



## SERVICE APPROACH

### PROJECT UNDERSTANDING

The Village seeks to create and preserve affordable/workforce housing. Due to complexities with required documentation for income certification and administration of the Village's First Time Home Buyers Down Payment Assistance Program and the sensitive nature of information required to confirm compliance with affordable housing criteria and restrictions, the Village seeks to engage a consultant firm to augment and support the Planning and Development Services Department in performance of the departmental duties and in providing an acceptable level of service to developers, contractors, home owners and residents.

### PROPOSED SCOPE OF SERVICES

The Corradino Group submits the following proposed scope to address all aspects of monitoring and providing support services to administer affordable housing programs within the Village.

#### **1. Annual monitoring services for verification of compliance with affordable housing restrictions and ongoing income certification for prospective occupants/owners of deed restricted affordable housing**

Establish an "Affordable Housing Qualifications Packet" which will include all necessary applications and instructions in accordance with the directive in Section 30-639(a)(5) to create affordable guidelines. The packet will be available to the public at the Village Hall and online. The consultant will also provide assistance and answer questions related to the application process and general qualifications, as needed.

Review and approve applications on an ongoing basis as they are received in the Department. This will include review of applications for the Village's First Time Homebuyers Down Payment Assistance Program; potential buyers of existing deed-restricted affordable units; and potential renters of deed-restricted affordable units. This may or may not include income certification for renters at the Wet Net Villas.

At least once a year the owners and renters that have qualified to occupy deed-restricted affordable units will be contacted for verification of compliance requirements, including verification of their annual income.

On an annual basis the consultant will prepare an update of the Affordable Housing Fact Sheet (last published April 2017). The annual update will be based on the annual median household income for Monroe County (\$68,700 in 2017). The updated fact sheet will be included in the "Affordable Housing Qualifications Packet".

#### **2. Comprehensive reports following the annual audit of all deed-restricted affordable housing units in the Village**

The monitoring services will include maintenance and updates of the inventory list of deed-restricted affordable housing units in the Village. The list will be updated annually, and a comprehensive report will be submitted to the Village Manager.





***Affordable housing shall be defined as provided in Chapter 30-32***

For all residential dwelling units having deed restrictions recorded before January 1, 2007, where monthly rent not including utilities, or monthly mortgage payment (including taxes and insurance, but not including utilities), does not exceed 30 percent of that amount which represents 120 percent of the monthly median household income for Monroe County, to be enforced by recording of a deed restriction which shall run with and bind the dwelling unit and all subsequent owners of the dwelling unit for a term of 20 years from the date of recording.

For all residential dwelling units having deed restrictions recorded on or after January 1, 2007, the deed restriction shall run with and bind the dwelling unit and all subsequent owners of the dwelling unit for a term of 30 years from the date of recording, after which time the restriction shall be extended automatically for successive periods of ten years each. All deed restrictions shall be submitted in a form approved by the village attorney. The sales price shall not exceed three and three-quarters times the annual median household income for Monroe County for a one bedroom or efficiency unit, four and one-quarter times the annual median household income for Monroe County for a two bedroom unit and four and three-quarters times the annual median household income for Monroe County for a three or more bedroom unit. Additionally, all rental units shall have monthly rent, not including utilities, not exceeding 30 percent of that amount which represents 100 percent of the monthly median household income for Monroe County.

The dwelling unit must also meet all applicable requirements of the United States Department of Housing and Urban Development minimum property standards as to room sizes, fixtures, landscaping and building materials, when not in conflict with applicable laws of the village.

For the purposes of this section, "annual adjusted gross income" means all wages, assets, regular cash or non-cash contributions or gifts from persons outside the household, and such other resources and benefits as may be determined by the United States Department of Housing and Urban Development, adjusted for family size, less deductions allowable under section 62 of the Internal Revenue Code.

**3. Administration of the First Time Homebuyers Down Payment Assistance Program (FTHDP Assistance)**

Pursuant to Chapter 22, Article III, the monitoring consulting services will include administration of the FTHDP Assistance Program. The services will include an application review, resulting in approval, denial or suggest amendments. All application reviews will be provided to the applicant in writing. Applicants may receive up to a \$10,000 down payment to purchase qualified homes in the program. The application upon receipt will first be reviewed for completeness, including a review to ensure all necessary documentation is submitted. Completeness reviews will be by appointment only. If the application is determined to be complete, it will be reviewed for qualification for the program. The current Fiscal Year 17/18 Affordable Housing Trust Fund budget allocates \$30,000 for this assistance program.

On or before November 1st of each year, the Director or their designee, shall submit to the Village Council a report on transactions involving the program for the preceding fiscal year, including, but not limited to, the following:

1. Number of defaults; and
2. Number of noncompliance incidents; and
3. Number of participants refinancing first mortgage loans; and
4. The sales price of housing units for the preceding fiscal year; and
5. The income and income category (very low, low, and moderate) of each new participant; and
6. Any repayments of loans made pursuant to the program; and
7. Other reports as requested by the Village Council.





#### 4. Verification of recordation of deed restrictions in the Public Records of Monroe County

As needed, when units (either existing or new development) are designated as a deed-restricted affordable housing unit, the deed-restriction is required to be recorded in the public record. The recordation will be verified prior to the unit being added to the Village inventory of deed-restricted affordable units.

#### 5. Respond to public inquiries related to affordable housing deed restricted properties and other affordable housing programs within the Village

A Planner will be available to answer questions and provide information to those interested in understanding about the qualification requirements and the various programs available to those employed or currently residing in the Village. The Planner will answer and respond to inquiries which may include requests for copies of deed restrictions, corresponding codes/ordinances, explanation of the impact of the restriction on the value of the property and marketability. The Planner will have predetermined hours on a regular schedule to provide information to the public.

#### 6. Other affordable housing services as requested

Pursuant to Chapter 30 – Division 16 Affordable Housing Standards, Section 30-631 – 30-641, other affordable housing services may include administering the Planning review of developer initiated Affordable Housing Mitigation Plans; Affordable Housing Agreements and Independent Calculation for Alternative Mitigation. Based on the Affordable Housing Standards, all development that increases the need for affordable housing units must submit a mitigation plan or an alternative mitigation plan for review and approval by the Planning Department. Following approval of the plan, the applicant must submit an Affordable Housing Agreement for review and approval. A yearly update of the average property values in the Village will be prepared as part of administration of this process.

Additional services that may be provided could include Planning for Village initiated affordable housing developments. The Village collects in-lieu fees when it is determined to be in compliance with the Affordable Housing Standards, based on an approved mitigation plan and an approved agreement. The fees are managed through the Affordable Housing Trust fund which restricts the use of the funds to be for Planning, Subsidizing or Development of affordable housing in the Village. As the funds become available, the Village may wish to pursue construction of deed restricted homes that could be added to the program. As the consultant to the Village, planning services for this type of activity could be provided under this contract.







## PROJECT STAFFING AND MANAGEMENT

The Corradino Planning team consists of a multi-disciplinary group of seasoned professionals, most with decades worth of experience in all aspects of municipal planning. The following key individuals have been thoughtfully chosen based on the Village's needs for consulting services.

Joe M. Corradino, as the President of The Corradino Group, will lead the effort and fill the role of Principal-in-Charge. All work efforts will flow through Mr. Corradino who will review each assignment with the Project Manager, Edward Ng. Mr. Ng will manage the individual planner assigned to the effort. Two Assistant Project Managers, Scarlet Hammons and Michelle Lopez, will assist as needed; both Planners are very suited in a support role to the PM. The Assistant Planner for this contract will be Eric Ketterling. The Assistant Planner will perform the more routine consulting services, including providing information to the public and conducting research as needed.

## QUALITY CONTROL PROCESS

Corradino maintains an excellent track record of satisfied clients, staff utilization goals, and projects completed on-time and within budget. At the start of every month the project manager is provided with an "effort detail sheet" which shows the percentage of work, budget, and time completed. The project manager reviews this with the firm's accounting department as a second level of quality control.

Additionally, as work orders are assigned, the project is managed through a team approach. The majority of the work effort is completed by the primary planner while a second planner is assigned to conduct a quality review before the deliverable is submitted to the Village.

## APPROACH TO THE PROJECT

Corradino will be ready to initiate each assigned work order immediately upon the notice to proceed. To do so, Project Manager Mr. Ng, and the Assistant Project Managers, will meet with the Village staff to confirm the scope and kickoff the project. Technical work will be produced on a task-by-task basis and reported in a manner acceptable to the Village. Progress will be tracked on a percent-completed basis. This frequent communication between Corradino and the Village will ensure that the Village is satisfied with the administrative and technical progress of work product.

- 1. **Project Objectives and Scoping** - We will assemble the right member of our team to develop project objectives and the scope of work with you in a meeting or workshop setting.
- 2. **Project Scheduling** - We will develop and maintain Project Schedules that meet the objectives of the Village and reflect activities and critical interim milestones. The schedule will be updated and submitted to the Village as project conditions require.
- 3. **Project Reporting** - In a format acceptable to you, we will record the progress of the Projects and submit written reports to the Village on a regular basis, addressing project schedule and budget status.





