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TRAIL NETWORKS AND HOUSING STABILITY PART 3: AFFORDABLE HOUSING PLANNING AND POLICY

JUNE 8, 2022 WEBINAR

CYNWYD HERITAGE TRAIL | THOM CARROLL

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Ryan Chao

Ryan Chao, RTC's president, oversees the organization's national leadership in trail development, policy advocacy and movement building. Ryan came to RTC after serving as vice president of civic sites and community change at the Annie E.Casey Foundation and as executive director of the San Francisco Bay Area-based Satellite Housing, where he led the development of affordable housing communities throughout Northern California.

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Natallie Keiser

Ms. Keiser is a dedicated non-profit executive with more than 25 years of experience creating opportunities for families with low incomes, strengthening communities and working for a more just and equitable society. She currently has responsibility for the Annie E. Casey Foundation's community development strategy in Atlanta, where she applies a racial equity lens to community leadership development, community safety, affordable housing and commercial development (current priority project is Pittsburgh Yards -www.pittsburghyards.com). Previously, she operated a community development consulting practice specializing in strategic planning, project management, fundraising, interim leadership and board governance. Key achievements included assisting 375 people achieve homeownership by coordinating Atlanta's NeighborhoodLIFT downpayment assistance program and successfully guiding the staff and Board of The Center for Working Families through an organizational transition.

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Marc Caswell

Marc serves as the Affordable Housing and Sustainable Communities (AHSC) Program Manager for the State of California's Strategic Growth Council (SGC) where he focuses on program planning, implementation, and evaluation. Prior to joining SGC, Marc was an Associate at Alta Planning + Design, managing dozens of transportation planning efforts, grant-writing, and community engagement campaigns across the United States. At Alta, Marc also led the development of transportation components of more than 20 AHSC applications for clients across Southern California. Earlier in his career, Marc worked for the City of Long Beach Public Works Department, as well as numerous advocacy organizations including Climate Resolve, San Francisco Bicycle Coalition, and Urban Habitat. Marc received a Master's in Urban and Regional Planning (MURP) from UCLA Luskin School of Public Affairs.

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Esther Shin

Esther Shin is President of Urban Strategies, Inc. USI). She leads a team of professionals with expertise in human capital and economic development to assist communities across the United States. Esther believes that all residents want safe, vibrant neighborhoods to work, live, and play. Esther's expertise spans the spectrum of community transformation activities that range from resource development to community engagement to program development and evaluation. Esther has led or supported securing fifteen Choice Neighborhood Implementation grants from the U.S. Department of Housing & Urban Development serving over 500,000 children and adults in 38 communities, amounting to more than $450 million in federal resources, which has leveraged more than $3 billion in additional investments. In 2016 Esther was selected by the Annie E. Casey Foundation for the tenth class of their Children and Family Fellowship. The Fellowship works to increase the pool of leaders with the vision and ability to frame and sustain major system reforms and community, capacity-building initiatives that benefit large numbers of children and families. She serves on the US Bank CDE Advisory Board, the MBS Urban Initiatives CDE Advisory Board, the HomeGrown StL Regional Steering Committee, and the Data Science for Social Impact Advisory Committee. Esther holds a Master's Degree from the George Warren Brown School of Social Work at Washington University in St. Louis and Bachelor's Degrees in both Political Science and English Literature from Washington University in St. Louis.

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THE ANNIE E. CASEY FOUNDATION

INCLUSIONARY HOUSING – BELTLINE NEIGHBORHOOD

Rails to Trails Conservancy

June 8, 2022

The Annie E. Casey Foundation develops solutions to build a brighter future for children, families and communities.

The Atlanta Civic Site

Building communities with a racial equity lens so that all children and families thrive:

- high-quality early **education** and public schools;

- access to **jobs** and other **economic opportunities**; and

- affordable, quality **housing** and strong resident networks.

Focus area – Neighborhood Planning Unit V (NPU-V)

The Atlanta Beltline

Effects of Trail Development on Housing Costs

Cumulative Change in Median Sale Price: 2011 to 2015
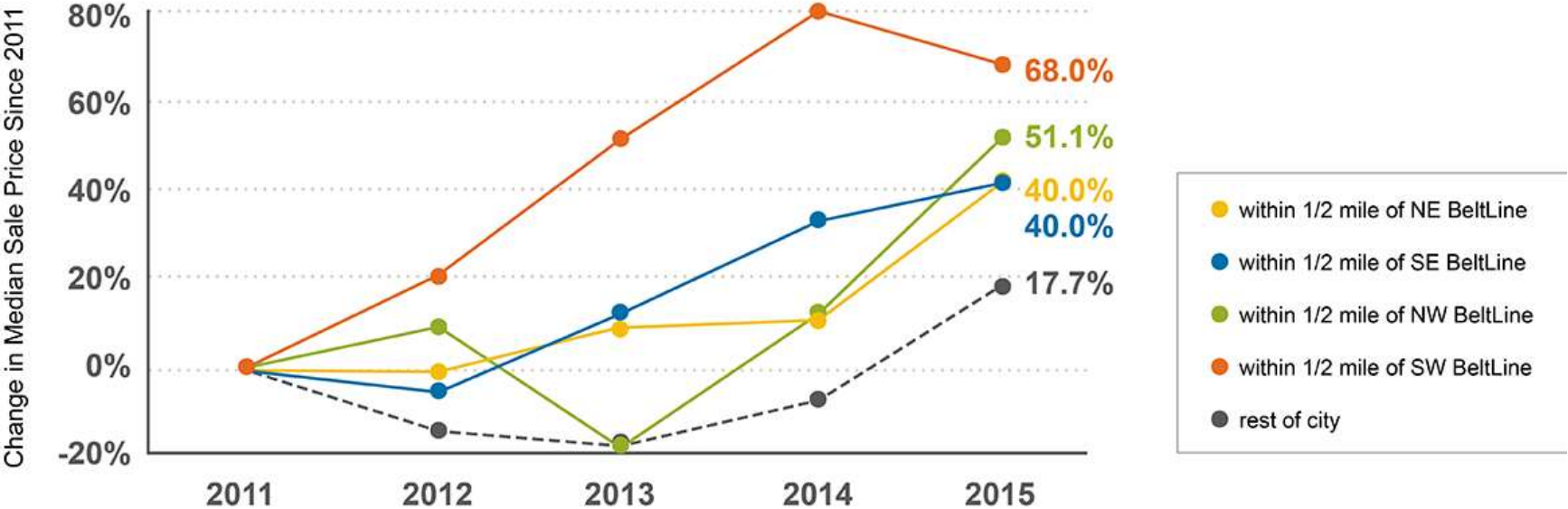
This chart demonstrates the profound effect the Atlanta BeltLine has had on the communities it passes through. Pittsburgh is located in the southwest segment, which has experienced the highest price increases.

Source: Analysis completed by Dan Immergluck and Tharunya Balan.

The Housing Landscape in Focus Neighborhoods

The goal is to *preserve and increase* quality housing options that have long term affordability, especially for renters:

- **77% of households rent**

- **54% of renters cost burdened* as of 2020**

- **24% of homeowners cost burdened as of 2020**

- **93% of housing stock built prior to 2000**

ATLANTA**
Home Sales
Costs UP 53%

Rents
UP 43%

* Cost burdened defined as 30%+ of income spent on housing

** Based on Zillow indexes since 2017

Key Strategies in Focus Neighborhoods

Support affordable ownership

- Redevelopment of 53 foreclosed properties
- Community land trust for permanent affordability

Retain existing homeowners

- Home repairs
- Asset-protection education

Protect tenants' rights and prevent evictions

- School-based legal assistance
- Tenants' associations

Preserve and develop affordable multifamily rentals

- Development subsidies
- Technical assistance

Key Strategies at Local and State Level

Partner with advocates

- State – Georgia Supportive Housing Association, Georgia ACT (Advancing Communities Together), Enterprise Community Partners

- Local – Housing Justice League, Neighbors for More Neighbors (Yes in My Backyard), Gideons Housing Task Force

Improve state and local policies

- State housing trust fund

- Land trust tax status

- Healthy housing/tenants' rights
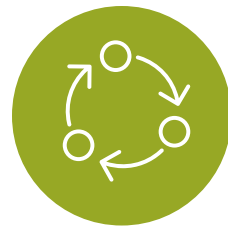
Local systems development

- HouseATL

HouseATL – Local Systems Development

- Focused on raising private funds, tracking and coordinating progress and advocating for policy and public resources to address the shortage of affordable homes.

- Composed of nonprofit, philanthropic, public and business entities.

- Committed to racial and socioeconomic equity.

HouseATL - Coordination Is Key

Old Way

- Inefficient
- Piecemeal approach

Engage developers

Meet with public partners

Meet with CDFIs

Leverage public resources

Have lengthy approval process

Meet with multiple banks

Assemble capital stack

Run capital campaign to raise remaining project funds
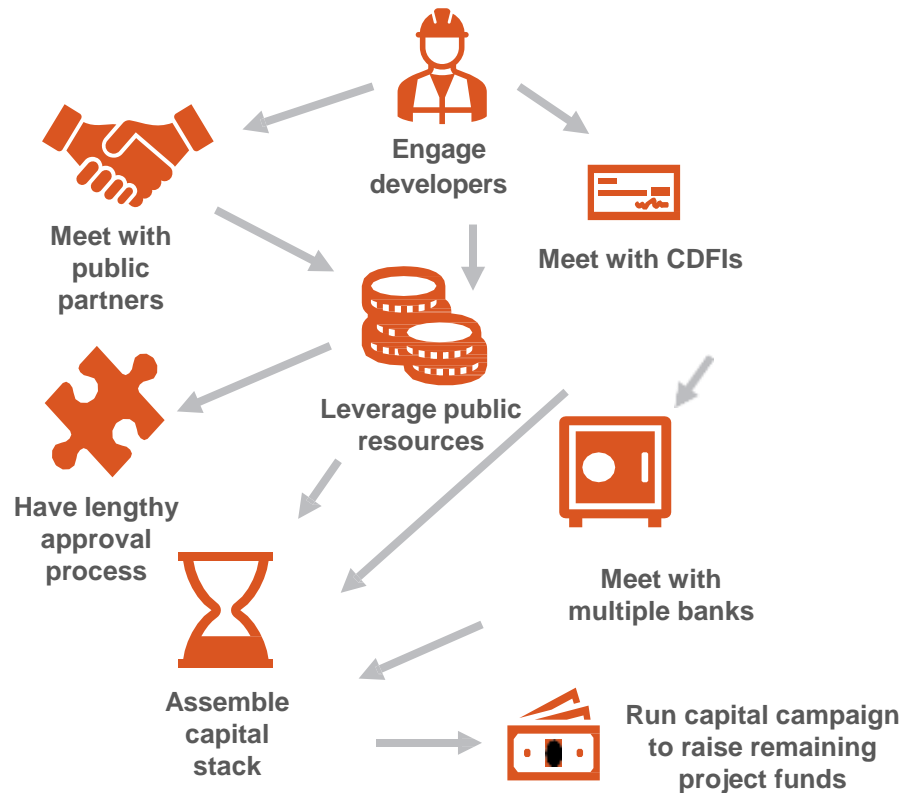
HouseATL Way

- Coordinated
- Maximizes resources
- Systemic change

Shared priorities for systemic change; public and private sector alignment

Coordinated funding; players at the same table

HOUSE ATL

Consistent criteria for investment; thorough vetting of projects

Pipeline tracking

Atlanta Beltline Strategies

Goal: Create or preserve 5,600 units of affordable and workforce housing by 2030.

- Beltline Affordable Housing Trust Fund (15% of Tax Allocation District bonds)

- Inclusionary zoning ordinance (new 10+ unit developments)

- Special Services Tax District

- Property tax grant for legacy homeowners (funded by philanthropy)

THE ANNIE E. CASEY FOUNDATION

Developing solutions to build a brighter future
for children, families and communities

www.aecf.org

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Emissions by Economic Sector
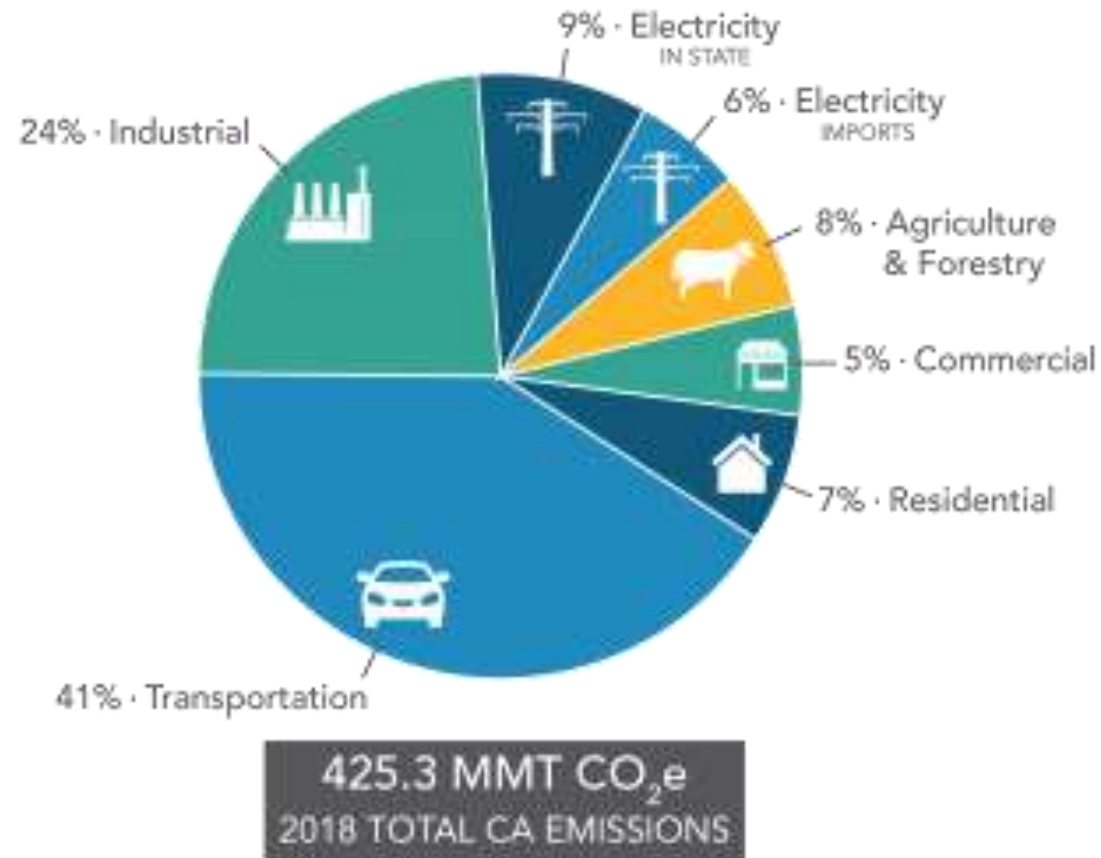
EMISSIONS BY ECONOMIC SECTOR. Data Source: California Air Resources Board (CARB), 2000-2018 GHG Inventory (2020 Edition).

Culprit: Vehicle Miles Traveled

Why do we drive so much?

Lack of location-efficient housing

Lack of quality low-carbon transportation options

AHSC Program Vision

- Funds **infill** projects that reduce **Greenhouse Gas (GHG)** emissions and **Vehicle Miles Traveled (VMT)** through sustainable land use, housing, and transportation practices

- Bringing together **affordable housing** and **transportation** worlds

California's Greenhouse Gas Reduction Fund

Graphic 1: Greenhouse Gas Reduction Fund Spending[15]

- All Other Programs 40%
- High Speed Rail 25%
- Affordable Housing and Sustainable Communities 20%
- Transit & Intercity Rail 10%
- Low Carbon Transit Operations 5%
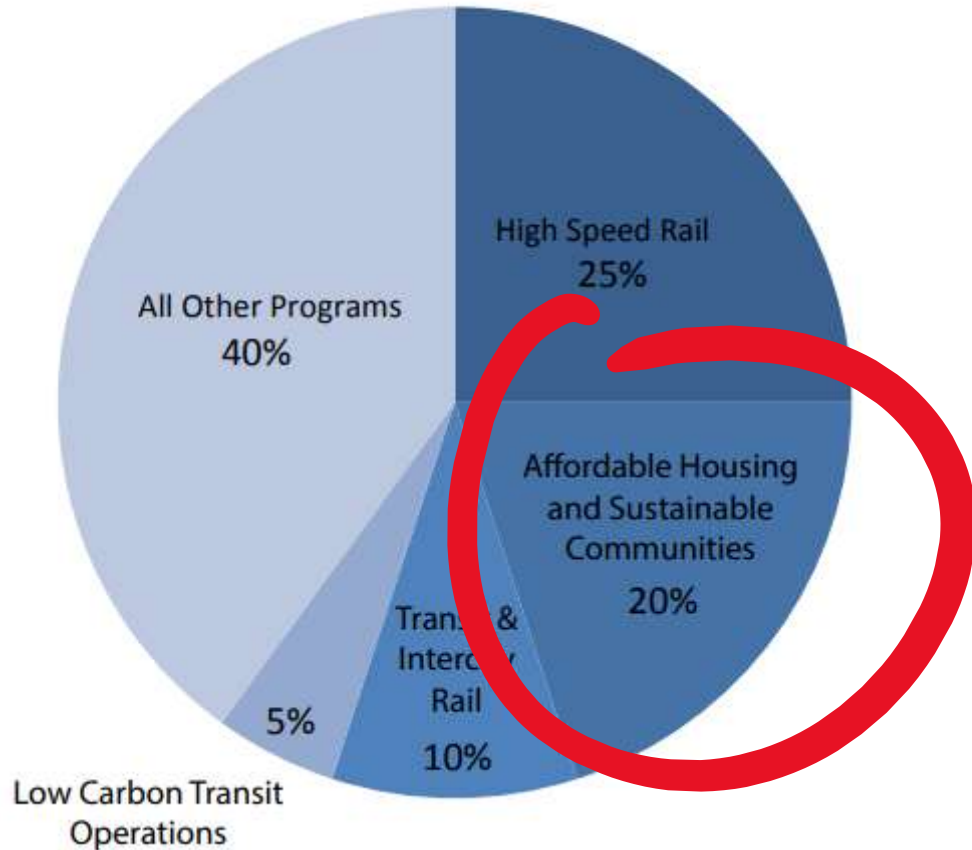
- California's portion of the Cap-and-Trade auction proceeds are deposited in the Greenhouse Gas Reduction Fund (GGRF) to be used for *California Climate Investments*.
- 73 programs are administered by 22 state agencies
- In 2021, California Climate Investments implemented $2.1 billion, bringing the cumulative total to almost $10.5 billion.

CUMULATIVE OUTCOMES

- $18.3 B APPROPRIATED
- $10.5 B IMPLEMENTED
- GHG 76.0 $MMTCO_2e$ REDUCED

AHSC Funds Continue to Grow

Affordable Housing

Urban Greening

Transit Vehicles & Service Expansion

Bus Shelters

Bikeways (all types)

Sidewalks and Pathways

Resident & Business Anti-Displacement

Grocery Store

Grocery Store

School Bus

Program Impact

- 6 Rounds Awarded so far
  (Note: data in graphic is through Round 5)

- 164 projects across the state ($2.4 billion)

- Largest continuous state funding for Affordable Housing in California

- Second-largest state funding source for Active Transportation

- Continuously funded through 2030

Data Source: California's Affordable Housing and Sustainable Communities Program 5 Years of Investments, January 2021

Who is Eligible to Apply?

Eligible Applicants		
Developer: Public, Private, or Nonprofit	Regional Transportation Planning Agency	Public Housing Authority
Local Transportation Department or Public Works Department (City or County)	University or Community College District	Congestion Management Agency
Transit Agency or Operator	School District	Facilities District
Qualified Tribal Entity	Joint Powers Authority	Program Operator: Public, Private, or Nonprofit

In nearly ever application, Housing Developer is the Lead Applicant. Others sign Joint Liability Agreements or MOUs

Program Award Process

- Projects are awarded based on highest score. Funds are split into one of three Project Area Types
  - 35% to Transit Oriented Development (TOD)
  - 35% to Integrated Connectivity Projects (ICP)
  - 10% to Rural Innovation Project Areas (RIPA)
- Remaining ~20% to Statutory & Council Targets
  - +50% to Disadvantaged Communities (DAC)*
  - +50% to housing*
  - *Not mutually exclusive
- At least one tribal project
- At least one in each 8 geographic areas
- Once all goals are achieved, highest scoring projects are awarded across all categories

20% · 35% · 10% · 35%

■ TOD ■ ICP ■ RIPA ■ Discretionary
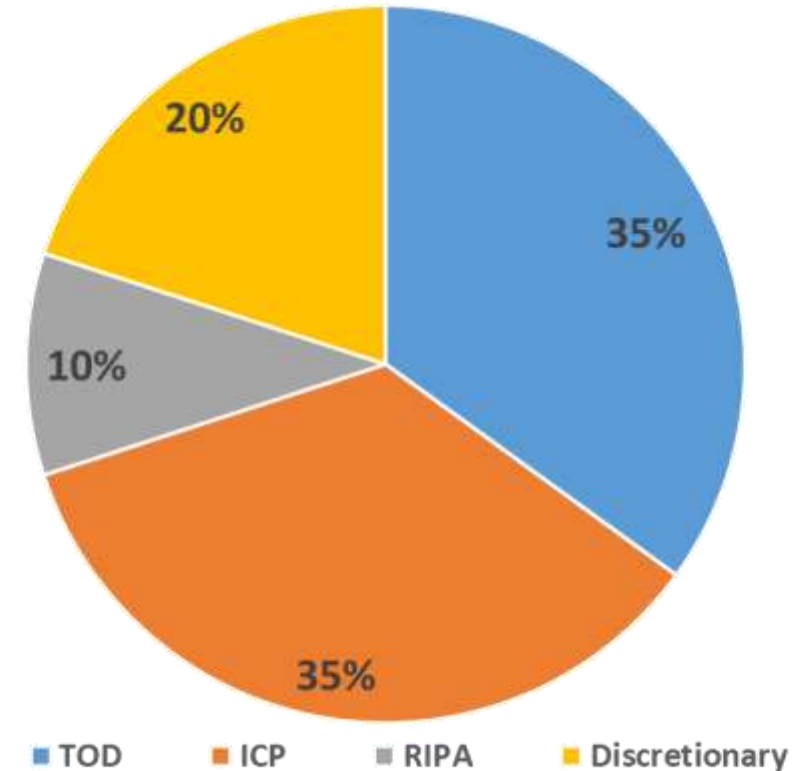
Program Requirements

- Housing must be average affordability of 50% AMI
  - Must be infill: 3 of 4 sides must be developed already
- Housing must be within half-mile of a transit line
  - Quality of transit determines density requirement
  - Must include 1 secure bike parking spot for every 2 units
- Development should be "Shovel Ready"
  - Site Control, environmental clearance & entitlements
  - 90% of enforceable funding commitments
  - Experience with similar projects
- Required to complete all project scope within 5 years!
  - Yes, that includes bikeways! ;)

CALIFORNIA STRATEGIC GROWTH COUNCIL

CALIFORNIA CLIMATE INVESTMENTS

Cap and Trade Dollars at Work

Program Details

- Projects have a maximum ask of $30M
  - $20M for Affordable Housing (must also be 50% of total request)
  - $10M for bike/walk/transit/urban greening/programs

- Projects are scored on a 100-point scale
  - 30 points for GHG Reductions
  - 15 points for Narrative
  - 55 points for "Quantitative Policy Scoring" (QPS)

- QPS is intended to 'nudge' applicants to invest in (expensive) components that may not be quantified in GHG score

- AHSC is a chance to push boundaries and innovate

Quantitative Policy Scoring – 55 Points

Quantitative Policy Scoring	
Active Transportation Improvements	10
Green Buildings and Renewable Energy	10
Housing and Transportation Collaboration	9
Location Efficiency and Access to Destinations	6
Funds Leveraged	4
Anti-Displacement Strategies	6
Local Workforce Development and Hiring Practices	3
Housing Affordability	5
Programs	2

- **"Checklist" approach**
- **Self-scored by applicant, reviewed by AHSC Staff, with chance for appeal**
- **Intent is <u>not</u> for projects to receive 100%**

Active Transportation Improvements - 10 Points

Points	Improvement
2	Context Sensitive Bikeways • Over 1/2 mile for maximum points
1	Bicycle Network Connectivity • Link bicycle network to AHD or Qualifying Transit Stop
2	Bicycle Network Gap Closure • Traffic calming / visibility / improve safety
2	Safe and Accessible Walkways • Over 2,000 feet for maximum points
1	Pedestrian Network Connectivity • Link two disconnected pedestrian networks
2	Pedestrian Network Gap Closure • Increase pedestrian safety

Location Efficiency and Access to Destinations - 6 Points

US EPA Walkability Index	
Most Walkable	3 points
Above Average Walkable	2 points
Below Average Walkable	1 point
Least Walkable	0 point

Key Destinations within ½ Mile of AHD	
Grocery store	.33 points
Medical clinic	.33 points
Public elementary, middle or high school	.33 points
Licensed child care	.33 points
Pharmacy	.33 points
Public park	.33 points
Public library	.33 points
Office Park	.33 points
University or Junior College	.33 points
Bank or Post Office	.33 points
Place of worship	.33 points

Anti-Displacement Strategies - 6 points

Implementing Anti-Displacement Strategies or Locating Projects in Areas with Existing Anti-Displacement Strategies	
Prevent Displacement of Local Community Residents	up to 4 points
Prevent Displacement of Locally Owned Businesses	up to 2 points

Examples include:

- First right of return ordinance, including moving expenses

- Multi-lingual tenant legal counseling program

- Small business advocacy office

- Prioritization of M/WBE for contracting
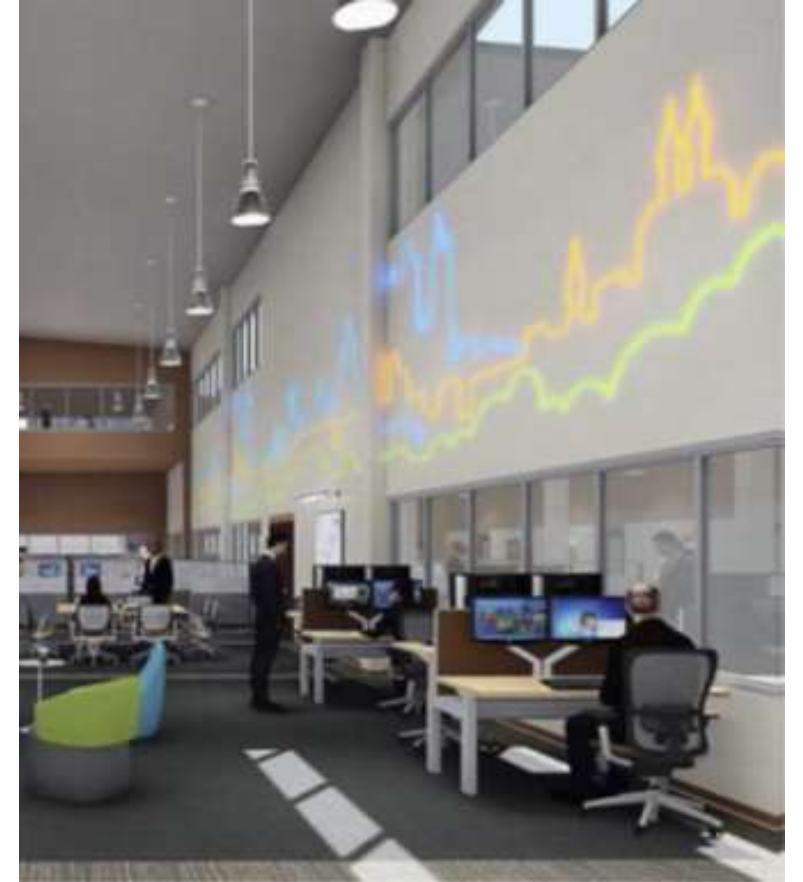
Local Workforce Development & Hiring Practices – 3 points

Projects are awarded 1.5 points per strategy

Five options available:
- Funding a workforce development organization
- Funding a partnership with a workforce development board
- Skilled and Trained workforce commitment
- Project labor or community workforce agreement
- Local hire

Programs - 2 points

1. Active Transportation Programs
2. Transit Ridership Programs
3. Criteria Air Pollutant Programs
4. Workforce Development Programs
5. Low-income Car Sharing Programs

Percentage of Total Units Restricted to ELI Units	
Eligible Program	1 point
Extend Program Beyond Funded term	1 point

- Does not include required Transit Pass Programs

Thank you!

More info: sgc.ca.gov/programs/ahsc

Marc.Caswell@sgc.ca.gov or AHSC@sgc.ca.gov

Presented by Marc Caswell, June 2022

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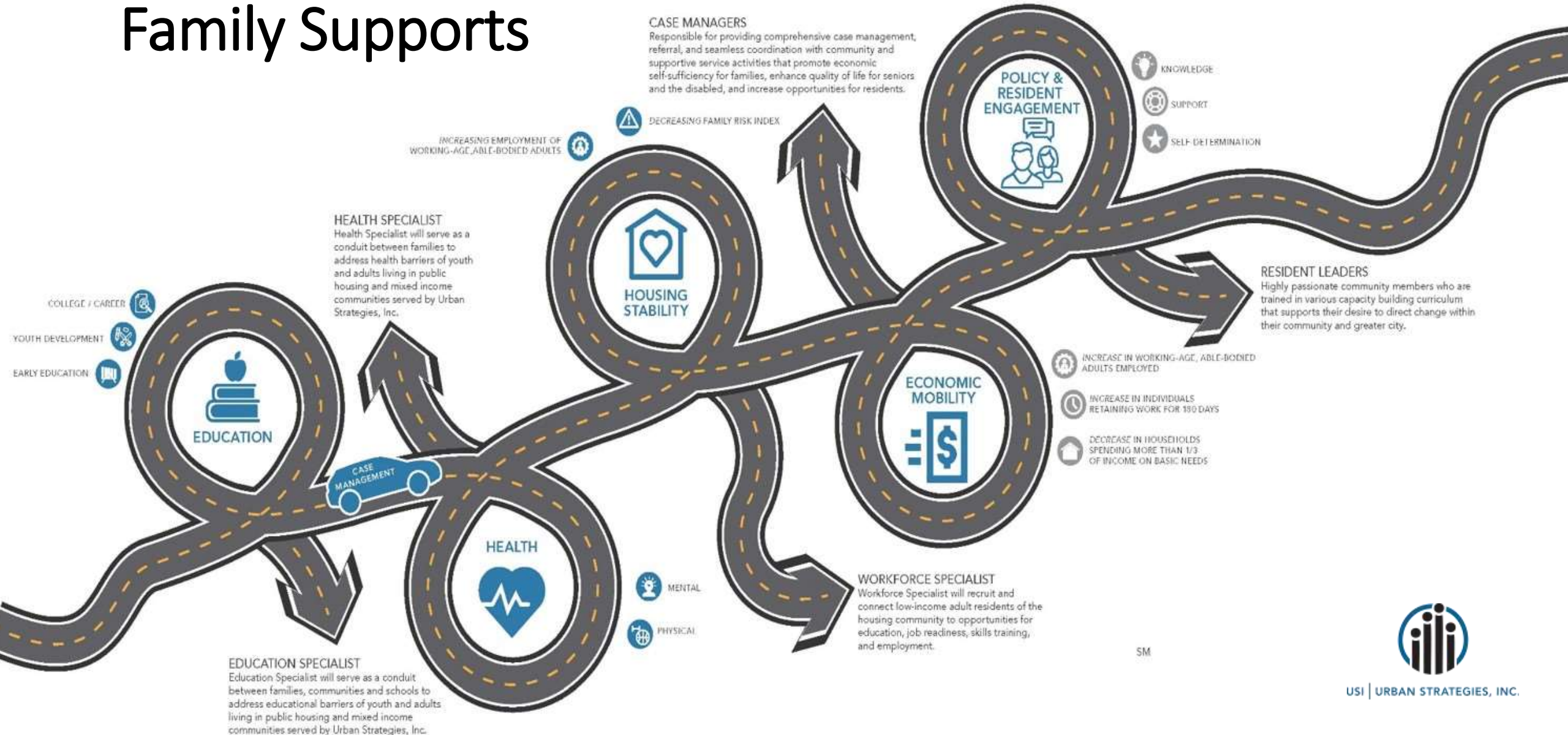
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WHO IS USI?

Urban Strategies, Inc. (USI) is a national not-for-profit organization that specializes in results informed human services development, planning, and strategy implementation as part of comprehensive neighborhood revitalization.

OUR MISSION…
All children and families will be STABLE and THRIVING.

HOW WE WORK-
Family Supports

CASE MANAGERS
Responsible for providing comprehensive case management, referral, and seamless coordination with community and supportive service activities that promote economic self-sufficiency for families, enhance quality of life for seniors and the disabled, and increase opportunities for residents.

DECREASING FAMILY RISK INDEX

INCREASING EMPLOYMENT OF WORKING-AGE, ABLE-BODIED ADULTS

HEALTH SPECIALIST
Health Specialist will serve as a conduit between families to address health barriers of youth and adults living in public housing and mixed income communities served by Urban Strategies, Inc.

COLLEGE / CAREER

YOUTH DEVELOPMENT

EARLY EDUCATION

EDUCATION

CASE MANAGEMENT

HOUSING STABILITY

POLICY & RESIDENT ENGAGEMENT

KNOWLEDGE

SUPPORT

SELF-DETERMINATION

RESIDENT LEADERS
Highly passionate community members who are trained in various capacity building curriculum that supports their desire to direct change within their community and greater city.

ECONOMIC MOBILITY

INCREASE IN WORKING-AGE, ABLE-BODIED ADULTS EMPLOYED

INCREASE IN INDIVIDUALS RETAINING WORK FOR 180 DAYS

DECREASE IN HOUSEHOLDS SPENDING MORE THAN 1/3 OF INCOME ON BASIC NEEDS

HEALTH

MENTAL

PHYSICAL

WORKFORCE SPECIALIST
Workforce Specialist will recruit and connect low-income adult residents of the housing community to opportunities for education, job readiness, skills training, and employment.

SM

EDUCATION SPECIALIST
Education Specialist will serve as a conduit between families, communities and schools to address educational barriers of youth and adults living in public housing and mixed income communities served by Urban Strategies, Inc.

USI | URBAN STRATEGIES, INC.

HOW WE WORK-
Policy & Influence (Systems Change)

Thought Leadership

Advocacy

Community of Practice

Technical Assistance
(RBA and DEI)

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Families at the Center of Results

HOW WE WORK-
Community Development Financial Institution (CDFI) (Decreasing the Wealth Gap)

Our goal is to propel entrepreneurs to prosperity and economic liberation through the creation of middle income/wealth generating jobs and businesses.

The USI CDFI Fund will provide equitable and accessible capital, along with financial services to Black and Brown individuals., Women and Minority Owned Business Enterprises (W/MBEs) and local firms for contracting and development opportunities

The Fund will create a pipeline to affordable credit and capital, enabling our clients to participate in the revitalization of their communities as business owners, entrepreneurs, and agents of change, in addition to being residents.

We stive to reduce the racialized wealth gap within our communities by **20%** over the next **10** years.

USI | URBAN STRATEGIES, INC.
Families at the Center of Results

RACIAL EQUITY LENS

RESULTS COUNT FRAMEWORK©

The Results Counts approach is based on five core competencies of results-based leadership development.

BE RESULTS-BASED AND DATA-DRIVEN

BRING ATTENTION TO AND ACT ON DISPARITIES

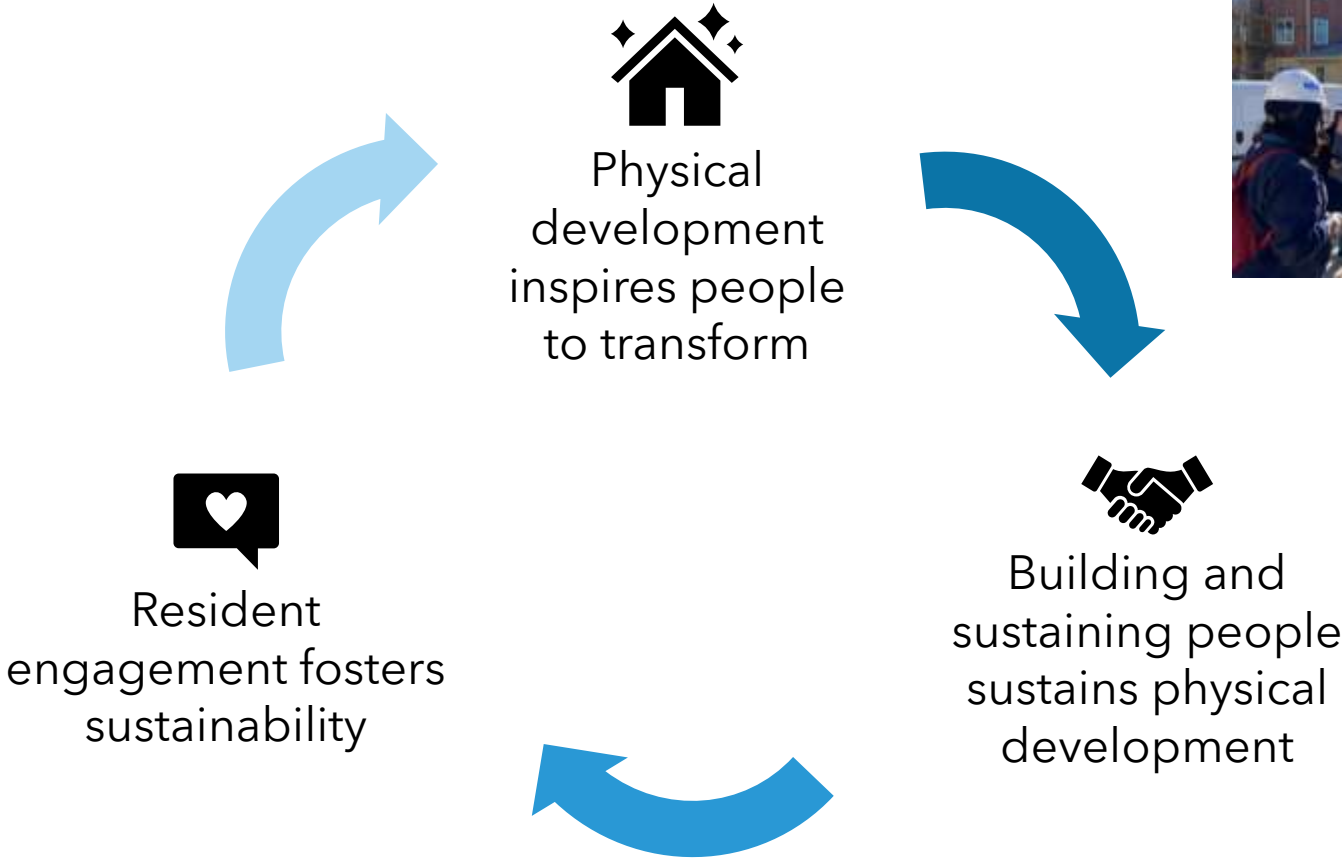**USE ONESELF AS AN INSTRUMENT OF CHANGE TO MOVE A RESULT**

COLLABORATIVE LEADERSHIP

ADAPTIVE LEADERSHIP

Theory of Change

USI Resident Engagement Continuum

✓ Community Engagement Statement:
  ✓ USI supports intentional opportunities that connect residents to their community and neighbors. Engagement opportunities should create real linkages to people or activities that are of concern to the resident or community.

Eliminating barriers to obtaining information or events where information is shared. Examples might include transportation or child care.

Support

Connecting residents to information that assist them in making informed decisions about their community or family.

Knowledge

Self-Determination

Residents are encouraged to participate on their own terms, at their pace, and based on their needs.

Communities and Green Spaces

St. Louis, MO

Near North Side Choice Neighborhoods

- Four Community Priorities: Highlight – "Our Ability to Endure" or Sustainability

Great Rivers Greenway (GRG)

- GRG is the public agency connecting the St. Louis region with greenways. In 2000, a vote of the people created a sales tax to leave a legacy for future generations by connecting three counties together with greenways. When complete, the concept calls for a 600 mile network of greenways. Brickline Greenway is underway!

Addressing the Dirty "G" Word

Addressing Gentrification

- Is it Really Such a Dirty Word?

- Responsible Development
  - Boost LIHTC Basis Points

- Real Economic Opportunity
  - The boost that is Mardi Gras!

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Have examples of relevant trail networks you want to share with us? Email at torsha@railstotrails.org

To learn more about RTC's work on Trail Networks and Housing Stability, and view past webinars in this series, visit https://www.railstotrails.org/housing

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Discussion and Questions

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Thank You!

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