

1 Affordable Housing Development Overview

- AH Summary Overview
 - Definitions / Steps in the Process
 - Planning your schedule
- AH Continuum concept and intro to terms (graph & takeaways)
- Predevelopment Phase vs Develop Phase
- Housing Needs Assessment introduction
- Funding Sources, Restrictions & Uses intro

- Snapshot chapter
- Headings/Intro of Summary page (p. 11 in Utah Guide) possible infographic format
- Introduce Housing Needs Assessment in Chapter 1: focus is on small-scale development (up 30 units)

2 Organizational Considerations

- Impacts on your organization and operations
- Assessing your capacity
- Housing goals and objectives: action plan

- New Construction vs AcqRehab vs Preservation with highlights in each chapter for considerations for each.
- Streamline to align with all developer types vs just nonprofits (separate on-profit section?)

3 Housing Development Models, Team and Roles

- Elements of Housing Dev Model
- Accessing your capacity
- Housing goals ad objectives: action plan
- Development Team and Roles
- Building the Right Team

- Take highlights of “Dev Models” and streamline to general development
- Summary page (p. 11 in Utah Guide)- possible infographic format

4 Engaging the Community

- Community Members
- Local Officials
- Housing Organizations
- Ways to engage your community

- Highlight community engagement beginning early in process: pre/during predevelopment phase

5 Predevelopment

- Site Selection & Acquisition
- Architect
- General Contractor
- Lenders
- Environmental Consultants
- Project Consultants
- Government

- Include historic preservation and cultural resource protection as a section next to environmental review

6 Market Feasibility

- Difference between housing needs assessment & market analysis
- Steps 1 – 5 (Utah Guide example)
- Completing a professional market analysis

7 Financial Feasibility

- What is a Financial feasibility analysis?
- Total Development Cost
- Sources and uses of funds statement
- Proforma schedule of income & expenses
- Handling project weaknesses
- Example of Funding Sources, Restrictions & Uses –Matrix “call-out”
- Regulatory requirements
- AH Partners Resources: Community Land Trust, CDFIs, etc.
- Loan Applications
- Grant Applications
- Gap Funding Applications

- Introduce working/relationship with Lender earlier in process
- Add subsection for all main funding types that people should be looking into. This talks about the process for applying for funding but does not go into the funding types as much
- Regulatory requirements: ex. Davis Bacon, land use agreements, regulatory agreements, etc.
- Resource Partners: create list of options

8 Project Construction

- What to expect during the construction process
- Construction Management tasks
- Selecting the contractor
- Marketing
- Waiting Lists
- Construction Types
 - Modular
 - Stick built
- Rehabilitation vs New Build

9 Project Operations & Compliance

- General management tasks
 - Maintenance
- Financial management
- Hiring a management company
- Compliance considerations

- Could compliance be a section of operations? Introduce in Operations, more information in its own chapter?

10 Case Studies & Worksheets

- One case study of each type (NC/Acq Rehab/Pres/adaptive reuse -repurposing)
- References to case studies in each chapter?
- Include worksheets (i.e. Utah Guide) in the guide (PDF) as well as in Excel.
- Case studies: include as many actual documents discussed as possible including example needs assessment, market study financial feasibility, and environmental review documents.
- Documents should be from the same project so that readers can see the whole process for that project
- *CHFA committee will pick the cases studies to be included

11 Glossary & Acronyms

- List of common acronyms

12 Resources

- Housing Needs Assessment resources