
- 2) Atlantans are spending a higher percentage of their income on housing.
- 3) Corporate expansions/relocations raise concerns about diversity of housing stock.
- 4) Low and moderate-income residents have fewer and often inferior options.



- 5) New housing stock is largely serving the high-end of the market.
- 6) Existing affordable housing stock is getting 'upgraded' resulting in loss of affordable rents.
- 7) Private investment's ability to produce workforce housing is waning – jeopardizing Atlanta's economic competitiveness.
- 8) Affordable housing owners (naturally occurring and/or subsidized) are raising rents because they can or because there are no alternatives to proper debt service coverage.
- 9) Realizing wealth through homeownership is a challenge for our low to moderate income Atlantans.
- 10) National philanthropy is challenged supporting local projects or larger funding platforms in Atlanta given the limited affordable housing support/priority of local philanthropy.

Vision statement:

Users and providers of capital who are creating and preserving housing in the city of Atlanta have sufficient, lower priced capital to meet affordable housing needs.

¹ Affordable housing need is estimated to be ~3,000 new and preserved homes annually over the next 10 years. NOTE: We could use the number estimate from the BAG/ ULI study (30% of \$240 million annually) but would want to account for the fact that it does not address under 50% AMI. There is an argument to be made for this in that private resources can address 60% AMI and above and below that threshold is really about public subsidy.



PRESERVATION STRATEGIES WORKING GROUP – PROBLEM STATEMENT

Problem statement:

Residents, both owners and renters, find that existing affordable housing stock is rapidly declining due to both physical deterioration and obsolescence, and renovation and redevelopment and rent increases¹. Preservation tools to address this crisis are severely limited and not aligned.

What are the barriers/because?

- 1) Market forces are driving up prices and diminishing affordable supply overall.
 - a. Speculation works against affordability: when programs or incentives get announced (Westside, Turner Field) there is a frenzy to invest in the associated/adjacent land, which drives up prices.
 - b. Market activity is biased toward high end new construction
 - c. Class C stock is limited and in high demand for purchase, light rehab, and rent increases.
 - d. Competitive bidding process (high non-refundable Earnest Money deposits, short inspection periods) is a barrier to affordable housing driven buyers.

- 2) Regulatory environment can make preservation of existing stock more challenging and does not currently require permanent affordability.
 - a. Redundancy and lack of coordination across public agencies - each public agency operates separate funding processes, each with their own compliance requirements, creating inefficiencies and costs.
 - b. Cost of compliance² – the cost to comply with regulations must be accounted for
 - c. Existing property tax policies give limited opportunity to achieve benefits or enticements of owning and preserving affordable housing. (i.e. Minimal property tax discounts exist to retain affordability)
 - d. Mechanisms do not currently exist to require or incent owners of derelict properties to improve properties or dispose of them to the city or county.

¹ Atlanta is losing affordable housing:

- from 2005 to 2017, metro Atlanta lost 14% of its 1 and 2-star stock¹, or almost 14,000 units of Naturally Occurring Affordable Housing;
- from 2010 to 2014, Atlanta lost 5309 units renting below \$750, or 16% of the total affordable units at those rents.
- By 2020, subsidies will expire on almost 8,000 units in the City of Atlanta.
- 39 properties¹ have exited the LIHTC program after only 15 years of affordability in the last five years, with seven submitting for the QC process year to date.

² For example, ADA requirements for an older non-compliant building.

- e. Current zoning can create barriers to rehab/preservation, in the event existing uses do not comply.
 - f. Current subsidy sources do not require long-term(20 year) or permanent affordability, thus meaning new public investment will be required to maintain affordability in already subsidized properties.
- 3) Funding is inadequate to meet need.
- a. The need is not widely understood in terms of annual multifamily and single-family homes requiring preservation
 - b. The cost of conventional financing is often too high for affordable housing preservation; below market debt and equity is needed
 - c. Lower cost debt at higher LTV isn't widely available
 - d. Impact investing, which would offer below market returns or grant dollars, is not yet at scale in Atlanta– equity or debt (philanthropic, corporate, individual investors)
 - e. Existing LIHTC/ HUD subsidies are expiring / Ability to exit tax credit program after 15 years
 - f. Lack of rapid response funding to enable quick acquisition in a heated market
- 4) Residents often oppose older housing stock because they view it as a community blight as opposed to a valuable asset needing protection and reinvestment, and the most cost-effective way to meet quality affordable housing goals.

As a result:

- Individuals moving out of the city to a cheaper market increases commute time, adds to traffic, and lost productivity.
- Inability to pay rent leads to transiency (move outs and evictions) which has a major impact on schools and educational attainment.
- We are rapidly losing our low-wage workforce because they cannot afford to live in the city—rents are increasing at a rate higher than incomes.
- This is creating concentrations of poverty – often in suburban areas.
- There are other negative impacts on schools, health and air quality, inequality, and homelessness.
- A loss of social fabric, vibrant communities, and diversity in neighborhoods.

Vision statement:

Preservation tools to address this crisis are abundant and flexible, and thus residents, both owners and renters, find that existing affordable housing stock is available and preserved as affordable long-term.



PUBLIC INVESTMENT WORKING GROUP – PROBLEM STATEMENT

Problem Statement: Public sector agencies¹ influencing housing in the city of Atlanta lack sufficient and sustainable resources, coordinated leadership, and a shared vision for coordinating resources (i.e., land, regulatory reforms, and revenue) to execute on the continuum of affordable housing need².

Barriers:

1. There is no institutional or transparent understanding of the capital investment framework for public resources we currently have for housing.
2. We lack a dedicated, flexible, and local revenue source that will be replenished annually to support the production and preservation of affordable housing.
3. Current funding and resource allocations don't align to an overarching vision and strategic plan.
 - a. Criteria for distributing public money dictates what agencies can/cannot do.
 - b. No long-term strategy shared across all agencies informs funding.
 - c. No geographic focus that aligns investment with need or existing infrastructure (transit, schools, greenspace).
4. No cross-agency leadership (i.e. cabinet level position) that coordinates the allocation of resources and monitors and communicates investments in a transparent way.
 - a. Closer coordination with state at a policy level to set the framework for long-term benefits (i.e. tying housing into existing infrastructure investments like transit).
 - b. Public agency charters have no clear set of roles and responsibilities. No one charged with balancing impediments in regulations between agencies with funding limitations.
5. Complex regulatory environment constrains ability to produce affordable housing.
6. With the exception of MARTA and the Atlanta Housing Authority, agencies have little adequately assembled and developable land for affordable housing.
7. limited number of viable affordable housing developers/capacity, particularly non-profit developers/CDCs.
8. The public at large does not understand who needs affordable housing, why it is critical for economic development, and lacks a common vocabulary to discuss affordable housing policy and funding proposals.

¹ Including but not limited to the State of GA, City of Atlanta, APS, AHA, Invest Atlanta, ABI, Land Bank Authority, MARTA, the new ATL, Fulton Co. Tax Commissioner and HUD. City controlled agencies are participants in a shared strategic plan and leadership structure for affordable housing. A wider group are agencies and public institutions or corporations that might have surplus land that could be used for affordable housing, including Board of Regents or Ga Power.

² Affordable housing need is estimated to be ~3,000 new and preserved homes annually over the next 10 years, according to the ULI/Bleakly study.



As a result:

1. Inadequate and declining stock of existing affordable inventory, and inadequate production levels for both multifamily rental and single-family homeowner.
2. No geographically balanced housing strategy.
3. Constrained ability to draw in a broader field of private developers or capital or to redeploy existing resources like surplus land.
4. There is no baseline inventory of resources and investments across agencies.
5. No widely known database for families and individuals to use that identifies where affordable units are located, especially in higher wealth neighborhoods.

Vision Statement: Public sector agencies¹ in the City of Atlanta have sufficient resources and a shared vision, leadership, and set of coordinated resources (including land, policy and revenue) to execute on the continuum of affordable housing needs².



UNDER 50% AMI WORKING GROUP – PROBLEM STATEMENT

Problem Statement: Families and individuals with less than half of the region’s median income (40% of households¹) in the City of Atlanta do not have access to sufficient housing options and are increasingly vulnerable to eviction, displacement, and homelessness.

Because:

1. The market is not delivering the number of units/year needed to keep pace with City of Atlanta population growth, which acutely impacts City’s poorest.
 - a. Land and construction prices in the City are rapidly increasing
 - b. Challenges of managing market dynamics of our city (e.g. decreasing supply, upscaling & loss of NOAH)
2. Existing equity and debt funding mechanisms, including subsidies, are limited, inflexible, and cumbersome.
 - a. Misalignment of incentives between property owners and tenants
 - b. Complicated funding matrix creates a barrier to entry – for profit / market rate developers are absent from discussion
 - c. No dedicated municipal funding
 - d. Not enough funding – at all levels (federal, state and local).
 - i. Significant subsidy required in a typical deal at this income level
 - e. The funding that is available is not streamlined and does not “play well” with others.
 - f. Alternative capital solutions are not yet to scale in Atlanta (both debt and equity, e.g. impact investing) (being addressed in private investment)
 - g. There are limited funding solutions that prioritize families/individual making less than 50% of the region’s median income
3. There is a lack of political will to overcome de facto (i.e. NIMBY concerns) and de jure (i.e. zoning and policy roadblocks) issues that prevent new supply.
 - a. Overlay zoning and code restrictions (i.e. supportive housing ordinances)
 - b. NIMBY / political and community will
4. Mission-aligned housing developers, with the mission and expertise to serve this population, do not have the resources to scale up to meet the need.
 - a. Resources include, but not limited to, funding, capacity, and political support

¹ “Affordable Atlanta” Bleakly Advisory Group, 2018.



5. There is a lack of robust services, accessible employment, and adequate community infrastructure connected to continuum of housing serving this affordability level.
 - a. Lack of bridge /supportive services for people with disabling conditions
 - b. Lack of community infrastructure (Education, Transportation, Medical, and Utility)
 - c. Limited political appetite for Medicaid expansion, which would provide revenue for supportive services
 - d. Limited opportunity for economic mobility among families and individuals making less than 50% of the region's median income

As a Result

1. Homelessness and/or transiency rates increase, creating greater poverty and often a multigenerational poverty cycle.
2. Families and individuals settle for substandard housing or double, and even triple up in residences.
3. Residents are increasingly disconnected from robust wrap-around services.
4. City of Atlanta and its and community institutions (hospitals, schools, etc.) take on significant costs to address adverse outcomes.
5. Not enough housing developers are motivated to build for this market, which has the additional impact of stifling new opportunities for innovation.
6. Families and individuals are displaced from their community and exacerbate their cost burdens (transportation costs, un/under employment costs), which in turn causes neighborhoods to become increasingly less socio-economically diverse.

Vision Statement: Families and individuals with less than half of the region's median income in the City of Atlanta (40% of all households) have greater access to sufficient housing options and are less vulnerable to eviction, displacement, and homelessness.



Recommendations

Summary of Recommendations



Investing in an Affordable Atlanta

\$1 billion of local, flexible resources that enable 20,000+ new and preserved homes over the next 8 – 10 years affordable to those earning 0 – 120% of metro Atlanta area’s median income (AMI).

\$500M in Public Resources:

- (1) Create policy to prioritize underutilized and surplus publicly owned assets (land and buildings) for community development, yielding 300 – 500 affordable homes annually.
- (2) Issue a new \$250 million bond for housing.
- (3) Allocate existing public funding, \$10 - \$30 million annually.
- (4) Establish new, dedicated, funding source for housing yielding \$5 - \$15 million annually. Public funds should prioritize area of greatest need, below 50% AMI and supportive housing.

\$500M in Private Resources:

- (1) Invest \$20 - \$50 million annually from new social impact funds, philanthropy & other private capital.
- (2) Secure \$50 - \$75 million in funding for affordable single-family preservation through New Markets Tax Credits.
- (3) Facilitate 250 - 350 new affordable homes annually through regulatory reform. Changes will ensure innovative housing solutions are zoning and code compliant, create cost savings, and boost production.



Prioritizing Community: Investment without Displacement

One of the most time-sensitive needs is to ensure that Atlantans facing pricing pressures today have responsive resources today. If we do not address impending displacement now, we will permanently lose much of the ‘social mosaic’ we treasure in our city. Immediate actions include:

Comprehensive anti-displacement initiative:

- (1) Short-term and emergency solutions for those facing eviction
- (2) Renters’ rights programs and education
- (3) Property tax relief for affordable housing produced or preserved and existing owners
- (4) A toolbox of funding options for legacy business.

Additional priorities:

Develop comprehensive wealth building programs (e.g. pathways to ownership and financial literacy) for low and moderate-income residents and businesses in Atlanta’s predominantly Black and Brown neighborhoods experiencing significant investment.

Launch a focused outreach campaign about Tenant Based Voucher Programs aimed at apartment owners and property managers to encourage higher participation and acceptance.



Working Together Better & Smarter

To achieve our goals, we must work in more coordinated and collaborative ways – within sectors and across sectors.

A Funders’ Collective. Create a system for private and philanthropic resources to leverage public dollars to create and preserve affordable and mixed-income housing. A coordinated and braided (public, private, and philanthropic) investment system is essential to success.

Cabinet Level Housing Position.

Establish a cabinet-level position who works on behalf of the mayor and is responsible for (1) coordination across agencies that touch housing (2) the policy, coordination, and assemblage of public land for affordable housing (3) participation in funders’ collective (4) creation and monitoring of database of existing affordable housing for preservation and (5) cross-sector government affairs strategy to help influence policy.

Non-Profit Capacity. Expand support for non-profit and community-based developers focused on long-term affordability, mixed-income communities, and quality affordable housing for very low-income families through multi-year operating support, dedicated development funding, and relationship building.



Empowering Atlantans: Education & Engagement

To be successful and have staying power, we must empower residents and stakeholders with good information and meaningful opportunities to shape our future.

Expand understanding among regional leaders, policy makers, and professionals on how to address housing affordability across income bands (i.e. 0 - 120 % AMI) through educational resources and case studies highlighting successes and results.

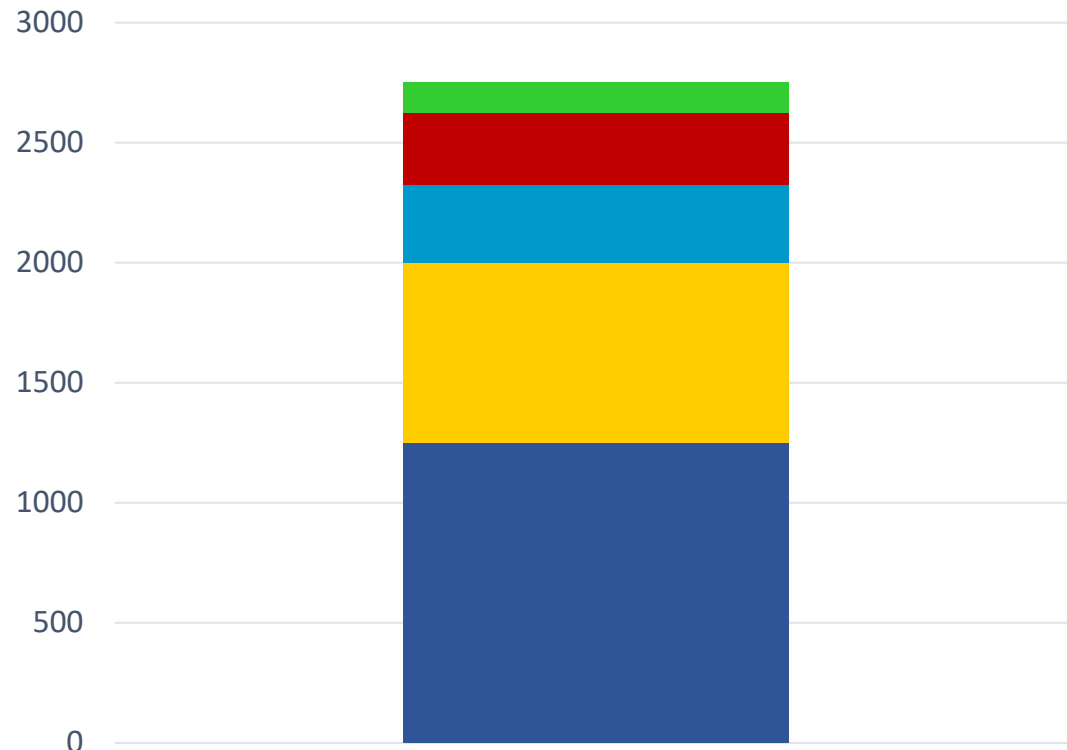
Strengthen civic infrastructure by evaluating the Neighborhood Planning Unit (NPU) system and identifying opportunities for deeper engagement while leveraging arts & culture, parks & greenspace, and other ways to meet Atlantans in their neighborhoods.

Create a communications strategy to educate residents on the importance and value of affordable housing and align strategy with tactics set forth in the Community Engagement Playbook.

Design inclusive decision making. Develop processes and programs that support inclusive decision making which reflect the core values outlined in the Atlanta City Design: Equity, Nature, Progress, Access, Ambition.

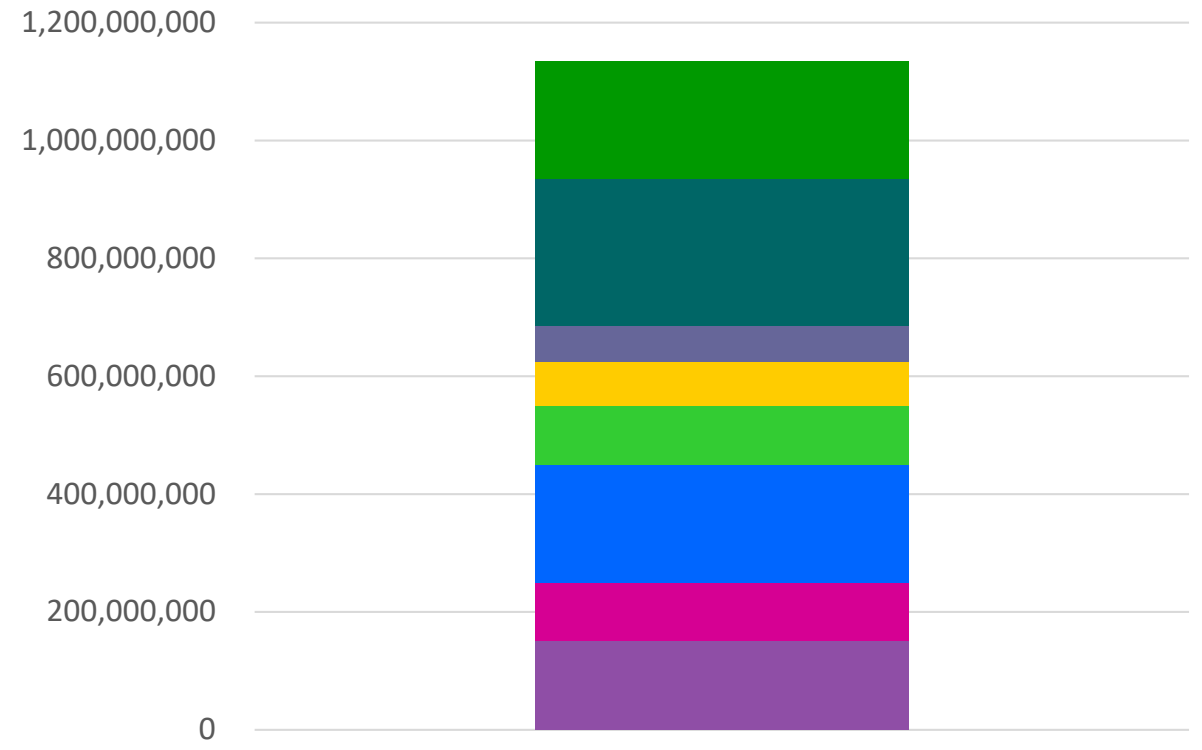
2,500+ affordable homes (new and preserved) annually requiring \$1 billion+ of local funding over 8 – 10 years

“Straw Man” path to 2,500+ annually



- Existing Inclusionary Zoning
- Regulatory Reform (little to no subsidy)
- Ownership (new, rehab, downpayment assistance)
- Preserved Rental (subsidized)
- New Rental (subsidized)

Potential Sources for \$1 billion goal



- Private Development
- NMTTC
- New, Dedicated Funding
- Public Land & Assets
- Impact Investing
- Philanthropy
- Bond(s)
- Existing City Public Funding Sources



Capacity Recommendations



Recommendation: Create a database of existing affordable housing properties in the City/metro region at risk of being lost in future years.

Description: Leverage existing technology platforms to establish a comprehensive affordable housing database, which will track existing publicly funding/supported affordable properties; enable proactive risk analysis and engagement; and track affordable housing pipeline in Metro Atlanta.

Key Partners:

- Metro Atlanta Public Sector Preservation Collaborative
 - City of Atlanta
 - Invest Atlanta
 - Atlanta BeltLine Inc.
 - HUD
 - DCA
 - Atlanta Housing
- Enterprise Community Partners – Southeast office; Knowledge Impact and Strategy Team
- Georgia Tech
- Atlanta Regional Commission
- Atlanta Real Estate Collaborative (AREC)
- Other University Partners
- Central Atlanta Progress, Midtown Alliance, Buckhead CID
- National Community Stabilization Trust
- Philanthropy

Outcomes (from problem definition statement):

This recommendation seeks to proactively address the following negative results outlined in the Preservation Working Group’s problem definition statement

- Individuals moving out of the city to a cheaper market increases commute time, adds to traffic, and lost productivity.
- Inability to pay rent leads to transiency (move outs and evictions) which has a major impact on schools and educational attainment.
- We are rapidly losing our low-wage workforce because they cannot afford to live in the city – rents are increasing at a rate higher than incomes.
- Creating concentrations of poverty – often in suburban areas.
- Other negative impacts on schools, health and air quality, inequality, and homelessness.
- Loss of social fabric, vibrant communities, and diversity in neighborhoods.

We are successful if (SMART metrics):

- A collaborative Affordable Housing Database is developed for Metro Atlanta, including all members of the Public-Sector Preservation Collaborative.
- The database is managed by GA Tech.
- The database is largely publicly accessible.

S.M.A.R.T. – specific, measurable, attainable, relevant, and time bound



- The database provides automated data updating, and the ability to generate reports.
- The database offers a mapping function.
- The database expands beyond the City of Atlanta to include other Metro Atlanta jurisdictions.
- The database leads to proactive preservation strategies, including owner engagement, acquisition, and technical assistance provision.

Budget (all figures are estimates):

Initial estimate of \$300,000

Timeline (who is doing what by when):

	2018	2019	2020	Ongoing
Who	Enterprise, with GA Tech and the Public-Sector Preservation Collaborative	Enterprise, GA Tech, Public Sector Partners, Philanthropy	Enterprise, GA Tech, Public Sector Partners, Philanthropy	Enterprise, GA Tech, Public Sector Partners, Philanthropy
What	Develop the framework for a Metro Atlanta Affordable Housing Database – data sources; data points to track; technology solution; budget; partners.	Implement Metro Atlanta Affordable Housing Database – Fund the effort; Build the technology platform; connect data sources; identify staff to manage ongoing maintenance – overall and at each public partner. Implement a risk analysis process to proactively identify and engage with properties at risk of losing affordability.	Expand Metro Atlanta Affordable Housing Database to include NOAH Stock, including SMMF. Identify other partners who can both utilize data for their work, and or provide additional complementary data for analysis, such as related to other areas of opportunity – health, mobility, employment, education. Incorporate data.	Continue to update/manage data. Continue to proactively engage with properties. Continue to utilize database to identify a preservation pipeline for Metro Atlanta.

S.M.A.R.T. – specific, measurable, attainable, relevant, and time bound



Recommendation: Create a system for private and philanthropic resources to leverage public dollars to create and preserve affordable and mixed income housing. A coordinated and braided (public, private and philanthropic) investment system is essential to success.

Description:

- Create a transparent coordinated public private funding system aligning with shared priorities and affordable housing goals of the city.
- To maximize coordination and enable the environment for success this will require a trusted and shared process to enable projects to move forward.
 - Operate a collaborative funders table of public, private and philanthropic partners that come together to swiftly coordinate and solve barriers enabling the environment for pipeline production and promotion of equitable development. This would be different than taking the one-off deal driven transaction to a pipeline and place based impactful approach.
- Create a mechanism/hub to coordinate all public and private resources. A one-stop shop like mechanism coordinating all affordable housing resources with aligned application processes (i.e.: Acquisition fund, Social Impact Fund below market debt, preservation equity funds, State and City funding, a catalytic Philanthropic fund and Opportunity Fund).
 - Utilize technology to pursue common application and common compliance across variety of funding partners.
- Organize stakeholders on critical projects requiring coordinated financing solutions.
- Provide technical assistance to developers of affordable housing to support borrowing capacity (i.e.: joint venture, guarantees or credit enhancements).
- Assess current affordable housing ecosystem to create a comprehensive pipeline tracker and road map that all funders can use for decision making on investments. Pipeline can also include mapping all publicly owned land suitable for affordable housing development.
- A feasibility tool to determine project readiness and to evaluate public benefit being realized.
- Host quarterly learning convenings and surveys to evaluate system's successes and challenges to evolve its efficiency and support ongoing recommendations and aligned resource policy.



- Through the coordinated platform, identify and assist in raising capital for new financing tools needed to support remaining gaps in pipeline.
- Evaluate tools to incorporate equitable development principles and shared value of partners and funders.

Key Partners:

- Philanthropic Partners supporting Affordable Housing: The Community Foundation GoATL, Westside Future Fund, The Kendeda Fund, The Arthur M. Blank Foundation, Anne E. Casey Foundation, and other key regional and national foundations
- House ATL Working Group Members: Sarah Kirsch, Meaghan Vlkovic, David Allman, Marjy Stagmeier, Columbia Residential, Cecil Phillips, Brian Cayce, Leonard Adams
- Public Partners with resources: GA DCA, Invest Atlanta, COA Housing, Atlanta Housing, Partners For Home, and Atlanta BeltLine
- Private Partners with resources: Tri-Star, Enterprise Community Loan Fund, Atlanta Neighborhood Development Partnership, Reinvestment Fund, Low Income Investment Fund
- Banking and Corporate Partners: GA Power, SunTrust, Wells Fargo, Bank of America, PNC, JPMorgan
- Faith-based organizations
- TransFormation Alliance

Outcomes (inverted from problem definition statement):

- Affordable housing production is flat or increasing
- Low and moderate-income residents have more and better options
- New housing production serves a broad cross-section of the market
- Private investments is harnessed to produce workforce housing, contributing to Atlanta's economic competitiveness.
- There is improved understanding and a shared perspective on how to address housing affordability across income bands
- National philanthropy has confidence to engage based on leadership and commitment of local philanthropy

We are successful if (SMART metrics)

- An assessment of current ecosystem of resources and pipeline of affordable housing at 0 – 120% AMI is compiled by 4Q 2018.
- A coordinated investment system business plan is completed by 4Q 2018 and adopted by critical public and private partners by 4Q 2018.



- A feasibility tool to determine project readiness and aligned equitable development opportunities is completed by 1Q 2019.
- A template helping funders understand investment options and impact completed by 4Q 2018.
- Staffing and program infrastructure in place for operationalizing a coordinated system by 1Q 2019.
- Coordination with debt, equity and subsidy public and private funders of resources (current and or new) will be ongoing starting 4Q 2018.
- Pilot and demonstrate coordinated investment system approaches with 3 projects on the pipeline 4Q 2018 (including the modeling for 4% tax exempt bond transactions)
- Technology to support a public and private coordinated transparent system for developers and funders is designed by end of 1Q 2019 and operating in 2Q 2019.

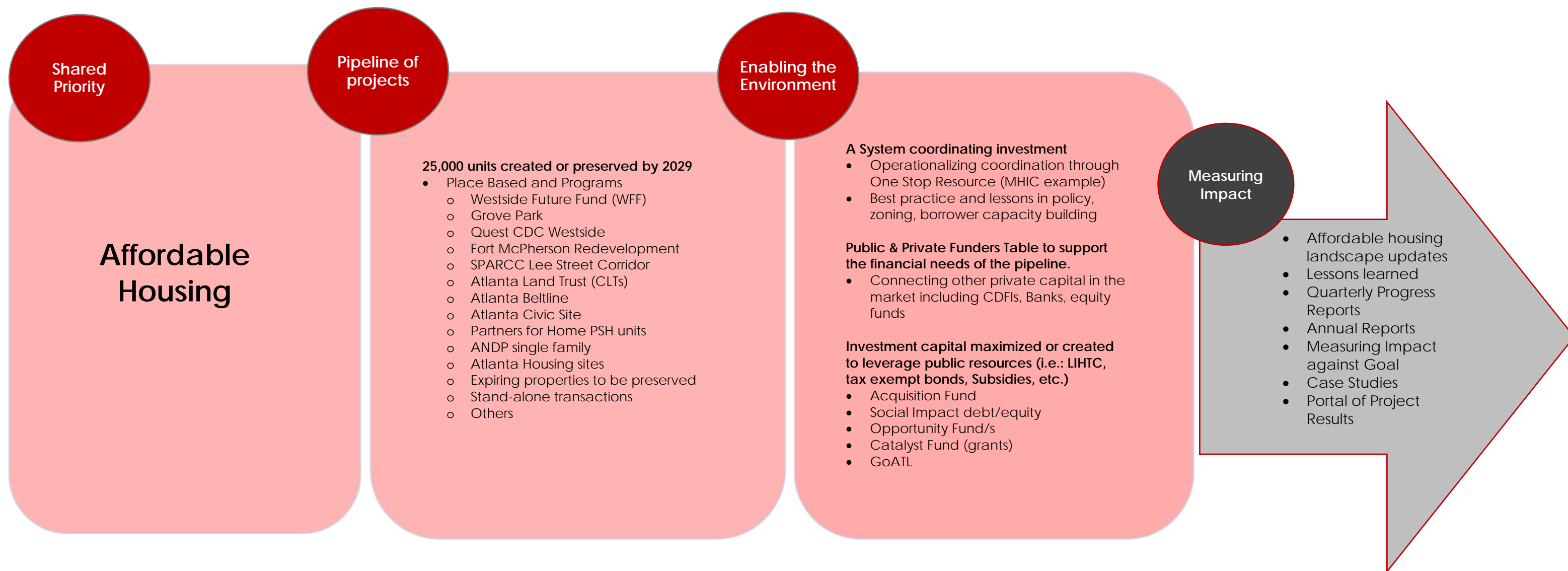
Budget (all figures are estimates):

Operations: Staff, Consultants, Technology, Other than Personal Services - Yr 1 \$ 400,000, Yr 2 \$350,000, Yr 3 \$350,000

Timeline (who is doing what by when):

	2018	2019	2020	Ongoing
Who	Enterprise (lead) TransFormation Alliance (equity screen)	Enterprise/KIS team Technology Consultant TBD	Enterprise Backbone organization working with partners to implement system	
What	Ecosystem of Resources and Pipeline assessed (E) Business Plan for coordinated system (E) Project feasibility and equity inclusion screen finalized (TFA) Demonstrate coordinated system approaches with 3 projects (E) Staffing and back office infrastructure secured and operationalized (E)	Technology platform to support the coordinated system (ie: one stop like vehicle). City owned land assets/Land Bank data portal for affordable housing pipeline development completed. Operations of business plans		

Coordinated Investment System Road Map (example)



The framework outlined above intersects with HouseATL’s 5 working groups on 1) Community Retention 2) New Private Investment 3) Preservation 4) Public Resources and 5) Under 50% AMI.



Recommendation: Create a cabinet level position, reporting to the Mayor and charged with cross-agency collaboration, including with state, at a policy and production level.

Description:

- “Chief Housing Officer” that establishes City-wide and selected neighborhood affordable housing policy, priorities and goals in coordination with the public-sector agencies who influence production and preservation of affordable housing.
- Establishes a shared vision for the strategic investment and coordination of housing resources (both on an annual and multi-year sustained basis), grants, donations, philanthropy and Tax Allocation Districts (TADs) to address affordability in the City.
- Provides strategic and operational leadership for the implementation of the Mayor’s pledge of \$1 Billion for the creation and preservation of affordable housing units in Atlanta.
- Provides strategic and executive-level interface with the Business, Charitable, Non-profit, Philanthropic, Civic and Educational communities regarding affordable and workforce housing initiatives.
- Completes a “real time” digital and GIS simulated “score card” tracking investment, production and monitors effectiveness of agency and community coordination.
- Works with Funders’ Collective and associated partners on developing tools for common application and common compliance for funding.

Key Partners:

- **Public Agencies:** City of Atlanta Mayor’s Office, Department of City Planning , Department of Finance (collectively “City”), Invest Atlanta, Atlanta Housing, Atlanta Beltline, Inc., Land Bank Authority
- **Other Public Agencies:** State of Georgia, Fulton County (including Tax Commissioner), DeKalb County (including Tax Commissioner), MARTA, Atlanta Public Schools, U.S. Housing and Urban Development (HUD), Federal Home Loan Bank, DeKalb County Public Schools
- **Non-Profit and Philanthropic Community:** House ATL, Urban Land Institute, Blank Foundation, Community Foundation, United Way, Chamber of Commerce, Downtown Atlanta Alliance, Atlanta Neighborhood Development Partnership, City for All, Airport West Community Improvement District, Atlanta Downtown Improvement District, Buckhead Community Improvement District, Little Five Points Community Improvement District, Midtown Improvement District, West End Community Improvement Districts
- **For Profit and Non-Profit Developers**

S.M.A.R.T. – specific, measurable, attainable, relevant, and time bound



Outcomes (from problem definition statement):

Public sector agencies influencing housing in the city of Atlanta have sufficient and sustainable resources, coordinated leadership, and a shared vision for coordinating resources to execute on the continuum of affordable housing need.

- **We are successful if (SMART metric):** Appointment of a cabinet level position, reporting to the Mayor and charged with cross agency collaboration on the City's affordable housing goal.
- **Measurable:** New City organizational chart that shows a Housing Cabinet level position reporting to the Mayor.
- **Attainable:** Discussion and advocacy with the Mayor for the need for the position and encouraging a swift appointment.
- **Relevant:** Initiatives relating to affordability, including, the pledge of \$1 Billion towards affordable housing and the activation of numerous recommendations expected from HouseATL and other affordable housing task forces will need day-to-day focus, implementation and administration. The time is ripe for that focus now.
- **Time Bound:** Appointment can be made within 45 days of the recommendation and may need confirmatory approval of the City Council.

Budget (all figures are estimates): See attached

Timeline (who is doing what by when):

Who	What	When	Comments
HouseATL	Make Recommendation to Mayor for appointment of cabinet-level position	September 2018	
Mayor	Establish Position	October 2018	
City Council	Approval of candidate for Housing cabinet-level position	January 2019	If approval is necessary
<ul style="list-style-type: none"> • Housing Cabinet Level Position • Leaders at: <ul style="list-style-type: none"> ○ Atlanta Housing ○ Invest Atlanta ○ Atlanta BeltLine 	Creation of comprehensive affordable housing vision	December 2018 – January 2019	Drafting includes community engagement

S.M.A.R.T. – specific, measurable, attainable, relevant, and time bound



Who	What	When	Comments
<ul style="list-style-type: none"> o Land Bank • Selected Civic, Religious, Charitable and Philanthropic leaders 			
Housing Cabinet Level Position	Strategic Alignment and Delivery of Resources	January 2019 – February 2019	
Housing Cabinet Level Position	Create a Housing Sub Cabinet	January 2019 – February 2019	
<ul style="list-style-type: none"> • Housing Cabinet Level Position • Leaders at: <ul style="list-style-type: none"> o Atlanta Housing o Invest Atlanta o Atlanta BeltLine o Land Bank • Selected Civic, Religious, Charitable and Philanthropic leaders 	Formulate Annual Scorecard	March 2019	
Housing Cabinet Level Position	Annual Reporting	December 2019	

S.M.A.R.T. – specific, measurable, attainable, relevant, and time bound

Chief Housing Officer - 12-Month Operational Budget		
Account Description	Total - Initial 12-Months	Comments/Assumptions
OPERATING EXPENSE		
Advertising & Marketing	\$ 3,000	
Audit	\$ 1,500	
Bank Charges		
Computer Equipment/Software	\$ 12,500	Assumes 5 employees at \$2,500/employee
Conferences & Training (<i>Fees Only</i>)	\$ 15,000	
Consulting	\$ 75,000	Cost of consultants may be shared with Planning Dept.
Copiers	\$ 3,000	
Courier & Packages	\$ 250	
Employee Taxes and Benefits	\$ 206,000	40% of Salaries line
Insurance Expense		
Interest Expense		
Legal & Professional	\$ 1,500	
Meals & Entertainment (Local)		
Meals & Entertainment (Travel)	\$ 2,500	
Membership Dues	\$ 7,500	
Office Supplies	\$ 6,500	
Rent		
Postage	\$ 3,500	
Repairs & Maintenance	\$ 2,500	
Recruitment		
Salaries	\$ 515,000	Salary High End Estimates: Executive (\$200K), Deputy (\$130K), 2 Analysts (\$70K/each), Administrative (\$45K)
Subscriptions - Media/Periodicals	\$ 1,250	
Symposium		
Telephone/Communications	\$ 7,500	
Data Lines		
Temporary Staffing	\$ 7,500	
Travel	\$ 8,500	
Hotels/Lodging	\$ 8,000	
Parking/Tolls/Cab/Mileage	\$ 1,500	
Web Hosting/Support & General Maint	\$ 1,500	
OPERATING EXPENSE SUBTOTAL	\$ 891,000	



Recommendation: Expand support for non-profit and community-based developers focused on long-term affordability, mixed-income communities, and quality affordable housing for very low-income families through multi-year operating support, dedicated development funding, and relationship building. This will facilitate construction, acquisition and/or preservation of affordable housing at scale.

Description:

Project Financing

- Double current resource allocations (CDBG, HOME funds, etc.) for non-profit and community-based developers and determine opportunities for optimization
- Invest resources that could aid in the capacity / agility of non-profit mission-aligned developers to acquire affordable land and/or properties (e.g. creation of a database of the inventory/pipeline available)

Policy

- Vet legislative options at the State level that would allow for the following:
 - Provide the ability for land banks and/or qualified affordable housing developers to issue trump bids at tax sales
 - Provide the ability for land banks and/or qualified housing developers to obtain derelict and foreclosed properties at tax sale for a 50% or steeper discount.
- Work with the City to adopt a grace period or waiver on code fines for non-profits who obtain substandard property for some reasonable period of time (90-120 days)

Capacity Building

- Build a high capacity network of non-profit developers interested in purchasing at-risk affordable housing (NOAH and Expiring Subsidies – e.g. LIHTC expiring affordability periods) and build an infrastructure to facilitate such transactions.
- Invest resources that could enable non-profit housing organizations to invest in talent retention/recruitment efforts of key housing development personnel

Key Partners:

- City of Atlanta – Office of Housing
- Metro Atlanta Public Sector Preservation Collaborative (City of Atlanta, Invest Atlanta, Atlanta BeltLine Inc., HUD, DCA, and Atlanta Housing)
- Fulton County Tax Commissioner
- Mission Aligned Developers (CDCs, non-profits, for-profits)



- NeighborWorks America
- Georgia ACT
- Enterprise Community Partners
- Incremental Development Alliance
- Reinvestment Fund
- Multifamily Brokers
- Affordable Multifamily Owners
- Historic preservation organizations (Georgia Trust, Historic Atlanta)
- Atlanta-Fulton Land Bank Authority
- Federal Reserve Bank of Atlanta
- Philanthropic community
- Urban Land Institute (ULI)
- Faith-Based Community

Barriers and Outcomes Addressed (inversion from problem statement):

- Non-profit housing developers, with the mission and expertise to serve this population, have the resources to scale up to meet the need
- Addresses burdensome regulatory costs that prevent new supply
- Addresses complicated funding matrix that creates a barrier to entry – for profit / market rate developers are absent from discussion.

We are successful if (SMART metrics)

- Over the next 5 years, non-profit developers focused on long-term affordability for very low-income families have doubled their production.
- If there is a resource infrastructure¹ that supports the development of long-term affordable housing for very low-income families by non-profit organizations.
- If the current percentage allocation of affordable funding for non-profit developers is doubled.

Budget (all figures are estimates):

Operational Support

\$6.5 million over 5 years

¹ System(s) in place with key funding partners that have shared priorities and are coordinating resources and working together to achieve agreed upon goals



Technical

\$975,000.00 over 5 years (195,000.00 annually)

Out of the total projected amount of a dedicated funding source², an allocation of at least 30% of housing funds to be used for developments sponsored by non-profits in exchange for long-term affordability.

Timeline (who is doing what by when):

	2018	2019	2020	Ongoing
Who	Non-profit Intermediaries	Non-Profit developers Non-profit Intermediaries	Non-Profit Developers	Non-profit Intermediaries
What	Assessment/Plan/TA/Train for non-profit developer and subsidies providers Resource Alignment	TA Pre-development Multi-year funding	On-going pre-development and construction	TA Construction Preservation

² See Public Investment’s final recommendation for dollar amount



Recommendation: Create a system for private and philanthropic resources to leverage public dollars to create and preserve affordable and mixed income housing. A coordinated and braided (public, private and philanthropic) investment system is essential to success.

Description:

- Create a transparent coordinated public private funding system aligning with shared priorities and affordable housing goals of the city.
- To maximize coordination and enable the environment for success this will require a trusted and shared process to enable projects to move forward.
 - Operate a collaborative funders table of public, private and philanthropic partners that come together to swiftly coordinate and solve barriers enabling the environment for pipeline production and promotion of equitable development. This would be different than taking the one-off deal driven transaction to a pipeline and place based impactful approach.
- Create a mechanism/hub to coordinate all public and private resources. A one-stop shop like mechanism coordinating all affordable housing resources with aligned application processes (i.e.: Acquisition fund, Social Impact Fund below market debt, preservation equity funds, State and City funding, a catalytic Philanthropic fund and Opportunity Fund).
 - Utilize technology to pursue common application and common compliance across variety of funding partners.
- Organize stakeholders on critical projects requiring coordinated financing solutions.
- Provide technical assistance to developers of affordable housing to support borrowing capacity (i.e.: joint venture, guarantees or credit enhancements).
- Assess current affordable housing ecosystem to create a comprehensive pipeline tracker and road map that all funders can use for decision making on investments. Pipeline can also include mapping all publicly owned land suitable for affordable housing development.
- A feasibility tool to determine project readiness and to evaluate public benefit being realized.
- Host quarterly learning convenings and surveys to evaluate system's successes and challenges to evolve its efficiency and support ongoing recommendations and aligned resource policy.

S.M.A.R.T. – specific, measurable, attainable, relevant, and time bound



- Through the coordinated platform, identify and assist in raising capital for new financing tools needed to support remaining gaps in pipeline.
- Evaluate tools to incorporate equitable development principles and shared value of partners and funders.

Key Partners:

- Philanthropic Partners supporting Affordable Housing: The Community Foundation GoATL, Westside Future Fund, The Kendeda Fund, The Arthur M. Blank Foundation, Anne E. Casey Foundation, and other key regional and national foundations
- House ATL Working Group Members: Sarah Kirsch, Meaghan Vlkovic, David Allman, Marjy Stagmeier, Columbia Residential, Cecil Phillips, Brian Cayce, Leonard Adams
- Public Partners with resources: GA DCA, Invest Atlanta, COA Housing, Atlanta Housing, Partners For Home, and Atlanta BeltLine
- Private Partners with resources: Tri-Star, Enterprise Community Loan Fund, Atlanta Neighborhood Development Partnership, Reinvestment Fund, Low Income Investment Fund
- Banking and Corporate Partners: GA Power, SunTrust, Wells Fargo, Bank of America, PNC, JPMorgan
- Faith-based organizations
- TransFormation Alliance

Outcomes (inverted from problem definition statement):

- Affordable housing production is flat or increasing
- Low and moderate-income residents have more and better options
- New housing production serves a broad cross-section of the market
- Private investments is harnessed to produce workforce housing, contributing to Atlanta's economic competitiveness.
- There is improved understanding and a shared perspective on how to address housing affordability across income bands
- National philanthropy has confidence to engage based on leadership and commitment of local philanthropy

We are successful if (SMART metrics)

- An assessment of current ecosystem of resources and pipeline of affordable housing at 0 – 120% AMI is compiled by 4Q 2018.
- A coordinated investment system business plan is completed by 4Q 2018 and adopted by critical public and private partners by 4Q 2018.

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- A feasibility tool to determine project readiness and aligned equitable development opportunities is completed by 1Q 2019.
- A template helping funders understand investment options and impact completed by 4Q 2018.
- Staffing and program infrastructure in place for operationalizing a coordinated system by 1Q 2019.
- Coordination with debt, equity and subsidy public and private funders of resources (current and or new) will be ongoing starting 4Q 2018.
- Pilot and demonstrate coordinated investment system approaches with 3 projects on the pipeline 4Q 2018 (including the modeling for 4% tax exempt bond transactions)
- Technology to support a public and private coordinated transparent system for developers and funders is designed by end of 1Q 2019 and operating in 2Q 2019.

Budget (all figures are estimates):

Operations: Staff, Consultants, Technology, Other than Personal Services - Yr 1 \$ 400,000, Yr 2 \$350,000, Yr 3 \$350,000

Timeline (who is doing what by when):

	2018	2019	2020	Ongoing
Who	Enterprise (lead) TransFormation Alliance (equity screen)	Enterprise/KIS team Technology Consultant TBD	Enterprise Backbone organization working with partners to implement system	
What	Ecosystem of Resources and Pipeline assessed (E) Business Plan for coordinated system (E) Project feasibility and equity inclusion screen finalized (TFA) Demonstrate coordinated system approaches with 3 projects (E) Staffing and back office infrastructure secured and operationalized (E)	Technology platform to support the coordinated system (ie: one stop like vehicle). City owned land assets/Land Bank data portal for affordable housing pipeline development completed. Operations of business plans		

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Funding Recommendations



Recommendation: Develop a toolbox of financing & leasing options for legacy business owners to be able to remain in place

Description:

- Identify and explore a legacy business tax credit, including any legal hurdles
- Provide legacy business owners with access to accessible financing in order to purchase their commercial spaces (i.e., lower interest, more flexible commercial loans)
- Explore possibility/viability of commercial co-operatives
- Cultivate nonprofit-legacy business partnerships to provide long-term affordable commercial space to legacy business owners (i.e., a version of commercial rent control)
- Cultivate nonprofit-legacy business owner joint ventures to provide legacy business owners with the opportunity to purchase their own commercial spaces
- Reinvigorate the Urban Enterprise (UEZ) program in the city, secure Fulton County's participation¹
- Target neighborhoods where small businesses are at high risk of displacement (i.e. Westside and BeltLine)
- Identify legal resources that small business owners might benefit from resulting from tenant displacement/rights.
- Include asset management as a component of the toolkit.

Key Partners:

- Atlanta Wealth Building Initiative
- PSE
- OneAtlanta
- Atlanta Beltline Partnership
- Invest Atlanta
- Fulton County
- The Arthur M. Blank Family Foundation – other philanthropic partners?
- GA Watch
- GA MicroEnterprise Network (GMEN)
- Grove Park Foundation
- Bank On Atlanta, small business program
- Mayor's Office of Immigrant Affairs
- City Accelerator program²

¹ An "urban enterprise zone" (UEZ) is a designated district that is located within an economically-depressed area of the City where property owners receive tax abatements over a ten- year period, if certain conditions are met.

<https://www.atlantaga.gov/government/departments/city-planning/office-of-housing-community-development/economic-development-division/urban-enterprise-zone>

² an initiative of the Citi Foundation and Living Cities, to foster innovation and promote collaboration between urban leaders to support the growth of local minority-owned businesses <https://www.atlantaga.gov/Home/Components/News/News/11645/672>

S.M.A.R.T. – specific, measurable, attainable, relevant, and time bound



Outcomes (from problem definition statement):

Addresses that Atlanta is losing its social fabric as predominantly black and brown residents are displaced and we lose social and cultural assets.

We are successful if (SMART metrics)

- The legacy business owner tool kit is created by spring 2019
- We are able to quantify the level of need by 1Q19
- Goals are identified for the number of businesses who will be supported over next 3 years

Budget (all figures are estimates):

\$3 million in loans committed by 2019

Timeline (who is doing what by when):

	2018	2019	2020	Ongoing
Who	Blank Foundation	Key partners		Blank Foundation
What	Host a focus group for small business owners at risk of displacement to run through the menu of options available and what other offerings are needed to help them stay in place.	\$3 Million in loans committed		Assesses impact and opportunity for expansion

S.M.A.R.T. – specific, measurable, attainable, relevant, and time bound



Recommendation: Secure \$50 million to \$75 million in funding for single-family preservation.

Description:

Maximize allocation for and utilization of New Markets Tax Credits (NMTC) by non-profit and potentially other developers to fund construction and acquisition/rehab of affordable single-family housing in low-income/high-poverty neighborhoods.

Key Partners:

- Invest Atlanta
- City of Atlanta Office of Housing
- Representatives of key place-based initiatives
- Nonprofit developers with prior NMTC experience or capacity required to execute at scale, complexity and timeline
- Law firms with NMTC experience
- Atlanta-focused banks, CDFIs or other Community Development Entities (CDEs) with current or potential for future NMTC allocations

Outcomes (from problem definition statement):

This recommendation seeks to proactively address the wealth gaps, declines in homeownership rates and some of the negative results outlined in the Preservation Working Group's problem definition statement:

- Individuals moving out of the city to a cheaper market increases commute time, adds to traffic, and lost productivity
- Homeownership rates have declined significantly among African American households. As homeownership has accounted for 92% of African American family wealth, there is a need to provide inclusive homeownership opportunities in the City.
- We are rapidly losing our low-wage workforce because they cannot afford to live in the city – rents are increasing at a rate higher than incomes and monthly mortgage costs are often lower than rents on comparable units.
- Creating concentrations of poverty – often in suburban areas.
- Other negative impacts on schools, health and air quality, inequality, and homelessness.
- Loss of social fabric, vibrant communities, and diversity in neighborhoods.

We are successful if (SMART metrics)

- City of Atlanta nonprofit developers and place-based initiatives receive and invest \$50 million to \$75 million of NMTC for single-family homes by 12/31/21.
- Successful match making between qualified development partners and Community Development Entities (CDEs) with NMTC allocations.

S.M.A.R.T. – specific, measurable, attainable, relevant, and time bound



- Increase in CDE application pipelines for single-family development in City and metro area.
- 400 new low- to moderate-income homeowners in low-income/high-poverty rate neighborhoods.

Budget (all figures are estimates):

- Citywide award of NMTC’s valued at \$50 - \$75 million

Timeline (who is doing what by when):

	2018	2019	2020	Ongoing
Who	-Invest Atlanta, City of Atlanta Office of Housing, prior Atlanta users of NMTC (ANDP and Habitat International) - Kutak Rock - Smith New Markets Group	-Invest Atlanta, City of Atlanta Office of Housing, NMTC-ready development partners - Kutak Rock - Smith New Markets Group -Atlanta-focused housing CDFIs -Local Atlanta Bank Leadership -Atlanta-focused CDEs	- Invest Atlanta, City of Atlanta Office of Housing, NMTC-ready development partners - Kutak Rock - Smith New Markets Group -Atlanta-focused housing CDFIs -Local Atlanta Bank Leadership -Atlanta-focused CDEs	-Invest Atlanta, City of Atlanta Office of Housing, NMTC-ready development partners - Kutak Rock - Smith New Markets Group -Atlanta-focused housing CDFIs -Local Atlanta Bank Leadership -Atlanta-focused CDEs
What		- 1 st Qtr convening of potential CDE partners to promote the program. -One-on-one outreach to targeted CDEs requesting inclusion of Atlanta single-family projects in their fall 2019 applications to CDFI's NMTC Fund. -Technical assistance provided to potential nonprofit developers and place-based initiatives interested in using the program. -Closing of 2019 deals.	- Ongoing matchmaking between CDEs and qualified developers -Annual progress meeting with City, CDEs, developers, place-based initiative leadership -Tracking of CDE application pipelines and approved projects and units -2020 goal attainment -Update with Georgia Congressional delegation and CDFI Fund on progress to date. -Complete \$50 M to \$75 M in 3 rd year.	- Program review - Projects approved 2018 to 2021 v.s. goal. -Ongoing progress meetings and tracking of CDE application pipelines and approved projects/units.

S.M.A.R.T. – specific, measurable, attainable, relevant, and time bound



Recommendation: Multifamily revenue source – Create a financing mechanism to recapitalize and preserve LIHTC properties at Year 15 via existing owners.

Description:

Create a long-term, low cost financing tool to recapitalize Year 15 LIHTC properties via existing owners, enabling light to moderate rehab and long-term preservation and sustainability of properties.

Key Partners:

- Metro Atlanta Public Sector Preservation Collaborative
 - City of Atlanta
 - Invest Atlanta
 - Atlanta BeltLine Inc.
 - HUD
 - DCA
 - Atlanta Housing
- Private Funders/Financing Entities
 - CDFIs – Enterprise, RF, LIIF, ANDP, Others
 - Banks
 - Corporations
 - Philanthropy
- LIHTC Developers – Nonprofit and For Profit
- GA Affordable Housing Coalition

Outcomes (from problem definition statement):

This recommendation seeks to proactively address the following negative results outlined in the Preservation Working Group’s problem definition statement:

- Individuals moving out of the city to a cheaper market increases commute time, adds to traffic, and lost productivity
- Inability to pay rent leads to transiency (move outs and evictions) which has a major impact on schools and educational attainment.
- We are rapidly losing our low-wage workforce because they cannot afford to live in the city – rents are increasing at a rate higher than incomes.
- Creating concentrations of poverty – often in suburban areas.
- Other negative impacts on schools, health and air quality, inequality, and homelessness.
- Loss of social fabric, vibrant communities, and diversity in neighborhoods.

S.M.A.R.T. – specific, measurable, attainable, relevant, and time bound



We are successful if (SMART metrics)

- A preservation financing tool is created to support recapitalization of Year 15 LIHTC properties, preserving affordability with existing owners. This tool will be outside of the 9% LIHTC resource.
- Public and Private financing entities partner to leverage funds and provide low cost, long term financing.
- Approximately 12,000 units reach Year 15 within the next five years; the committee that develops this financing tool will develop a goal to address a subset of the most at risk properties within this universe. (It is premature to set a goal, as the financing mechanism is not yet developed).

Budget (all figures are estimates): TBD

Timeline (who is doing what by when):

	2018	2019	2020	Ongoing
Who	DCA, with developers and public partners	DCA, CDFIs, Public Partners	CDFIs, Banks	Developers
What	Engage LIHTC Developers, DCA, and other public and private financing partners to detail Year 15 financing needs and potential solutions. DCA, with public partners, will set annual goals for number of units preserved vis this financing mechanism.	DCA to engage public and private partners to develop a long-term low-cost financing tool – initially funded with public funds.	Private funding sources leverage public funds to increase preservation opportunities.	Year 15 properties access this financing tool to preserve affordability.

S.M.A.R.T. – specific, measurable, attainable, relevant, and time bound



Recommendation: Demonstrate how impact investing and private capital can fill gaps in financing affordable housing development and preservation by establishing housing-specific impact fund(s).

Description:

- Three to four new impact funds focused on affordable housing and related needs/ services, could include:
 - Acquisition TOD fund – a public private participation structure to support competitive terms for the acquisition of land and property to secure sites for affordable housing.
 - Social impact below market debt/equity fund(s) – private investor fund to support gap financing needs of affordable housing development and preservation.
 - Leveraging Opportunity Zone funds – capitalizing on the new tax reform bill to create an equity resource for affordable housing development in qualified census tracts submitted by the Governor’s office and approved by HUD. This is could support number of priority place-based initiative pipeline in Atlanta. Create a system to use the Opportunity Fund capital to support our pipeline in qualified census tracts.
 - Catalyst fund – a grant fund supported by philanthropy and corporate foundations that would help catalyze projects forward. This could be gap funding, seed funding, option funding to be competitive in the market, guarantees or credit enhancements to build borrowing capacity of mission driven organizations, etc.
- The funds will be developed around the existing pipeline of projects and major place-based initiatives. They will start with location-based investments to prove the concept and in support of broader investment long term;
- Key to success will be a case statement of what the funds will be used for, approximate number of units, a governance structure, and affordability targets;
- Initial investments should be different prototypes of where these funds can make a difference (e.g. one new construction mixed-income community, one preservation opportunity, one site acquisition, one long-term rent subsidy);
- The funds leverage existing public partner efforts to maximize public-private partnerships, particularly around strategic priorities for the city.
- Leverage the process and governance structure of funds already in operation (i.e. TriStar’s impact fund and Go ATL) to share best practices, mission, fund structure, etc.

Note: An assessment of the current ecosystem will be a part of the coordinated investment framework to align and or connect existing capital to support the new fund vehicles (ie: CDFI and bank community development capital).

S.M.A.R.T. – specific, measurable, attainable, relevant, and time bound



Key Partners:

- Working group members: David Allman, Jim Schroder, Marjy Stagmeier, Cecil Phillips, Brian Cayce, Meghan Shannon-Vlkovic
- Existing funds: TriStar, Westside Future Fund, and GoATL Fund
- Enterprise Community Partners
- Affordable housing developers and owners
- High net worth individuals and their advisors/ managers
- Department of Community Affairs
- Atlanta Housing
- City of Atlanta and OneAtlanta

Outcomes this Addresses (inverted from problem definition statement):

- Affordable housing production is increasing.
- Low and moderate-income residents have more and better options.
- New housing stock is serving a broad cross-section of affordability ranges.
- Private investment is harnessed to produce workforce housing– improving Atlanta’s economic competitiveness.
- There is a better understanding and a shared perspective on how to address housing affordability across income bands (i.e. 0- 120 % AMI).

We are successful if (SMART metrics)

- Identify a pipeline and funding needs to help design fund/s strategy completed by 3Q 2018.
- Articulate new social impact fund strategy and investor pitch deck by 4Q 2018.
- By end of 4Q2018, have a pitch deck and broad consensus of pipeline of Opportunity Fund eligible projects to support leveraging and deployment of opportunity fund capital in the market.
- Model and demonstrate a minimum of two investments supporting fund development by 4Q 2018.
- Operationalize one new social impact fund by 1Q 2019.
- Evaluate additional social impact fund needs (including models/ lessons learned of funds in other states) by 1Q 2019.
- Operationalize one acquisition fund by 1Q 2019.
- Create a philanthropic catalyst grant fund by 1Q 2019.
- Complete three investments by 2Q 2019 and,
- We can communicate the missional impact and financial success of the pilots to grow the fund(s) through the end of 2019.

S.M.A.R.T. – specific, measurable, attainable, relevant, and time bound



Budget (all figures are estimates): Will vary depending on fund type and structure

Timeline (who is doing what by when):

	2018	2019	2020	Ongoing
Who/ What	Enterprise identifies viable pipeline Enterprise works with COA, LIIF, TFA and partners to create business plan for nimble Acquisition Fund Opportunity Zone funding system articulated	Enterprise facilitates philanthropic catalyst fund Structure to leverage opportunity zone capital operationalized		Engage a broader network of CDFI's, as an opportunity to build capacity.
Who/ What	David and Marjy meet with legal experts to begin setting up fund	Enterprise + the coordinated collaborative (Kendeda, Kaiser, CFGA, Blank Foundation, Cousins Foundation, Anne E. Casey, and GA Power.		
Who/ What				

S.M.A.R.T. – specific, measurable, attainable, relevant, and time bound



Recommendation: Create a package of substantial new (one), repurposed, and/ or expanded public revenue sources for the production or preservation of affordable housing.

The new sources of revenue could be designated into existing housing agency programs, to the General Fund for debt service on new housing bonds, or invested in a new, “braided” public-private fund that has scale and flexibility to be directed in furtherance of strategic priorities (i.e., land acquisition, housing near transit, targeted geographical areas) by a new housing cabinet.

Description: Options for consideration include

ONE-TIME FUNDINGS:

- Issue a \$250 million Housing Opportunity Bond in 2019¹
- Designate \$50 million in New Markets Tax Credits for mixed-use/ rental or single-family homes over the next four years (assuming Congressional renewal)
- Redirect/ repurpose a modest portion of the TSPLOST MARTA funds to a “Living Transit Fund” for land acquisition

NEW, REPURPOSED, OR EXPANDED ANNUAL FUNDING²:

There are several funding options the City should consider, each with pros and cons as summarized on the following exhibit. These include but are not limited to the following:

- Establish a new tax of 15-20% on gross revenues from surface parking lots to generate \$15-20 million annually
- Establish a Housing Trust Fund by repurposing 5 mils in the General Fund to generate \$8 million annually
- Expand the real estate transfer tax (local option) to generate an additional \$3-4+ million annually.³
- Establish a tax (or enforce the existing through new regulation) on Airbnb rentals and/or sharing economy more broadly to generate approximately \$2-3 million annually
- Funds collected in TADS prior to 2018 but not yet committed should be designated, all or partially, for affordable housing within the TAD.
- The 1% Municipal Option Sales Tax (MOST) was created in 2004 to pay for sewer upgrades. It expires in 2020, presenting an opportunity to repurpose a portion of the tax

¹ This could be in smaller issuances over time, e.g. \$50 million in year one; \$100 million in year two. Note that a bond is a mechanism and not a source of funds.

² “New” funding sources for housing can be created by one of two ways: (1) expanding an existing program or inserting a new program—such as a housing bond or trust fund—into the existing budget that would be funded by cuts to other budgetary line items, or (2) creating new taxes or fees, which typically will require voter and/or state legislative approval.

³ Other work by Emory/ Frank Alexander showed that Fulton County could generate \$45 - \$75 million annually if Real Estate Transfer Tax increased to rate of neighboring states.



to affordable housing. A fractional portion (say 0.1%) would raise approximately \$13 million annually. This would require state legislative and voter approval to extend and repurpose it.

- Offer 15+ year tax exemption by right for new or preserved multi-family housing providing a minimum of 20% of housing at 80% of AML.

Key Partners:

- Mayor Keisha Lance Bottoms and City Council members
- A to-be-created “housing cabinet” drawn from public agencies heads and key private and nonprofit sector leadership, to be led by a Chief Housing Officer.
- Primary city housing agencies: City of Atlanta Dept of Planning, Invest Atlanta, Atlanta Housing, Atlanta Beltline Inc., Fulton Atlanta Land Bank Authority
- Private development community leadership
- Funders’ Collective leadership
- Key nonprofits and civic leadership: Enterprise Community Partners, Atlanta Neighborhood Development Partnership, City for All Housing Coalition

Outcomes (inversion from problem definition statement):

- A baseline inventory of public land owned across agencies
- Public investment decisions are determined by an overarching, strategic set of guidelines, including income targeting, geographical targeting, etc., as directed by a cross-agency, multi-sector “housing cabinet”
- Increased production and preservation to 2,500+ units annually
- Increased preservation of “naturally occurring affordable housing” (NOAH)
- Greater participation by the private development community
- Affordable housing is considered as critical public infrastructure

We are successful if (SMART metrics)

- 2,500+ units created or preserved annually
- \$25-35 million is raised annually in new and/or expanded sources (\$250-350 million over 10 years)
- \$250 million Housing Bond issued
- \$50+ million New Market Tax Credit investment created

Budget (all figures are estimates): TBD



Timeline (who is doing what by when): TBD.

	2018	2019	2020	Ongoing
Who	Mayor, HouseATL, agency heads ("cabinet")	Council, Mayor	Mayor, Council, Housing Cabinet	Mayor, Council, Housing Cabinet
What	Strategic funding plan & investment priorities set; baseline inventory completed Analysis of revenue options (see following exhibit)	Issue Housing Bond; NMTC set-aside; reg reforms to Council; any relevant tax package to General Assembly Establish Housing Trust Fund	New taxes implemented;	Assess opportunities for additional bond issuances, new funding sources to meet goals

Potential Housing Funding Sources for Further Analysis

Source	Description	How capital functions	Pros	Cons	Questions to Answer
One-Time					
General Obligation Bond	A bond passed by the voters at the municipal or county level to fund local infrastructure needs, including affordable housing.		<ul style="list-style-type: none"> Use and amount of funds could be crafted in referendum Tax exempt Express voter support & ability to pursue higher level of funding. 	<ul style="list-style-type: none"> Cost, time, political uncertainty. Challenge in persuading electorate that it is a collective benefit. Not annual, renewable Projects have to be listed on the ballot, less flexibility Tax exempt triggers great Federal regulation 	<ul style="list-style-type: none"> (1) What is revenue source for debt service payment? Assigned millage? (2) There is a cap. How much capacity remains? (3) Would you do housing only or couple with additional infrastructure?
Housing Opportunity Bond	Like a traditional private activity bond. Intergovernmental agreement - URFA issues bonds, City agrees to pay debt service, AHA is the implementing entity but contracts with URFA and Invest Atlanta to administer. Most likely taxable. There are no caps outside of City's bonding capacity and competing obligations.	<ul style="list-style-type: none"> Gap financing Currently as 1% - 3% repayable loan 	<ul style="list-style-type: none"> Does not require state/ legislative change; does not require voter approval Fully within mayor's purview 	<ul style="list-style-type: none"> Not dedicated, annual, renewable Significant fees/ friction in current structure. Loss of 20% (\$8M of \$40M) in fees of administration 	<ul style="list-style-type: none"> (1) What would be feasible in a next issuance? What level would trigger an increase in millage? (2) Can mayor require that 'friction' is significantly decreased to improve efficiency? (3) Flexibility in how funds can be structured (debt/ equity)? Could it be subordinated in a way that allows it to act more like equity?
Dedicated, Renewable - New, Expanded, or Repurposed					
Real Estate Transfer Tax (Local option)	A real estate transfer tax, also called a documentary stamp tax or real estate excise tax, assesses a tax based on the value of real property at the time of sale or transfer. Would involve increasing existing tax and dedicating for affordable housing. Makes the most sense to be approved at the county level as the Clerk of Superior Court is the collection agency.	Could be used to fund housing trust fund	<ul style="list-style-type: none"> Dedicated, renewable source Opportunity for regional/ sub regional strategy Fulton County estimates of \$45 - \$75M per year based on neighboring state rates 	<ul style="list-style-type: none"> Time, political uncertainty. Would have to be approved at General Assembly and passed at local level. Opposition from Realtors, with strong political lobby 	<ul style="list-style-type: none"> (1) Could the money be leveraged? (2) Can we quantify the impact/ feasibility if only administered in the City? (3) Does this simply take too long with too much risk?
Parking Tax	Commercial parking and/or per-space tax. Commercial parking is one that operators pay based on receipts or is built into the rate posted on parking. It can also be a tax on city-owned parking. The per-space fee is yearly fee paid by parking facility owners based on number of spaces or size of lot.	To housing trust fund?	<ul style="list-style-type: none"> Early estimates of \$13 - 30 million per year Speaks to different vision for future of City (e.g. City Design) 	<ul style="list-style-type: none"> Requires state enabling legislation 	<ul style="list-style-type: none"> (1) What additional work is required to make the connection between parking and housing? Should it be coupled with other uses to make the connection?
Sharing Economy Tax	A tax on Airbnb, Uber, Lyft, etc. Similar to the hotel tax.		<ul style="list-style-type: none"> New revenue source Airbnb would be from tourists/ not local Support from hotels, taxis Already an area of interest for the city 	<ul style="list-style-type: none"> Opposition from sharing economy interests Early estimates that Airbnb tax would generate less than \$5 million/ year. Not clear what car additions would be. 	<ul style="list-style-type: none"> (1) What is revenue potential if broader than Airbnb? (2) What additional work is required to make the connection between sharing economy and affordable housing? (3) Are there any legal issues with use of funds, similar to the hotel/ motel tax?
MOST-like Tax	A portion of the sales tax. Atlanta has the potential for 0.1% additional sales tax that would likely be used for arts if authorized. Potential for portion of the existing sales tax currently dedicated to sewer repair. It expires in 2020, presenting an opportunity to repurpose a portion of the tax for housing. Additional potential reallocation of the APS capital projects one cent for shared community development		<ul style="list-style-type: none"> Atlantans have shown support for sales tax for lots of other uses Dedicated, renewable Will growth with city's growth 	<ul style="list-style-type: none"> Challenging politics depending on which source. Competing priorities with infrastructure, early childhood education. Would require alignment of goals. Potential broad opposition (eg. First TSPLOST) 	<ul style="list-style-type: none"> (1) Would it be possible to couple housing with other community infrastructure needs (parks, transit, early childhood, other) for a shared funding source?
Property Tax	A dedicated portion of property taxes or additional levy. Amount varies widely. The 2009 Seattle housing levy raised \$145M over seven years.		<ul style="list-style-type: none"> Significant revenue potential Logical connection to housing and business 	<ul style="list-style-type: none"> Political climate of property tax increases or redirection Risk pitting housing against other key services (e.g. police and fire) 	<ul style="list-style-type: none"> (1) With assessments climbing and no decrease in mills, how is new revenue being allocated? (2) Could council could pass a resolution dedicating a percentage of the existing millage rate to housing?
New Markets Tax Credits	Federal equity contributions by investors to be combined with leverage debt sources to provide loan proceeds for the development of for-sale affordable housing.	Equity investors contribute 100% of funds at closing and take a pro rata credit against federal income taxes over a 7 year period.	<ul style="list-style-type: none"> High demand for investments in Georgia Flexible with other types of leverage financing (except for tax exempt bonds) 	<ul style="list-style-type: none"> Uncertainty regarding future of program 	



Recommendation: Prioritize underutilized and/or surplus publicly owned assets (land and buildings) for community and economic development projects.

Description:

- Develop a GIS database inventory of underutilized and surplus public assets.
- Identify publicly owned sites and potential public assemblages (multi-agency) in redevelopment areas and in high market value areas.
- Empower a local agency to lead a regular, cross-agency assessment of opportunities for development of affordable housing on public land.
- Engage community stakeholders early in the process.
- Create a policy to evaluate opportunities for affordable housing developments with new public facilities (i.e. libraries, fire stations, community centers, schools) and look for opportunities to share infrastructure (parking garages, common utilities)
- Reduce barriers/inefficiencies for land disposition for the development of AH
- Redirect suitable, underutilized and surplus public assets (land and buildings) for community and economic development purposes.
- Incentivize public-private partnerships through the investment of publicly owned land for projects that provide a public use and public benefit.

Key Partners: The State of Georgia, City of Atlanta, Atlanta Public Schools, Atlanta Housing, Invest Atlanta, ABI, Land Bank Authority, MARTA, Fulton County, DeKalb County. Additional partners may include utility companies, i.e. Georgia Power and other institutional owners. Data partners and consultative partners may include Atlanta Regional Commission, Georgia Tech, Georgia State, Urban Land Institute, and Enterprise Community Partners.

Outcomes (inversion from problem definition statement):

- Public land and other assets become a significant part of local funding strategy.
- In addition to MARTA and the Atlanta Housing Authority, agencies have adequately assembled and developable land for affordable housing
- Underutilized and/or surplus publicly owned land is used to promote the development of community and economic initiatives.

We are successful if (SMART metrics):

- A policy for priority and/or consideration is established across all public agencies is established in 2019.
- Use of public assets (land and facilities) generates 300 – 500 homes annually beginning in 2020.



Budget (all figures are estimates): TBD. Costs may include mapping resources and consulting for best practices.

Timeline (who is doing what by when):

	2018	2019	2020	Ongoing
Who	HouseATL Executive Committee, Mayor	HouseATL Executive Committee and Chief Housing Officer	Public partners	Chief Housing Officer
What	Identify point person for coordinating across agencies and data partner for mapping	Determine best practices in use of public assets and develop shared policy across agencies.	Delivering housing by leveraging publicly-owned assets. This will require projects being initiated in 2019.	Coordination across agencies and partners, ongoing monitoring of resources and opportunities for public assets to do "more than one thing" with housing being a key priority



Recommendation: Create a sustainable funding source with a specific and proportionate carve out for the production and preservation of affordable and permanent supportive housing serving households with less than 50% of the area median income.

Description:

- Acknowledges the need for dedicated, sustainable funding sources for the development and preservation of affordable housing in the City of Atlanta
- Acknowledges that the bulk of housing incentives administered by the City of Atlanta and related public agencies (Invest Atlanta, Atlanta Beltline, etc.) goes towards those making 60-80% AMI; while the bulk of the housing need in the City of Atlanta exists among households making less than 50% AMI
 - 22,960 unit deficiency to those making less than 50% AMI¹
 - 1,763 unit deficiency to those making 51%-80% AMI
- Acknowledges that future dedicated funding sources should be allocated proportionately, according to greatest need – i.e. households with under 50% AMI
 - Potential for dedicated funding for below 50% of AMI could leverage capital from other levels of government – e.g. National Housing Trust Fund
- Acknowledges that significant public subsidy is required in typical housing deal serving very-low and extremely-low income households; The market cannot deliver on its own
- The design (distribution) of a future funding source must reflect this growing and disproportionate need to increase inventory for very low and extremely low-income households.
- Leveraging the proposed public fund, vet additional opportunities to attract alternative capital providers, both philanthropic and private
- Potential uses include:
 - **Operating capital**² – for mission-based housing owners and/or service providers devoted to funding wrap-around services, particularly in permanent supportive housing developments.
 - **Acquisition/rehab capital** - Flexible, nimble for preserving NOAH and other at-risk subsidized properties. Could be in the form of a revolving loan fund³
 - **Predevelopment capital**
 - **Development incentives**

¹ Carpenter, Ann. "Affordable Housing Overview: Atlanta." HouseATL Taskforce Meeting, 20 February 2018

² Identified as a primary funding priority by group members

³ Fund should have clear loan terms and understanding of how often a developer may access the RLF in the course of a project



Key Partners:

- City of Atlanta
 - Mayor / Housing Cabinet (TBD)
- City Council
- State of Georgia
 - Department of Behavioral Health
 - Department of Community Affairs
- U.S. Housing and Urban Development (HUD)
- Mission-aligned developers, CHDOs, CDCs, homelessness service providers
- Partners for HOME
- Philanthropic Partners?
- Private Partners
 - CDFIs / Financial institutions
 - Future Opportunity Funds

Barriers & Outcomes Addressed:

- Existing equity and debt funding mechanisms, including subsidies, are limited, inflexible, and cumbersome
 - No dedicated municipal funding
 - Limited funding solutions that prioritize families/individual making less than 50% of the region's median income
- Mission-aligned housing developers, with the mission and expertise to serve this population, do not have the resources to scale up to meet the need
- City of Atlanta, Fulton County, DeKalb County, and its and community institutions (hospitals, schools, courts, etc.) take on significant costs to address adverse outcomes associated with substandard housing stock and households' lack of access to social services.
- Residents are increasingly disconnected from robust wrap-around services.
- Not enough housing developers are motivated to build for this market, which has the additional impact of stifling new opportunities for innovation.

We are successful if (SMART metrics)

- Creation of a dedicated, public funding source(s) created for sole purpose of increasing affordable housing supply, particularly for households at or below 50% AMI and for supportive housing development, in the City of Atlanta by 2020



- XX% of dollars reserved for those serving households making at or below 50% area median income *(TBD – align with assumptions made within forthcoming City's Housing Needs Assessment)*
 - XX% of these dollars reserved for extremely-low income individuals (30% AMI)
 - XX% of those dollars reserved for supportive housing development for individuals experiencing homelessness
- Increase housing production:
 - XX housing units created for households making 30-50% AMI by 20__ (year)
 - XX housing units created for households making <30% AMI by 20__ (year)
 - XX supportive housing units created for the chronically homeless by 20__ *(TBD – align with assumptions made within forthcoming City's Housing Needs Assessment)*
- Readily available and flexible source of operating capital to fund wrap-around services within housing developments, particularly permanently supportive housing developments
- Oversight body/commission for the fund includes proportionate representation from stakeholders (developers, service providers, or housing advocates) who serve the Under 50% AMI market

Budget (all figures are estimates):

Budget should align with Public Investment funding recommendation.

Waiting on City's Housing Needs Assessment to ensure alignment on current and future need.

Timeline (who is doing what by when):

	2018	2019	2020	Ongoing
Who	HouseATL members	HouseATL subset & City of Atlanta	City of Atlanta	
What	Build out unit count goal /dollar assumptions based on City of Atlanta's Housing Needs Assessment Identify sources of funds and legislative strategy for approval (see Public Investment recommendation)	City to convene cross-sector focus groups to weigh in on specifics of fund design as outlined above; identify opportunities for flexibility within funding	Launch fund	



Policy Recommendations



Recommendation: Develop comprehensive wealth building programs (e.g. pathways to ownership and financial literacy) for low and moderate-income residents and businesses in Atlanta’s predominantly Black and Brown neighborhoods experiencing significant investment.

- Entrepreneurship
 - Business plan design, mentor-mentee programs, access to capital, next level business growth training, managing books, investing for growth
- Homeownership
 - Basics of homeownership, creating a realistic budget prior to purchase, property taxes, foreclosure prevention, funding options for first time buyers
- Financial education and literacy
 - Workshops, coaching, banking services, free tax prep, credit improvement, total financial health, IDAs
- Increased job opportunities
 - Engage local job training programs, scale to support neighborhood residents, options for training stipends, barrier elimination, access to jobs in growth industries
- Explore funding opportunities to support wealth building in a large, scalable way
 - CRA?, Public/private?

Description:

- Prioritize low and moderate-income residents and businesses in Atlanta’s predominantly Black and Brown neighborhoods experiencing significant investment
- Expand definition of CRA for local banks to more broadly include these programs
- Financial education and literacy for families and small businesses, including budgeting, savings, and credit
- Recommit resources to the whole family and financial health to help build generational wealth
- Leverage Atlanta Legal Aid’s generational wealth program for homeownership and foreclosure prevention
- Leverage Grove Park Foundation’s job training stipend IDA program that gives individuals in low-paying jobs access to job training that will increase their earnings and move them up the economic ladder.

Key Partners:

- The Center for Working Families
- Annie E. Casey
- Federal Reserve Bank of Atlanta

S.M.A.R.T. – specific, measurable, attainable, relevant, and time bound



- TransFormation Alliance
- Partnership for Southern Equity
- Urban League of Greater Atlanta
- Local financial institutions
- Atlanta Wealth Building Initiative
- Atlanta Land Trust
- Georgia Watch
- United Way
- Georgia Budget and Policy Institute
- GA Act
- Bank on Atlanta
- MicroEnterprise Network
- Westside On the Rise
- Atlanta Legal Aid
- Grove Park Foundation

Outcomes (from problem definition statement):

- Addressing that Atlanta is losing its social fabric as predominantly black and brown residents are displaced and we lose social and cultural assets.
- New residents enter a community with awareness of, and regard for, the history and ongoing relationships of the neighborhood, and are not educated or encouraged to create connections that will strengthen the social fabric.
 - This pattern of behavior encourages legacy residents to resist new investments as they have learned that change usually means their eventual displacement.
- Low-and moderate-income residents reap the benefits of improved access to opportunity schools, mobility, jobs).
- Naturally occurring affordable housing and standard housing is being maintained and preserved.

S.M.A.R.T. – specific, measurable, attainable, relevant, and time bound



Recommendation: Provide property tax relief for affordable housing that meets designated criteria.

Description:

Create a property tax abatement or exemption program to provide property tax relief for existing homeowners as well as affordable housing produced or preserved, meeting specific criteria.

This recommendation is to provide beneficial tax policy that will improve opportunities to entice ownership and/or preservation of affordable housing. The policy enhancements will include:

- Establishment of tax abatement policy modeled after the TN PILOT program. Allows for extended period of reduced tax rate paid via PILOT. Consideration of LBA, Invest Atlanta, and Atlanta Housing as potential public entities for pilot of program.
- Creation of mechanism for affordable property owners to opt into restrictive programs that provide for reduced tax rate, as long as, property is used for affordable housing based on the AMI served. Both for existing owners, and new owners; potential for a portion or all of the units to be affordable.
- Utilize targeted geographic zones based on Urban Enterprise Zones with a focus on housing. Ensure that property tax incentive is available in high opportunity areas in addition to areas in need of revitalization.
- Creation of temporary anti-displacement tax fund modeled after Westside anti-displacement tax fund focused on additional targeted neighborhoods experiencing gentrification. The focus would be for temporary relief for rental owners for maximum of 24-36 month until more permanent policy solutions are in place.
- Develop a longer term sustainable public policy solution that may include tax "circuit breakers" or a more fundamental restructuring of tax policy for homeowners.

Key Partners:

- City of Atlanta
- Invest Atlanta
- Atlanta BeltLine Inc.
- Fulton County Tax Assessor
- Fulton County
- DeKalb County
- State of GA Legislature
- GA ACT
- Enterprise Community Partners
- GA Affordable Housing Coalition
- Atlanta Apartment Association
- Westside Future Fund

S.M.A.R.T. – specific, measurable, attainable, relevant, and time bound



Outcomes (from problem definition statement):

This recommendation seeks to proactively address the following negative results outlined in the Preservation Working Group’s problem definition statement:

- Individuals moving out of the city to a cheaper market increases commute time, adds to traffic, and lost productivity
- Inability to pay rent leads to transiency (move outs and evictions) which has a major impact on schools and educational attainment.
- We are rapidly losing our low-wage workforce because they cannot afford to live in the city – rents are increasing at a rate higher than incomes.
- Creating concentrations of poverty – often in suburban areas.
- Other negative impacts on schools, health and air quality, inequality, and homelessness.
- Loss of social fabric, vibrant communities, and diversity in neighborhoods.

We are successful if (SMART metrics)

- State legislation is passed to provide for targeted tax relief for properties used for affordable housing based on identified qualifying criteria.
- The annual rate of decline or loss of NOAH properties is measurably slowed.
- Existing owners of affordable housing retain ownership and continue to use the property for affordable housing instead of converting to market.
- Mission driven non-profits and for-profits increase their portfolios of actively managed affordable housing.

Budget (all figures are estimates):

TBD

Timeline (who is doing what by when):

	2018	2019	2020	Ongoing
Who	Coalition that minimally includes City of Atlanta, Fulton County, GAACT, Enterprise; lobbying entity.	Ga State Legislature Fulton County Tax Assessor		
What	Submit recommended legislation to State Legislature for consideration during 2019 session.	Pass recommended legislation during 2019 Session. Implement new tax policy for reduced assessment		

S.M.A.R.T. – specific, measurable, attainable, relevant, and time bound



Recommendation: Target reforms in the local housing regulatory system to create cost savings and boost production.

Only state and local regulations that can be changed by local action are addressed.

Description:

- Will result in reduced taxpayer subsidy and an environment more conducive to private sector development and investment in affordable housing.
- Zoning - outline existing zoning challenges and levers to reduce cost and create more affordable housing.
 - Eliminating parking minimums, particularly in areas with public transportation and those where a less car-centric environment is desirable;
 - Reducing minimum unit sizes;
 - Allowing ADUs and rental units on residential single-family lots; and
 - “By right” development rights provided that development reflects existing, approved community plans. Should allow for sufficient density appropriate to the neighborhood. Should clearly outline design standards. If allowable use and design are very clear, then developers can accurately plan and move forward with a deal more efficiently.
- Process –
 - Expedite public engagement process coupled with community education on housing and land use and a focus on quality design.
 - Recommend changes to City permit process to streamline building permitting and inspections process and relieve time delays and cost prohibitive impact fees. No one single process; rather, coordination to make the overall permitting and inspection process more predictable in time required, expense, and outcome. Specific ideas for consideration include:
 - A more efficient review system
 - More use of combination inspectors who would have more field authority over minor plan changes that do not have significance from a zoning perspective and are allowed by building code. Currently inspectors push change approvals back to the permitting dept for approval at great cost in time and overhead.
 - Individual lot storm water management to allow more infill lots to be accommodated by existing conditions
 - Consider allowing third-party party inspections from licensed engineers
 - Lower permitting costs for affordable housing units
 - Consideration for expedited permitting for developments that reach deeper levels of affordability
 - Consideration of a separate code for the rehab of existing properties.

S.M.A.R.T. – specific, measurable, attainable, relevant, and time bound



- Public Funding and Process:
 - Better align funding applications, timelines and approval process on financing and underwriting [note that this is addressed with the Chief Housing Officer and the Funders' Collective recommendations].
 - Utilize technology solutions to streamline funding compliance. This could be modeled off of the Seattle model and/or leverage local innovations from the tech sector.
 - Local governments can subsidize land assembly for affordable housing. Ideas could include:
 - Assemble, improve infrastructure, and sell or contribute (NOTE: if target is 50%, free land is mandatory unless vouchers involved) into the deal at a fixed percentage of value based on rent or for-sale. Assemble and subsidize land during improvement and construction and take percentage on the back end.
 - Promote ground lease structure to ensure permanent affordability or put into a Community Land Trust (Atlanta Land Trust)
 - Create a revolving fund which buy tax liens from the county, acquires previously sold tax liens, and negotiates purchase of key parcels. A use of part of this fund would be to clean titles.
 - Fund the acceleration of the process of judicial en rem foreclosure to acquire land and buildings and to reduce blight, particularly if assembly is possible. (
 - Facilitate the acquisition of existing properties where little or no rehab is necessary, particularly in allowing flexibility re income restrictions on existing tenants.

Key Partners:

- CoA Department of City Planning
- Development Community
- Home Builders
- Atlanta Land Trust
- Neighborhood Planning Units

Outcomes These recommendations are designed to address the barriers outlined in the working group problem definition statement:

- Increased production and preservation to 2,500+ units annually
- Increased preservation of “naturally occurring affordable housing” (NOAH)
- Greater participation by the private development community in creating affordable housing

We are successful if (SMART metrics)

- Zoning recommendations are incorporated into the City of Atlanta zoning rewrite.

S.M.A.R.T. – specific, measurable, attainable, relevant, and time bound



- Funders' Collective and Chief Housing Officer create single application and streamlined compliance by end of 2019.
- Community education campaign is launched in 2019.

Budget (all figures are estimates): TBD for technology solutions for common app and common compliance

Timeline (who is doing what by when):

	2018	2019	2020	Ongoing
Who/ what	City of Atlanta communicates process to incorporate key items into City of Atlanta zoning rewrite	Funders' Collective and Chief Housing Officer create single application	Funders' Collective and Chief Housing Officer finalize single compliance	
What/ what		Community Education campaign launched by key partner identified by HouseATL Executive Committee		
Who/ what		HouseATL identifies technology/ data partners and best practices for common app and common compliance		

S.M.A.R.T. – specific, measurable, attainable, relevant, and time bound



Recommendation: Expand availability of short-term and emergency solutions to combat rising evictions in the City of Atlanta and prevent families from entering homelessness

Description:

- Fully fund and staff a full time legal representative and social service representative at the Housing Court Assistance Center at the Fulton County Courthouse to ensure individuals facing eviction are connected to legal resources so that evictions can be prevented, delayed and/or mitigated.
- Create a fund to allow the Continuum of Care to fully staff and provide temporary financial support to prevent and divert families from entering homelessness
- Mitigation strategy that also ensures at-risk households are connected to relevant services depending on situation (financial health counselor, social services, etc.)
- Leverage existing and emerging technologies that can easily track evictions as soon as they are filed to ensure prompt notifications of affected parties and pairing of available legal resources (via the Housing Court Assistance Center). Expand upon and widely publish list of organizations offering short-term rental assistance.
- Longer term goals should include charting a legislative strategy for stronger tenant protections in the State of Georgia
- Explore opportunities to engage landlords on alternatives to evictions; conduct listening sessions with “worst offender” landlords to better identify solutions to decreasing filing rates in Atlanta.
- Work broadly with City of Atlanta property owners and manager on flexibility on rent due dates to align with pay schedules.

Key Partners:

Housing Court Assistance Center

- Atlanta Volunteer Lawyers Foundation (AVLF)
- Partners for HOME/HomeFirst (PFH)
- Lawyers Equal Justice
- Georgia State University College of Law
- Fulton County Magistrate Court
- Faith-based Community
 - Buckhead Christian Ministries
 - Midtown Assistance Center
- Philanthropic Community
 - Current partners: Eversheds Sutherland, RentPath Gives Back



Short-term/ Emergency Assistance Fund

- Partners for HOME/HomeFirst
- Philanthropic community

Barriers and Outcomes Addressed:

- Homelessness and/or transiency rates do not increase, mitigating the greater poverty and often a multigenerational poverty cycle.
- City of Atlanta, Fulton County, and its and community institutions (courts, hospitals, schools, etc.) take on less costs to address adverse outcomes of lack of housing
- Families and individuals are not displaced from their community and do not have increased cost burdens (transportation costs, un/under employment costs).

We are successful if (SMART metrics)

Tenant Housing Court Assistance Center

- Housing Court Assistance Center can be fully staffed¹ by first quarter of 2019
- Hire a social service representative to be staffed at the Housing Court Assistance Center by the first quarter of 2019.
- Those facing eviction have expanded access to free legal advice to better understand their rights and options under Georgia law.
- Housing Court Assistance Center offers expanded hours for tenants including some evening hours (NOTE: Cannot be extended beyond the hours of the courthouse).

Short-term and Emergency Assistance Fund

- Divert at least 500 families from homelessness through fund proceeds by 2020

Budget (all figures are estimates):

See Exhibit A for complete details and assumptions

Tenant Housing Court Assistance Center -

- Three part-time attorneys annually to include attorney staffing and administrative costs

Short-term and Emergency Assistance Fund

- Two full-time case managers to work on diversion, housing navigation and financial assistance
- Flexible pool of funds to assist with first month's rent, utility arrears, security deposits, landlord incentivization

¹ As outlined in the Exhibit A

S.M.A.R.T. – specific, measurable, attainable, relevant, and time bound



Timeline (who is doing what by when):

	2018	2019	2020	Ongoing
Who	AVLF/PFH	AVLF/PFH	AVLF/PFH	City / Philanthropic Partners
What	Creating budget and staffing plan; PFH/HomeFirst will seed startup costs and first 3 years of fund	Hire attorneys and case managers. Begin project and rental assistance funds with referrals from coordinated entry and self-help legal clinic. Expand and scale; need additional funds to scale project. AVLF and PFH will implement	Scale program and evaluate	Need support to scale and leverage investment

S.M.A.R.T. – specific, measurable, attainable, relevant, and time bound



Housing Court Assistance Center at a Glance October 3, 2017 until June 18, 2018

Budget:

Current Staff: **One part-time Staff Attorney**
Paid Hours: 240 (6 hours per week)

- Total Hours in Operation: 240
- Hours of Operation: 9:00am until 12:00pm, every Tuesday and Wednesday

Estimated Hours Spent on Work Outside Hours of Operation: 190 (19 hours per month)

- This figure is an estimate based on monthly averages. Those monthly hours consist of:
 - Preparation Time (1 hr p/m)
 - Trainings and Volunteer Recruitment (1.5 hr p/m)
 - Completing Monthly Reports (8 hr p/m)
 - Data Entry (4 hr p/m)
 - Creation and Maintenance of HCAC Website (.5 hr p/m)
 - Development (in progress) of Mobile App (not added – began in July)
 - Hours Spent at the HCAC after 12:00pm (4 hrs p/m)
 - HCAC has never turned a tenant away due to hours. The HCAC has remained open until 1:30 - 2:00pm at times to ensure that no one is turned away

Number of Individuals Assisted by the HCAC: **485**

- Visitors within scope of HCAC

Number of Individuals Impacted by the HCAC: **1,143**

- (Co-tenants and family members of those assisted)

Outcomes – October 2017 until July 31, 2018

Total fees and rent claimed by Landlords:	\$570,111.49
<u>Total amount Landlords have received in judgments:</u>	<u>\$291,224.36</u>
Difference =	\$278,887.13
Amount returned to tenants per HCAC hour =	\$1,239.50

Consent Agreement – 158 (36.4%)

Dismissal W/O Prejudice – 62 (14.3%)

Advice Provided (General) – 57 (13.1%)

Judgment for Landlord – 47 (10.8%)

Judgment for Tenant – 32 (7.4%)

Default Judgment (for Landlord) – 35 (8.1%)

Referred to Other Source for Legal Help – Pre-Litigation – 17 (3.9%)

Appeal – 13 (3.0%)

S.M.A.R.T. – specific, measurable, attainable, relevant, and time bound



Proposed Staffing Plan

Objective:

To ensure that all Fulton County tenants facing eviction have the opportunity to meet with a competent, well trained, and accessible attorney for assistance. The annual rate of decline or loss of NOAH properties is measurably slowed.

Means:

Tenants should be able to meet with an attorney at any time during business hours (Monday through Friday, 9:00am until 4:00pm). Tenants that arrive to file an Answer to their Dispossessory Summons should be able to this attorney during the ordinary course of their journey through the court system. For this reason, the attorney or attorneys should be located within the Magistrate Court Clerk's Office so tenants may seek assistance while they are at that location filing an Answer.

As a secondary matter, in order to best serve tenants, attorneys must treat each tenant with the utmost respect. Attorney exposure to tenants must be manageable to avoid front-line burnout/compassion fatigue. Several part-time attorneys on staff will also ensure that institutional knowledge and continuity of service is not lost if an attorney leaves a staff position.

Attorneys should track data and outcomes to ensure that they are conducting their work in the most efficient manner possible. Attorneys should also look for trends, so they can assist policymakers with their existing eviction mitigation work.

Staffing Structure:

The Housing Court Assistance Center should have one part-time managing staff attorney, two part-time staff attorneys, and two full time case managers.

Part-Time Managing Attorney: The managing attorney will oversee the Housing Court Assistance Center. This managing attorney will be responsible for training volunteers and the other two part-time staff attorneys, compiling monthly reports, maintaining the HCAC website, writing a scholarly article, and all other tasks outside of work at the HCAC. The managing attorney will also work at the HCAC window for three, three-hour shifts (nine hours total per week).

Part-Time Staff Attorneys: The two part-time staff attorneys will report to the managing attorney. They will work at the HCAC window for three, three-hour shifts (nine hours total per week). One staff attorney may work twelve hours per week to ensure total coverage, depending on volume.

Full-Time Case Managers: The two full-time case managers will staff the HCAC for its entirety. Case managers will work on diversion, housing navigation and financial assistance

S.M.A.R.T. – specific, measurable, attainable, relevant, and time bound



Proposed Budget

Staff Total = \$11,700.00 per month; \$140,400 per year

- Part-time Managing Attorney = \$2,000 per month (approx. \$35.00 per hour)
- Part-time Staff Attorneys (2) = \$2,200 per month (approx. \$30.00 per hour)
- Full-time Case Managers (2) = \$7,500 per month (approx. \$45k / year each)

Technology (website and/or app) = \$867.00 per year

- Domain Name/Hosting (godaddy.com) = \$175.00 per year
- Monthly Website Maintenance (Squarespace) = 16.00 per month
- App development/hosting (projected) = \$500.00 per year

Supplies = \$1,000.00 per year

- Paper, pens, printing = approx. \$85.00 per month

Host Agency Administrative Costs: \$10,453 (20%)

- Malpractice coverage, supervision, training, payroll processing

Subtotal (Housing Court Assistance Center): \$152,720 per year

Additional Temporary Financial Assistance Fund¹ = \$632,235

- Flexible pool of funds to assist with first month's rent, utility arrears, security deposits, landlord incentivization

Subtotal (Temporary Financial Assistance Fund): \$632,235 per year

¹ Funding will be part of the overall approach but not necessary managed by the Housing Court Assistance Center.
S.M.A.R.T. – specific, measurable, attainable, relevant, and time bound



Recommendation: Adopt new zoning regulations to ensure affordable housing solutions, including new innovations, are zoning and code compliant and scalable in Atlanta.

Description:

- Define four non-subsidized housing solutions which address a range of incomes, unit sizes, and neighborhood types:
 - co-living in single family homes
 - increasing density on single family lots through Accessory Dwelling units, quads, or cottage courts
 - micro-units in multi-family developments
 - multi-family co-living
- Outline existing zoning restrictions and challenges, and present recommendations for new zoning ordinance language, as well as create a zoning category for an Overlay District. The Overlay District could be applied to any property/zoning category within prescribed areas with access to transit or proximity to employment centers (thus enabling affordability on multiple levels).
- Provide recommendations for changes to City permit processing, to relieve time delays and cost prohibitive impact fees.
- Provide case studies and ideas for floor plans and architecture, to assist a developer or homeowner in implementing any of the 4 solutions.

Key Partners:

- City of Atlanta Department of Planning
- Urban Land Institute TAP Committee
- Affordable housing developers and owners
- High net worth individuals and their advisors/ managers

Barriers and Outcomes Addressed (inversed from problem statement):

- Affordable housing production is flat or increasing.
- Low and moderate-income residents have more options.
- New housing stock is serving a broader cross-section of the market.
- Private investment's ability to produce workforce housing is increasing, bolstering Atlanta's economic competitiveness.
- Regulatory environment does not stifle opportunities for product innovations

We are successful if (SMART metrics):

- City of Atlanta adopts overlay district template by 2019
- 3 other jurisdictions in metro Atlanta adopt overlay template by 2020
- 100 units or more of privately funded, affordable housing are created by the market by YE2020 in metro Atlanta similar to the concepts outlined in the zoning overlay.

S.M.A.R.T. – specific, measurable, attainable, relevant, and time bound



Budget (all figures are estimates):

- Upfront legal costs: \$20k to jurisdiction if ordinance is written
- Overhead to run: NA
- Other: NA

Timeline (who is doing what by when):

	2018	2019	2020	Ongoing
Who/ What	ULI Task Force to produce overly district template			
Who/ What	ULI Atlanta members to present to Atlanta area stakeholders	City of Atlanta to adopt overlay district template		
Who/ What			Other jurisdictions to adopt overlay district template	

S.M.A.R.T. – specific, measurable, attainable, relevant, and time bound



Recommendation: Invest in a government affairs strategy targeting state and federal housing policy reform, alignment with HouseATL recommendations and priorities.

Description:

- Two-fold strategy as follows:
 1. Engage a lobbyist with expertise in housing policy and finance. Primary focus will be to elevate and advocate for policy and funding recommendations (from HouseATL and otherwise) that may require a change in State law
 2. Identify policy recommendations at the local, state, and federal agency level that would optimize the alignment and coordination of resources across various agencies and jurisdictions to support families and individuals with 50% or below of the area median income
 - DCA (LIHTC, State Housing Trust Fund, National Housing Trust Fund, CDBG, etc.)
 - City (CDBG, HOME funds, 4% tax credits, etc.)
 - City's Inclusionary Zoning In-Lieu of Payments

Additional Input:

- Approach:
 1. Consider a multi-jurisdictional strategy for needed state-level reform. Involve GMA and other cities including, for example, Macon, Columbus, Savannah, Augusta, Valdosta. GMA or Georgia ACT might be good partners who already have the multi-jurisdictional relationships.
 2. Work in close coordination with the City of Atlanta government affairs team.
 3. Do our homework. Invest in legal research/strategy to develop and even draft legislation for new funding sources such as, perhaps, "new" taxes, discounts for non-profits to purchase land at tax sales, increases/augmentation of affordable housing trust fund, others. Invest in legal research/strategy to develop any "new" funding options possibly available at local level including new bonds, other sources that may need public referendum and others that may not. Partners might include Georgia ACT, Kutak Rock LLP. We don't just need resources to lobby, we need resources to research, develop, write and work-shop actual pieces of legislation that meet constitutional and state-law muster
- Potential Priorities. Based on other recommendations within HouseATL, potential priorities could include:
 1. Partner with DCA to evaluate how the City of Atlanta can compete for more 9% LIHTC investment beyond the current Atlanta three project max.
 2. Advocate for priority to go to projects in the City of Atlanta that have deeper levels of affordability and/or are committed to long-term affordability.

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3. Work with the state legislature to reverse its prohibition of source-of-income protection ordinances, allowing the City of Atlanta to adopt such an ordinance
4. Identify state laws that can address sustainable property tax policy, including “circuit breakers” or a more fundamental restructuring of tax policy for homeowners
5. Work with state leadership to expand the state housing trust fund proportionate to state population and needs (e.g. \$3 million in Georgia for 10.5 million people; \$200 million+ in Washington state for 7.5 million people). This should include vetting sustainable funding streams.

Key Partners:

- City of Atlanta Mayor’s Office & Office of Housing
- Invest Atlanta
- Atlanta Housing
- Atlanta Beltline
- Atlanta City Council
- Georgia State Representatives and State Senators
- State of Georgia – Department of Community Affairs
- Georgia ACT
- Affordable housing developers and owners
- Partners for HOME
- Additional HouseATL participants

Barriers and Outcomes Addressed:

- There is a lack of understanding and a shared perspective on how to address housing affordability across income bands (i.e. very low income to workforce).
- Available resources/ funding is not streamlined and does not “play well” with others.
- Misalignment of incentives between funding agencies, property owners, and tenants.
- Low and moderate-income residents have fewer and often inferior options.
- New housing stock is largely serving the high-end of the market.
- Regulatory environment stifles opportunities for product innovations and new supply

We are successful if (SMART metrics):

- City of Atlanta adopts relevant HouseATL recommendations into 2019-2020 Legislative Package
- Existing funding sources are optimized and better aligned to support families and individuals with 50% or below of the area median income
- Existing dollars are proportionately used to impact the greatest housing need (i.e. Under 50% AMI)

S.M.A.R.T. – specific, measurable, attainable, relevant, and time bound



Budget (all figures are estimates):

- City lobbyist / personnel: TBD
- Other: TBD

Timeline (who is doing what by when):

	2018	2019	2020	Ongoing
Who/ What	Engage housing lobbyist in advance of 2019-2020 session	City/HouseATL leadership to meet with Atlanta delegation (and others legislators) to share HouseATL recommendations		
Who/ What	HouseATL leadership identify recommendations that would require state law change			
Who/ What	Convene cross-jurisdictional group of city/county, state, and federal agencies to identify areas of optimization			

S.M.A.R.T. – specific, measurable, attainable, relevant, and time bound



Communications Recommendations



Recommendation: Develop and fund renters rights programs and education campaigns

Description:

- Protect and advocate for tenants' rights against unscrupulous landlords, especially in lower income neighborhoods starting to transition (look to the AVLF's Stand with our Neighbors Program) especially with a focus on displacement and school mobility.
- Targeted know-your-rights education campaigns and eviction diversion demonstration projects that combine legal services and negotiated emergency rental assistance to prevent evictions, as well as integrate financial literacy programs to help stabilize the home.
- Support existing courthouse-based tenant assistance centers for eviction calendars to enable them to be open five days a week (currently only 2 days/week).
- Support increased direct representation of tenants facing involuntary displacement.
- Identify real-time monitoring and analyzing of prevalence of evictions by neighborhood to inform targeted anti-displacement collaborative efforts.
- Address the role that criminal history checks play in displacement of legacy residents when rental apartment complexes are rehabilitated in transitioning neighborhoods, including but not limited to direct advocacy with landlords, expungement assistance and policy change.
- Address common causes of the displacement of legacy residents that occurs when rental apartment complexes are rehabilitated in transitioning neighborhoods.
- Implementation of the tool through the Displacement Free Zone's to guide strategic policies including preference for residents within DRZ (displacement risk zones) for housing vouchers in new Atlanta Housing developments.
- Leverage an existing program or fund for eviction-specific mitigation that links tenants to services so that landlords understand the cause of the inability to pay (i.e. unexpected medical bills, high utility bills, etc.)

Key Partners:

- AVLF
- Georgia Watch
- Enterprise Community Partners
- The Center for Working Families
- Federal Reserve Bank of Atlanta (eviction data)
- Eviction Lab (Matt Desmond)

S.M.A.R.T. – specific, measurable, attainable, relevant, and time bound



- Atlanta Legal Aid
- Fulton Co.
- Atlanta Housing
- Housing Justice League
- GA Justice Project
- Partners for HOME
- Department of City Planning
- Bank on Atlanta
- Religious and civic organizations: Buckhead Christian Ministry, Midtown Alliance, and Salvation Army

Outcomes These recommendations are designed to address challenges identified from the problem definition statement:

- Atlanta is losing its social fabric as predominantly black and brown residents are displaced and we lose social and cultural assets.
- New residents enter a community without awareness of, or regard for, the history and ongoing relationships of the neighborhood, and are not educated or encouraged to create connections that will strengthen the social fabric.
 - This pattern of behavior encourages legacy residents to resist new investments as they have learned that change usually means their eventual displacement.
- Low-and moderate-income residents do not reap the benefits of improved access to opportunity schools, mobility, jobs).
- Naturally occurring affordable housing and standard housing is being lost and not being replaced by permanently affordable housing.

S.M.A.R.T. – specific, measurable, attainable, relevant, and time bound



Recommendation: Expand understanding among regional leaders, policy makers, and professionals on how to address housing affordability across income bands (i.e. 0- 120 % AMI) through educational resources and case studies highlighting successes and results.

Description:

- Affordable and workforce housing is a complicated sector that is difficult for many to navigate. There is lack of a common definitions of the problem(s) and confusion over which solutions can be effective in addressing which needs.
- Developers, funders, lenders, and policy makers would all benefit from expanded resources.
- Establish an online resource for Atlanta-specific research and links to national resources on affordable housing. This could be the long-term functionality of the HouseATL website.
- Develop glossary of terms and one-pagers on complicated issues.
- Develop communications tools to map solutions to specific affordability problems.
- Develop case studies of local and national projects highlighting lessons learned and critical success factors.
- Create a regular communication around local innovations and successes.
- Launch resource around a housing forum or some other regional housing event in collaboration with key partners.
- Demonstrate framework of impact fund.

Key Partners:

- ULI Atlanta, its members, and ULI Terwilliger Center
- Enterprise Community Partners
- Community Foundation for Greater Atlanta
- City for All
- Metro Atlanta Chamber (business education)
- Atlanta Regional Commission (ARC)
- GA Act
- Universities (Emory, GA State, ARC, GeorgiaTech)
- Center for Civic Innovation (CCI)
- TransFormation Alliance
- NeighborWorks

Outcomes this Addresses (from problem definition statement):

- There is a lack of understanding and a shared perspective on how to address housing affordability across income bands
- Local philanthropy has not had a workable template to engage and prioritize affordable housing

S.M.A.R.T. – specific, measurable, attainable, relevant, and time bound



- The case has not been made that quality, affordable housing is tied to and a means to other shared goals (health, education, economic mobility)
- There is constrained capacity and lack of understanding to utilize existing capital available for affordable housing.
 - Complexity of capital structure, including various streams of funding for affordable housing – is something private capital doesn't understand, nor does the fast pace of their deals allow for such due diligence.

We are successful if (SMART metrics)

- Developed initial content and structure for online resource by December 31, 2018;
- Host regional housing event/ forum by July 31, 2019;
- Create structure for ongoing content and case study development;
- Develop program for ongoing housing communications focused on innovations, announcements, and successes.

Budget (all figures are estimates):

- Costs to develop communication tools: \$75,000 (est.)
- Cost to maintain site: \$25,000 - \$50,000 annually (depending on staffing approach)
- Other:

Timeline (who is doing what by when):

	2018	2019	2020	Ongoing
Who/ What	ULI Atlanta shares and refines glossary of terms, compiles existing case studies, local research and relevant national research	ULI Atlanta to host a regional forum on affordable housing		Host an annual HouseATL "reunion" to highlight successes, share best practices, and see what is being implemented on the ground.
Who/ What	HouseATL identifies ongoing data partner(s)	Enterprise Community Partners/ Funders' Collective shares case study results		
Who/ What	HouseATL website launched to 'house' educational resources			

S.M.A.R.T. – specific, measurable, attainable, relevant, and time bound



Recommendation: Launch a focused outreach campaign about Tenant Based Voucher Programs aimed at apartment owners and property managers to encourage higher participation and acceptance.

Description:

- There simply are not enough available units (particularly 1-2 bedroom) in the City of Atlanta for families holding vouchers. As a result, many voucher-holders are forced to port to neighboring jurisdictions or relinquish their voucher.
- Need larger, corporate landlords with sizeable portfolios to begin making units available to voucher holders.
- Need more units in areas of opportunity to allow voucher holders choice in where they live, especially where small area fair market rent exceeds area-wide rents.
- A marketing and outreach campaign aimed at strengthening relationships between apartment developers/landlords and voucher providers (AHA, faith-based community, etc.)
- Stakeholder meetings should aim to provide an opportunity for landlords to share existing barriers and/or concerns with accepting vouchers. Similarly, these stakeholder meetings would provide an opportunity for voucher providers to share the benefits of accepting vouchers, explaining how the program works, how landlords obtain a favorable return on investment by renting to voucher holders, and how to participate could increase opportunities and mobility for families receiving housing subsidy.
- Explore possible incentives that may offset or address landlord concerns. (e.g. Risk Assurance Pool offered through Atlanta Real Estate Collaborative (AREC))
- Follow-up meetings with other related stakeholders should be considered to address identified barriers – e.g. meetings with lenders to address why vouchers could not be used to meet developer’s inclusionary zoning requirements

Key Partners:

- Atlanta Housing
- Atlanta Apartment Association
- Mayor’s Office of Housing
- Atlanta BeltLine Inc.
- Invest Atlanta
- Atlanta REALTORS © Association
- Empire Board of Realists
- Georgia ACT
- City of Atlanta CIDs
- Public relations / communications company
- Atlanta Real Estate Collaborative (AREC) / OpenDoors ATL
- Faith-based community
 - Buckhead Christian Ministries

S.M.A.R.T. – specific, measurable, attainable, relevant, and time bound



Barriers and Outcomes Addressed (inverted from problem statement):

- Low and moderate-income residents have more housing options.
- Households receiving subsidy do not end up displaced from desirable neighborhoods or the City due to the lack of available units.
- Property owners and managers are informed about the Housing Choice Voucher Program – e.g. how the program works, the benefits, and how to participate.
- There is an increased number of units available to voucher holders in their preferred neighborhoods across the City of Atlanta.
- Reduced stigma of renting to Housing Choice Voucher holders

We are successful if (SMART metrics):

- Identify roles and timing of a coordinated campaign by December 1, 2018.
- Increase number of units available to voucher holders across the City, especially areas of opportunity, by 1,000 by December 31, 2019.
- Voucher holders are able to find appropriately sized units in their preferred neighborhoods across the City of Atlanta.
- Wait times for voucher utilization decrease from several months to days or weeks.
- Reduces transiency and increases stability from Atlanta Housing Choice Voucher recipients.

Budget (all figures are estimates):

\$50,000 (or less)

Timeline (who is doing what by when):

	2018	2019	2020	Ongoing
Who	AH, Mayor's Office, Invest Atlanta, ULI, Apartment Association, Open Doors	AH, Mayor's Office, Invest Atlanta, ULI, Apartment Association, Open Doors	N/A	N/A
What	Planning	Launch campaign with goal of ending by 2019	N/A	N/A

S.M.A.R.T. – specific, measurable, attainable, relevant, and time bound



Community Engagement Recommendations



Recommendation: Develop processes and programs that support inclusive decision making in a Beloved Community setting, which reflect the core values outlined in the City's [Design Book](#):

- Equity
- Nature
- Progress
- Access
- Ambition

Description:

- In order to address civic displacement and larger social barriers, develop programs and processes that elevate and preserve neighborhood culture and social structures
- Programs could include:
 - An “Arrive with Respect” campaign to help new neighbors assimilate in historically black neighborhoods while developing a deeper understanding and appreciation for the culture and civic infrastructure.
 - Create and launch a campaign to invest in arts and culture strategies, as well as green/urban infrastructure, to highlight the existing assets and history of Atlanta’s neighborhoods.
 - Leadership training for neighborhood association leaders on racial equity and inclusive economic development
 - Pilot and scale use of Equity Evaluator to give residents a data-based tool to evaluate proposed developments
- A new process could be an Atlanta version of Seattle’s Racial Equity Toolkit across all city departments. This tool is used in Seattle’s comprehensive development plan.
- Explore Community Benefit’s Agreements that are created in collaboration with organizations and individuals in communities at risk of displacement. The City of Portland offers a guide in their 2015 Comp Plan Update:
 - After conducting an Affordability and Displacement Impact Analysis the City should require developers of new developments to enter into Community Benefits Agreements which are: 1. Directly responsive to mitigation needs identified by the Impact Analysis; 2. Negotiated prior to permits being issued; 3. Legally binding; and 4. Created in collaboration with organizations and individuals embedded in communities at risk of disparate and adverse impact by the development in question.
- Engage youth more across all processes.

S.M.A.R.T. – specific, measurable, attainable, relevant, and time bound

**Key Partners:**

- OneAtlanta, the mayor's office of equity, diversity, and inclusion
- TransFormation Alliance
- Partnership for Southern Equity
- Annie E. Casey Foundation
- WonderRoot
- Georgia StandUp
- Race Forward
- Southface
- Center for Civic Innovation
- NPU system

Outcomes (from problem definition statement):

- New residents enter a community with awareness of and regard for the history of ongoing relationships in the neighborhood, and are enabled and encouraged to create connections that will strengthen the social fabric. This new tradition encourages legacy residents to embrace new equitable investments as they have learned that respectful and responsible change often means improvements to neighborhood infrastructure from which they benefit, allowing them to thrive in place.

Budget (all figures are estimates):

Project/Initiative	Cost
Arrive w/ Respect Campaign	\$500,000
Equity Evaluator Typology Development	\$50,000 (research) + \$\$\$ (implementation)
Arts & Culture, Green Infrastructure Campaign	\$25,000 (campaign) + \$2M annual investment
Neighborhood Leadership Training	TBD
Racial Equity Training/Toolkit for COA	TBD

S.M.A.R.T. – specific, measurable, attainable, relevant, and time bound



Timeline (who is doing what by when):

	2018	2019	2020	Ongoing
Who/ What	Design arrive w/ respect campaign (WR + TFA)	Pilot arrive w/ respect campaign (WR + AECF + TFA + ONE Atlanta)	Scale arrive w/ respect campaign (WR + TFA + ONE Atlanta)	Manage arrive w/ respect campaign (WR + ONE Atlanta)
Who/ What	Develop Equity Evaluator typology framework (Southface)	Pilot 3 neighborhoods for Equity Evaluator w/ new typologies (Southface)	Scale Equity Evaluator across city (Southface + TFA)	Manage/iterate Equity Evaluator (Southface + TFA)
Who/ What	Design/implement Arts & Culture, Green Infrastructure Campaign (ONE Atlanta + WR + OCA + Southface + TFA)	Increase COA arts budget by 2x w/ increase going toward funding cultural initiatives that highlight neighborhood culture	Mange new grant program (ONE Atlanta + OCA)	Mange grant program (ONE Atlanta + OCA)
Who/ What	Develop Neighborhood Leadership Training (GA Stand-up, PSE, TFA)	Pilot Neighborhood Leadership Training (GA Stand-up, PSE, TFA)	Scale Neighborhood Leadership Training (GA Stand-up, PSE, TFA)	Evaluate/maintain Neighborhood Leadership Training (GA Stand-up, PSE, TFA)
Who/ What	Research/develop racial equity toolkit (ONE Atlanta, TFA, PSE, Race Forward)	Pilot racial equity toolkit (ONE Atlanta, TFA, PSE, Race Forward)	Implement racial equity toolkit (ONE Atlanta, TFA, PSE, Race Forward)	Evaluate, maintain racial equity toolkit (ONE Atlanta, TFA, PSE, Race Forward)

S.M.A.R.T. – specific, measurable, attainable, relevant, and time bound



Recommendation: Strengthen civic infrastructure by evaluating the Neighborhood Planning Unit (NPU) system and identifying opportunities for deeper engagement while leveraging arts & culture, parks & greenspace, and other ways to meet Atlantans in their neighborhoods.

Description:

- Reimagine the current NPU system to create more authentic community and civic engagement and empower residents to shape the future of their community
- This addresses civic displacement and larger social barriers
- Consider opportunities to leverage arts/culture and parks/urban greenspaces to strengthen the city's conversation with its residents
- Encourage a more civically-minded neighborhood-level electorate – perhaps a training on the importance of being a civically-engaged citizen
- Consult with for-profit and non-profit developers, design professionals, attorneys, and other housing-related stakeholders across the city make recommendations on improvements in processes related to the NPU system
- Ensure active support by members of City Council to make any recommended amendments to the ordinances governing NPUs
- Provide technical assistance and consulting to NPUs to help build capacity from the inside, so that the NPUs function more effectively and efficiently, producing a more streamlined and predictable review process

Key Partners:

- Center for Civic Innovation (CCI)
- Department of City Planning
- Transformation Alliance (TFA)
- Partnership for Southern Equity (PSE)
- OneAtlanta
- WonderRoot
- Community Foundation for Greater Atlanta
- Neighborhood Planning Units (NPUs)
- Atlanta Planning Advisory Board (APAB)
- Park Pride

Outcomes (from problem definition statement):

- A report on the historic and context of the NPU system
- An audit and evaluation of the current NPU system
- NPU stakeholder input
- Community input through a community survey

S.M.A.R.T. – specific, measurable, attainable, relevant, and time bound



Recommendation: Create a communications strategy to educate residents on the importance and value of affordable housing AND...

Description:

- Align strategy with tactics set forth in Community Engagement Playbook, that are equity driven and city-adopted
- Multi-media campaign to create common messaging and include affordable housing glossary (build on Community Engagement Playbook). Build the case for why affordable housing is important.
- Community-driven, grassroots approach to leverage community partnerships, NPU system and neighborhood organizations

Key Partners:

- Public agencies (City of Atlanta, Invest Atlanta, Atlanta Housing, State of Georgia, MARTA, Atlanta BeltLine, Inc., APS, etc)
- Community organizations (NPU, housing advocacy groups, non-profit organizations directly engaging with residents, etc.)
- Philanthropic partners
- Religious community
- Colleges/universities
- Broader business community (i.e. Chamber of Commerce)

Outcomes (from problem definition statement):

Broad public support for affordable housing and a clear understanding of the resources available.

We are successful if (SMART metrics)

- Communications plan and tools are developed and implemented by 2019.

Budget (all figures are estimates):

Estimated not to exceed \$300,000

Timeline (who is doing what by when):

	2018	2019	2020	Ongoing
Who	Executive Committee	Chief Housing Officer	Chief Housing Officer	
What	Secure Funds Hire Consultant	Devise Strategy Implement Recommendations	Continue Implementation	

S.M.A.R.T. – specific, measurable, attainable, relevant, and time bound