

Memorandum

To: Housing and Homelessness Commissioners

From: Savannah Clement, Housing Policy and Planning Analyst

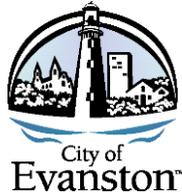
Subject: December 6, 2018 HHC Meeting Cover Memo

Date: December 3, 2018

Attached please find:

- The meeting agenda
- Item 1: Draft minutes of the November 1, 2018 meeting for approval
- Item 2: Staff memo on the Age Friendly Evanston Task Force's request for a senior housing feasibility study funding, with application and letters of support attached
- Item 3: Staff memo on the Community Partners for Affordable Housing application for renewal funding for IHO waitlist management, with application and budget attached
- Item 4: Demolition fee and Affordable Housing Fund documents

We look forward to seeing you on December 6th.



HOUSING AND HOMELESSNESS COMMISSION

Thursday, December 6, 2018

7:00 PM

Lorraine H. Morton Civic Center, 2100 Ridge, Room 2402

- 1. CALL TO ORDER / DECLARATION OF QUORUM**
- 2. APPROVAL OF MEETING MINUTES** November 1, 2018
- 3. PUBLIC COMMENT**
- 4. AGE-FRIENDLY EVANSTON HOUSING COMMITTEE APPLICATION FOR AFFORDABLE SENIOR HOUSING FEASIBILITY STUDY FUNDING**
- 5. COMMUNITY PARTNERS FOR AFFORDABLE HOUSING (CPAH) APPLICATION FOR IHO WAIT LIST MANAGEMENT FUNDING**
- 6. DEMOLITION TAX DISCUSSION CONTINUED**
- 7. STAFF REPORTS**
- 8. CHAIR'S REPORT**
- 9. NEW/OTHER BUSINESS**
- 10. ADJOURNMENT**

Next Meeting: January 10, 2019 at 7:00 p.m. in room 2403

Order & Agenda Items are subject to change. Information about the Housing and Homelessness Commission is available at: www.cityofevanston.org/government/agendas-minutes. Questions may be directed to Savannah Clement at 847.448.8679.

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La ciudad de Evanston está obligada a hacer accesibles todas las reuniones públicas a las personas minusválidas o las quines no hablan inglés. Si usted necesita ayuda, favor de ponerse en contacto con la Oficina de Administración del Centro a 847/866-2916 (voz) o 847/448-8052 (TDD).



DRAFT

MEETING MINUTES

HOUSING AND HOMELESSNESS COMMISSION

Thursday, November 1, 2018, 7:00 P.M.
Lorraine H. Morton Civic Center, Room 2402

Present: Chair Ellen Cushing, Alderman Eleanor Revelle, Monika Bobo, Larry Donoghue, Moika Long, Renee Phillips

Absent: Vice-Chair Geri Palmer, Noelle Gilbreath, Mark Kruse

Staff: Savannah Clement, Housing Policy and Planning Analyst

Call to order

Chair Ellen Cushing called the meeting to order at 7:03 PM with a quorum present.

Approve minutes of October 4, 2018 meeting

Larry Donoghue moved for approval, and Alderman Revelle seconded, and the motion was approved 5-0. Chair Ellen Cushing suggested adding language about Affordable Housing Definition being outdated. Staff will include in the approved minutes.

Public comment

Doreen Price provided public comment on the amended Inclusionary Housing Ordinance.

Demolition Tax Increase Discussion Continued

Commissioners asked questions about the feasibility of demolition fees on commercial buildings. Alderman Revelle noted that both Palo Alto and Boston have fees based on square footage. Commissioners asked questions about whether Palo Alto's and Boston's fees were around tearing down residential to build commercial, or tearing down commercial to build commercial? Chair Ellen Cushing said that she received information stating that one reason commercial buildings don't currently pay demo fees is because they already have a higher tax rate to start with. Staff will check with the Law Department and Economic Development on the feasibility of implementing demolition fees on commercial teardowns.

Commissioners also discussed the possibility of applying the demolition fee to rehabs and additions. There was a question about when to collect the fee if basing it off of the difference in value between old structure and new. Staff will look into the City's building permit fee process and see if it makes sense to collect the demolition fee when residents are applying for a certificate of occupancy.

Commissioners asked what the primary purpose is for the demolition fee: discouraging teardowns of more moderately priced homes, or generating revenue for affordable housing. Commissioners agreed that both reasons should be the purpose.

Staff will research what went in place of five houses that were demolished in 2018.

Staff said the Commission could raise the demolition fee as a baseline. Then have a graduated fee based on the difference in value percentage between the structure demolished and the new structure built in its place. For example, if the new building is valued at 150% more than the structure torn down, then it'd have to pay a higher demo fee. The fee would go up the more the percentage increases.

Commissioners agreed to work on updating the Affordable Housing Fund description and create a better definition of demolition. Staff will create a Google doc for Affordable Housing Fund description revisions.

Staff Reports

Staff provided updates on the Inclusionary Housing Ordinance, Affordable Housing Plan Steering Committee, and other housing activities. Staff will send Commissioners the overall housing work updates memo and chart that was included in the October 29th City Council packet.

Chair's Report

No report.

New/Other Business

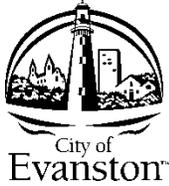
No new business.

Adjournment

Moika Long motioned to adjourn, Monika Bobo seconded, and the motion was unanimously approved. The meeting was adjourned at 8:17 p.m.

The next scheduled meeting of the commission is Thursday, November 1, at 7:00 p.m. in room 2402.

Respectfully submitted,
Savannah Clement, Housing Policy and Planning Analyst



Memorandum

To: Members of the Housing and Homelessness Commission

From: Sarah Flax, Housing and Grants Administrator
Savannah Clement, Housing Policy and Planning Analyst

Subject: Age-Friendly Evanston Affordable Senior Housing Feasibility Study

Date: November 27, 2018

Recommended Action:

Staff recommends approval by the Housing and Homelessness Commission of a \$2,500 grant to the Age-Friendly Evanston Task Force Housing Committee for an Affordable Senior Housing Feasibility Study. HHC's recommendation will go to the Planning and Development Committee on January 14, 2019, for approval.

Funding Source:

The funding source is the City's Affordable Housing Fund, 250.21.5465.62490. The Affordable Housing Fund has a current uncommitted cash balance of approximately \$800,000; including \$50,000 budgeted for other program costs in FY2019.

Livability Benefits:

Built Environment: Support housing affordability;

Equity & Empowerment: Ensure equitable access to community benefits, and support poverty prevention and alleviation.

Discussion:

In December 2013, the mayor of Evanston appointed an Age-Friendly Evanston Task Force that was charged with a mandate to develop an Age-Friendly Action Plan for the City based on the World Health Organization (WHO) model. On June 20, 2016 the City Council accepted the Age-Friendly Action Plan which included recommendations to address unmet housing needs for older adults in Evanston.

The Age-Friendly Action Plan identified a number of barriers to developing new affordable, senior housing in Evanston. These barriers include developer difficulty with finding and securing land and financing for affordable units. This particularly affects development of affordable assisted living facilities because the State of Illinois has not issued new licenses for Supportive Living Facilities (SLFs) that are funded primarily with Medicaid, in the wake of the financial crisis beginning 2008.

To address these housing issues, the Age-Friendly Action Plan recommended four items for action:

- Expand Affordable Housing through Community Land Trust Ventures
- Expand Shared Housing Opportunities
- Expand Opportunities for Subsidized Assisted Living
- Explore Innovative Approaches to expand Affordable Housing Options

The Age Friendly Evanston Housing Committee determined that a housing feasibility study was needed to move forward with the third action item. An expert advisor, interviewed by the Housing Committee, suggested contacting Sawgrass Partners to conduct the feasibility study. The Housing Committee contacted Sawgrass Partners, and asked it to prepare a proposal for a feasibility study/market assessment of senior housing in Evanston. The study would consist of: market analysis and a demographic profile, competitor profile and analysis, and market penetration rates for independent and assisted living, as well as the estimated demand for independent and assisted living (affordable and market rate).

The cost for the study/assessment by Sawgrass Partners is \$7,500. The Housing Committee applied to the Evanston Community Foundation for funding and was awarded a \$5,000 grant In October 2018. The Housing Committee is now requesting funding from the Affordable Housing Fund to cover the remaining \$2,500 for the study.

Attachments:

- Age-Friendly Evanston Housing Committee application
- Age-Friendly Evanston Market Assessment Proposal from Sawgrass Partners
- Letters of Support

APPLICATION FORM

Affordable Housing Fund

Include these attachments with your application:

- Organization's most recent completed fiscal year budget and current year budget
- Organization's non-discrimination, equal employment opportunity and affirmative action plan
- Audited financial statement and Form 990 for the most recent completed fiscal year
- Evidence of non-profit status
- Plan to address accessibility issues, including who to contact with questions/issues, policies for responding to grievances/complaints and the time period for providing a written response (new applicants or previously funded agencies if changed).
- Completed Conflict of Interest Disclosure form

Please submit 1 hardcopy and 1 electronic copy of your application and attachments. For questions, contact Savannah Clement, Housing Policy and Planning Analyst.

AGENCY: Age Friendly Evanston Task Force Housing Committee

PROGRAM NAME: Affordable Senior Housing Feasibility Study

CONTACT PERSON: Susan Cherco

EMAIL: sjcherco@gmail.com

ADDRESS: 2404 Prospect Ave., Evanston, IL 60201

AMOUNT REQUESTED: \$ \$2,500

PROGRAM DESCRIPTION

- 1. Provide a summary of your program, including the need(s) that it addresses. How long has your program existed and how has it grown or changed? How long do you expect to continue providing this service?*

In December 2013 the mayor of Evanston appointed an Age-Friendly Evanston Task Force that was charged with a mandate to develop an Age-Friendly Action Plan for the City based on the World Health Organization (WHO) model. The WHO model identifies eight aspects of community life and establishes age-friendly guidelines for each. The Task Force Housing Committee is one of the eight committees. On June 20, 2016 the City Council approved the Age-Friendly Action Plan which included recommendations from the Housing Committee that address unmet housing needs for older adults in Evanston. (See questions 2 & 4 for details.)

On the suggestion of one expert advisor interviewed the Committee contacted Sawgrass Partners, which specializes in strategic, market and financial planning and project development for senior housing projects. Sawgrass Partners was asked to prepare a proposal for a feasibility study/market assessment of senior housing in Evanston in order to pursue further discussion with financing sources and developers. The study would consist of: market analysis and demographic profile, competitor profile and analysis, and market penetration rates for independent and assisted living and estimated demand for independent and assisted living (affordable and market rate). This current market intelligence can be used to develop the Project's positioning and pricing relative to its competition. The cost for this study/assessment is \$7,500 – which reflects significant financial consideration by Sawgrass Partners.

In August 2018 the Housing Committee applied to the Evanston Community Foundation for a rolling grant of \$5,000 to fund this study. The Committee was notified in October, 2018 that its application had been approved and \$5,000 has been awarded towards payment for the Sawgrass study.

2. *Who participates in or benefits from your program or services? Describe them in terms of age, gender, race/ethnicity, family status, income level and other relevant or defining characteristics. Detail any eligibility requirements.*

Task Force Committees have focused on the needs of older adults in the community. The Housing Committee identified a lack of affordable housing options as a major concern of older adults and one of the reasons older adults find themselves forced to leave the community. There is a shortage of independent living senior apartments in Evanston forcing those who do not qualify for subsidized housing and cannot afford market rate housing to move out of the community. In addition, and importantly, there are no affordable assisted living units in Evanston. Currently older adults in the community have three housing options: stay in independent living and receive inadequate care, leave the community, or move to a nursing home which offers a high level of care but minimal independence. (See question 4 for demographics and housing data)

3. *What other agencies or programs address this need, how do you collaborate with them to avoid duplication of services, and what successes and challenges have you experienced? What sets your services apart from others? (Include agencies that serve Evanston residents but are not located here.)*

The Housing Committee supports Joining Forces for Affordable Housing and other groups advocating for affordable housing. Letters of support for this proposal are attached, demonstrating there is a need for the study to identify gaps in senior housing.

4. *Discuss the need for this type of service including:*
- *existing level of services*
 - *how the need has changed over the past two to three years,*
 - *the gaps in providing this service*

According to the 2010 U.S. Census, 32.5% of total households in Evanston included resident 65 years and older, 10.5% of whom are living alone. The 2009 Report of the Evanston Task Force on Affordable Housing and the 2008 Business from the Public Interest identified that access to affordable and appropriate housing is an issue for older adults in Evanston.]

The Housing Committee confirmed these reports in the findings from multiple community outreach forums, surveys and extensive interviews, site visits and data collection. It was also corroborated by older adults who live in Evanston and want to remain in Evanston. However, the Committee found while the advantages of Evanston are many, there are also challenges impeding residents' ability to remain in the community. Increasingly unaffordable housing was one of the top two issues cited. According to the Age-Friendly 2015 survey responses, 43% of respondents reported housing to be the most critical measure in the Evanston community. Additionally, approximately 30% of survey respondents said they worry about being able to stay in their homes in Evanston due to cost.

Evanston lost over 3300 housing units affordable to renters with incomes that do not exceed 60% of the area median income and owners whose incomes do not exceed 80% of the area median income over a 10-year period (2004-2013), which has placed dramatic pressure on senior residents looking for suitable and affordable housing. The addition of 329 affordable units added from 2005-2015 has made a slight, but not significant, contribution to the availability of affordable and senior appropriate housing.

There are a number of barriers to developing new affordable, senior housing. Developers find it difficult to secure land and financing to make the provision of affordable units. Cost effective and existing tools such as the State of Illinois program for Supportive Living Facilities (SLFs) (for assisted living services) have been placed on hold for new waivers

(licenses) in the wake of the financial crisis beginning 2008.

To address these issues, the Housing Committee's action plan (submitted and approved by the City Council in summer of 2016 as part of the Age-Friendly Action Plan) recommended four items for action:

- Expand Affordable Housing through Community Land Trust Ventures
 - Expand Shared Housing Opportunities
 - Expand Opportunities for Subsidized Assisted Living
 - Explore Innovative Approaches to expand Affordable Housing Options.
5. *Complete the chart below with the unduplicated total of people you expect to serve in 2016, number that are low/moderate income, and the number of them that are Evanston residents. If an existing program, provide the same numbers for 2015*

Unduplicated people to be served in 2016

Unduplicated Evanston residents to be served in 2016

Unduplicated low/moderate income people to be served in 2016

Unduplicated low/moderate income Evanston residents to be served in 2016

Unduplicated people to be served in 2015

Unduplicated Evanston residents to be served in 2015

Unduplicated low/moderate income people to be served in 2015

Unduplicated low/moderate Evanston residents to be served in 2015

N/A: The Housing Committee is not a direct service provider.

6. *Describe your program. Be specific about the activities/services provided, days/times of services and the frequency/duration of service for the average participant. Is there a wait list? If yes, explain its size and the length of wait time.*

N/A: The Housing Committee is not a direct service provider.

7. *Describe the number, qualifications and experience of program staff. Will new staff be hired and is this dependent on City funding? Will the staff be retained if City funding is not received in future years?*

Sawgrass Partners, based in Glenview, is a full-service advisory firm specializing in strategic, market and financial planning and project development for senior living providers. Prior to forming Sawgrass Partners in 2004, the principals were long-standing members of the Senior Living Practice at KPMG, LLP, which was widely recognized as the leading consulting and financial feasibility firm serving the senior living industry. Chicago area clients include Chicagoland Methodist Senior Services, Friendship Village of Schaumburg, Montgomery Place and Three Crowns Park. (Additional information is provided in the proposal which is attached.)

8. *Describe program goals and outcomes you anticipate in 2016, including any change from 2015. What data are collected and used to analyze your program and measure success? Who is responsible for ensuring the program is implemented as planned?*

Initially, Sawgrass Partners will prepare a request for information needed to conduct the study and facilitate a kick-off meeting to agree on schedules, objectives, expectations, participants and deliverables. The deliverable itself will be an executive-style summary report of findings and recommendations based on the market research and analysis for the study, including potential need for housing and services at various price points in the Evanston market, and observations and

recommendations regarding plans for a proposed Project. Sawgrass Partners estimate that the study/market assessment can be completed within four to six weeks from the time of the kick-off meeting and receipt of all necessary information.

9. *Where (address/location) does your program take place and how will clients get to the location or facility?*

N/A

10. *Is this location in compliance with the requirements of the federal ADA (Americans with Disabilities) Act? N/A*

Yes

No *If "No," explain how disabled clients will be able to access the program.*

11. *How is eligibility for this program determined and what demographic data are collected about clients?*

N/A

12. *Provide a summary of your organization's mission and work including services, organizational structure, size and functions of the board, and any significant changes in the last year.*

N/A

13. Program Outcomes and Indicators

Outcome (What is the program designed to achieve?)	Indicator (How is success determined?)	Number or percent of total that will achieve this
Completed Affordable Senior Housing Feasibility Study	Confirmation of the demand and need for a mixed income, mixed level senior housing development as proposed by the Committee or for a revised project size and/or configuration based on the market study. As the feasibility study/market assessment determines demand and demonstrates the parameters for such a project, the Committee will work to solicit interest from developers and financing sources.	

BUDGET

Complete the table below for your program budget. Total revenues should be equal to or greater than total program expenditures. Line item expense and revenue descriptions should match your chart of accounts. If your program is new, leave fiscal year 2015 blank. Include all funding sources/revenues for your program. Total sources/revenues should equal total uses/expenses. Line items must match your chart of accounts/operating budget. Show any source of funding of \$20,000 or more in a separate line. Show any grants/donations that have been secured, and unrestricted revenues that are committed to this program, in the "2016 Committed" column.

Line Item Revenues	2018	% of Budget	2019	% of Budget	2016 Committed
Evanston Community Foundation Grant	\$5,000	66.6%	N/A		
Affordable Housing Fund	\$2,500	33.3%			
Total Revenues:		100%		100%	

Line Item Expenses	2018	% of Budget	2019	% of Budget	2016 Committed
Sawgrass Partners	7,500	100%			
Total Expenses:		100%		100%	

Indicate your fiscal year. If requesting funds for an existing program, explain any significant differences in revenues or expenses between your 2015 and 2016 program budgets, particularly funding cuts from major funders such as the State of IL, and its impact on service levels, staffing, etc. Describe your efforts to secure other sources of funding and justify any increased request from the City of Evanston. Why is Evanston’s Affordable Housing Fund an appropriate funding source for this program?

The Age Friendly Task Force Housing Committee has secured two thirds of the funding for this project from the Evanston Community Foundation. The Evanston Affordable Housing Fund seems to be

an appropriate source for the balance of funding for this project given the City's approval of the Age Friendly Action Plan, commitment to seniors and to affordable housing.

1. City of Evanston Census: General Profile, Demographic Profile Data. City of Evanston, 2010
2. Evanston Affordable Housing Task Force (2009) Report submitted to the City Council.
3. Business and Professional People for the Public Interest Annual Report. *BPI. 2008*
4. Affordable Housing refers to housing units that are affordable by community residents whose income is below the median household income level.
5. Community Development "Tools to Expand Affordable Housing" June 8th, 2015 prepared by Sara Flax.
6. Based on census data, median cost of a house is \$395,000 and median monthly rental is \$1057
7. Community Survey for Age Friendly Action Plan. *City of Evanston, 2015.*

CERTIFICATION

Age Friendly Evanston Task Force

We, the undersigned duly authorized agents of Housing Committee (applicant), do hereby state, that to the best of our knowledge, the information contained in this application is true and correct. Applicant assures the City of Evanston that funds will be administered by the applicant, and that funds received shall be used solely for the purpose described in this application.

Susan Cherco, Chairperson

Name & Title

Susan Cherco

Signature

11/26/2018

Date

PROGRAM ADMINISTRATOR

Name

Signature

Date



DRAFT – For Discussion Purposes

Ms. Margaret Gergen
Age Friendly Evanston Task Force Housing Committee

Via: Email

May 20, 2018

Dear Ms. Gergen,

We have enjoyed talking with you and learning more about Evanston’s efforts related to affordable housing and creating an “age-friendly” community, as well as your goals for developing an affordable housing options for Evanston’s older adults. To assist in the research and planning process, Sawgrass Partners is pleased to present our proposal to provide market assessment services. This letter addresses our proposed scope of services, engagement team, deliverables, timing and fees.

Background

In order to better meet the needs of the city’s current and future residents, the Mayor of Evanston established a nine member task force (the Task Force) with a mandate to develop an Age Friendly Initiative, including formulating a 3-year city-wide action plan for implementation. The Task Force is comprised of members appointed by the Commission on Aging, the Mental Health Board, the Human Relations Commission and the Evanston community at-large.

The “Age Friendly Evanston” Task Force will make recommendations to the Mayor and City Council of Evanston on the creation and implementation of an action plan based on the objectives of the World Health Organization’s Age Friendly Communities Program. This program is an international effort to help prepare for the rapid aging of populations, which a demographic trend impacting the U.S. as well as many other countries.

As part of this initiative, the Task Force has requested Sawgrass Partners provide a proposal to conduct a Market Assessment for a proposed project for older adults that may include up to 50 affordable independent living units, 50 affordable/subsidized



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assisted living units and 50 market rate assisted living units (referred to herein as “the Project”).

The following section of this letter outlines the scope of services we propose to provide you in connection with your request.

Market Assessment - Scope of Services

As part of our Market Assessment process, we would prepare a request for the information we will need to conduct our engagement and facilitate a kick-off meeting/conference call to agree on schedules, objectives, expectations, participants and deliverables, as well as to review the requested information.

The objective of the Market Assessment is to review the important characteristics of the market to be served (Area Analysis and Demographic Profile) and analyze the competitive environment from a product and pricing standpoint (Competitor Profile and Analysis), including computing market penetration rates for independent living and assisted living.

The results of the Market Assessment will serve as a basis for estimating demand for independent living and assisted living (affordable and market rate) in the defined market area. Furthermore, our analysis of existing and proposed competitors in the defined market area will provide current market intelligence that can be used to determine the Project’s positioning and pricing relative to its competition.

Following is an outline of the basic matters considered for each component of the Market Assessment and the primary procedures to be performed.

Area Analysis and Demographic Profile

To obtain and provide an understanding of the demographic, economic and regulatory environment in the market area, we will perform the following tasks:

1. Obtain and review City of Evanston (herein defined as the primary market area) demographic information for 2018 and 2023 pertaining to individuals and households residing within the primary market area, including the following as available:



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- Age distribution and demographic trends of the population to estimate the number and proportion of individuals age 65 and over within the primary market area and to determine the future trends of the senior population;
 - Demographic characteristics, such as mobility limitations and those living alone, to estimate demand for services and care needs of the senior population; and
 - Home ownership and income patterns within age groups.
2. Review relevant residential real estate trends and activity.
 3. Review and document relevant licensure requirements that may affect the development and operation of the Project, as applicable.

Competitor Profile and Analysis

To obtain and provide an understanding of the competitive environment in the primary market area, we will perform the following tasks:

1. Contact, via phone or in person, senior living communities in the market area (affordable independent living and both affordable and market rate assisted living) to determine the following:
 - Location;
 - Number of units and related square footages, by unit type;
 - Pricing structure;
 - Occupancy levels; and
 - Plans for expansion.
2. Contact the appropriate state and local government agencies and planning and development offices to obtain information regarding any communities proposed or currently under development.
3. Summarize estimated and projected demographic characteristics for the primary market area and compute project and market penetration rates for independent living and assisted living.
4. Prepare a map of the primary market area indicating the location of the Project and existing and planned competitors.



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5. Summarize key observations and provide preliminary recommendations based on the results of the Market Assessment and discussions with you regarding the development of the Project.

Engagement Deliverable

The deliverable for this engagement will be an executive-style summary report of our findings and recommendations based on our market research and analysis for the Project, including the following:

- Definition and map of the primary market area indicating the proposed location of the Project (if known) and the location of existing and proposed providers/competitors;
- Demographic statistics and projections, as well as real estate data;
- A summary of the competitor information gathered in the primary market area provided in comparative format;
- Current and projected project and market penetration rates for independent and assisted living services; and
- Our observations and recommendations regarding the plans for the proposed Project and potential need for housing and services at various price points in the Evanston market.

We would expect to review a draft of the Market Assessment with you prior to finalization. This interactive process provides an opportunity to enhance the findings by incorporating your valuable input.

Our report may not be used by or otherwise distributed to any third-parties for obtaining financing or any other purpose without our prior consent.

Engagement Team

Our engagement team is composed of professionals with significant relevant industry experience, as well as significant experience with engagements of this nature. You can be assured of our prompt attention and priority service throughout the engagement.



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Janice Maloney will assume responsibility for the overall coordination, technical direction and satisfaction of your objectives relative to the engagement. She will participate in and review every aspect of the work effort, including the competitive site visits, and will participate in the preparation and presentation of the report.

Teresa Black will be responsible for the collection, review and analysis of all information related to the Market Assessment and will assist in formulating observations and recommendations.

We have extensive experience working with aging services organizations throughout the country. Following are references for three clients in the Chicago area for whom we have provided market research services. We have also provided a representative client list as an attachment hereto, and are happy to provide additional references or detailed information about specific projects and engagements should you so desire.

Ms. Marie Carlson
VP, Corporate Business
Development
Lutheran Life Communities
Arlington Heights, IL
(847) 754-3610

Mr. Phil Hemmer
Executive Director
Three Crowns Park
Evanston, IL
(224) 420-3011

Mr. Bill Lowe
President & CEO
Chicago Methodist Senior
Services
Chicago, IL
(773) 596-2300

Professional Fees and Timing

Based on the scope of services outlined herein, the professional fees for the Market Assessment will be \$7,500.

We would not expect our fees to change unless the scope of our work changes significantly from the approach outlined in this proposal. In addition to professional fees, we are reimbursed for out-of-pocket expenses such as the purchase of demographic data, *at cost*.

We estimate that the Market Assessment can be completed within four to six weeks from the time we conduct the kick-off meeting and receive all necessary information. This schedule assumes the timely receipt of all requested information and the ability to efficiently schedule necessary meetings and calls.



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As customary, we will require a \$2,500 retainer at the commencement of the engagement, which will be applied against our final invoice. The remainder of our professional fees and expenses will be billed at the end of the engagement. Payment of our fees and expenses is due within 20 days of your receipt of our invoice. If the engagement is terminated for any reason, we will charge only for those fees and expenses related to the work completed to the point of termination. Payment of our fees is not contingent upon the results of our work or the ultimate viability of a project.

We are prepared to begin this engagement upon the acceptance of our proposal by you along with payment of the above-referenced retainer. We appreciate the opportunity to be of service to you and are committed to helping you accomplish your objectives in an efficient and cost-effective manner. If you have any questions or wish to review the proposal, please feel free to contact me at (847) 724-1759.

Very truly yours,

Sawgrass Partners LLC

Janice P. Maloney

Janice P. Maloney
Principal

Attachments:

- I. Background and History of Sawgrass Partners
- II. Engagement Team Resumes
- III. Representative Experience



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ACCEPTED:

Authorized Signature

Title

Date

Sawgrass Partners

Background and History

A) *Business Overview*

Sawgrass Partners is a full-service advisory firm specializing in strategic, market and financial planning, project development and repositioning services for senior living providers. We offer an alternative to traditional “turn-key” developers by providing our clients flexibility in how they utilize our services. This allows our clients to take a more active role in the planning and development process, while still reaping the benefits of an experienced and objective advisor. Our clients determine the level of involvement they wish to have in the development process. Because our clients must “live with” the outcomes, we encourage their active involvement in the decision-making process, rather than relying solely on the development team.

Sawgrass Partners is guided by the following five principles:

- ***Experience*** – our aim is to turn our knowledge and experience into value for the benefit of our clients.
- ***Integrity*** – we maintain an unwavering commitment to ethical conduct and the highest level of integrity.
- ***Objectivity*** – our advice is valuable only if it reflects an unbiased view based on our industry knowledge and experience, rather than being merely a precursor to further services.
- ***Service*** – we take pride in understanding our clients and are committed to providing them with high-quality services that are responsive to their needs and objectives.
- ***Confidence*** – our ultimate objective is to allow our clients to feel confident in selecting and executing a plan that successfully implements their mission and achieves their goals.

B) Firm History

Prior to forming Sawgrass Partners in 2004, our principals were long-standing members of the Senior Living Practice at KPMG LLP, which was widely recognized as the leading consulting and financial feasibility firm serving the senior living industry. Each of our principals has significant knowledge of, and experience in, the senior living industry, and all have participated in numerous consulting and advisory services engagements for senior living organizations. Collectively, our experience in the senior living industry totals more than 60 years and 100 successful senior living developments, and includes strategic planning, market assessments, financial planning and analysis, and repositioning and development advisory services. In addition, we have long-standing working relationships with the other professional firms serving the senior living industry, including bankers, architects, contractors, marketers and developers, feasibility consultants and attorneys.

C) Experience and Areas of Expertise

The professionals at Sawgrass Partners are well known and respected throughout the senior living industry for their technical knowledge, service orientation, quality of work and integrity. As former feasibility consultants, we understand what is required for a successful project, and both our clients and the capital markets relied on us to form and report our objective, expert opinion on the market and financial viability of senior living projects being brought to market. Our areas of expertise are described below.

Business and Strategic Planning - *determining future direction*

Business and strategic planning enables an organization to assess its current situation and establish its future direction. We facilitate the strategic planning process, helping our clients assimilate their mission, vision, strengths and market opportunities into an attainable, supportable and comprehensive strategic plan.

Market Assessment - *defining market opportunity*

A market assessment is a crucial first step in the campus development or repositioning process. Our market assessment provides a basis for determining market needs, facility design, positioning, programming, amenities, and pricing.

Direct Consumer Research – *establishing project parameters*

Direct consumer research through focus groups or direct mail surveys enables our clients to understand the needs and preferences for senior living services in a market area and allows for the uniqueness and preferences of the local market to be incorporated into project design and pricing. Direct consumer research can also assist in the development of a preliminary lead base for a project.

Financial Planning and Analysis - *evaluating financial feasibility*

We develop “real time” and comprehensive financial models that provide our clients the opportunity to evaluate the financial implications of their plans, identify and evaluate options and alternate courses of action, establish realistic operating and financial assumptions and targets, and identify and assess relevant risk factors.

Financial Advisory Services - *identifying financing alternatives*

Our financial advisory services enable our clients to identify and evaluate their financing alternatives and funding sources, and negotiate favorable financing terms. We are a resource for securing seed capital and permanent financing for projects, identifying short and long-term funding sources, and assessing available options.

Master Development Planning - *establishing a development blueprint*

The Master Development Plan serves as the blueprint for the development or repositioning of a senior living community. We work with management and its project team, including architects, engineers, contractors, bankers and others, to prepare a comprehensive guide for the development process that includes project concept and programmatic design, development and operating budgets, service packages and pricing, marketing and operating plans, plan of finance, and critical time lines and responsibilities.

Campus Development and Repositioning - *managing the development process*

We help our clients effectively manage and coordinate each phase of the development process, including pre-financing, construction and operations. Our role on the development team is a function of the level of assistance required by our clients in performing or managing the key elements of the development process, including:

- Market planning
- Financial analysis
- Master development planning
- Project team selection
- Financing
- Construction management
- Operations
- Program and facility design and approvals

Sawgrass Partners
Engagement Team Resumes

Janice Maloney

Ms. Maloney has over 25 years' experience in the planning, development and financing of senior living facilities. Ms. Maloney has worked with aging services providers across the country and was a partner other senior living development, management and marketing firm.

Relevant Experience:

- Leading organizations in the development of new and repositioned continuing care retirement communities, including facility design, program and service plans, marketing and operating plans, and financing alternatives.
- Preparing financial projections and forecasts for senior living providers, as well as analyzing the financial impact of adding new lines of service.
- Preparing financial feasibility studies to be included in public and limited use offering documents for the sale of tax-exempt and taxable bonds.
- Facilitating the development of strategic plans, including analyzing strategic options and initiatives and participating in the formation of long-term care strategic alliances.
- Conducting market demand analyses for senior care and retirement housing providers, including demographic and competitive analysis to analyze market demand for prospective new communities and to determine appropriate project size.
- Conducting primary market research, including developing and administering surveys and facilitating focus group discussions.
- Preparing and conducting benchmark studies.

Education: Ms. Maloney received a Bachelor of Science in Management from Indiana University and a Master of Business Administration with concentrations in Finance and Health Care Administration from the University of Illinois at Chicago.

Sawgrass Partners
Engagement Team Resumes

Teresa Black

Ms. Black has over 15 years' experience performing consulting engagements in the areas of market assessments, strategy and planning analyses and market feasibility for senior living providers.

Relevant Experience:

- Conducting market assessments for senior living providers to analyze the market viability of prospective new communities and additions, and to determine appropriate project size.
- Gathering market data, conducting site visits and reporting demographic and market information for financial feasibility studies.
- Preparing market demand analyses involving the determination of target market areas and the consideration of economic, demographic and competitive factors.
- Conducting direct consumer research, including mail surveys and focus groups.
- Summarizing and analyzing consumer research preferences related to residence types, pricing, services and amenities of proposed senior living projects.
- Participating in strategic analyses and planning for senior living providers.
- Performing due diligence procedures for senior living organizations.
- Researching industry topics and facility information using various on-line tools.

Education: Ms. Black received a Bachelor of Science in Business Administration in Marketing from the University of Illinois Champaign-Urbana.

Sawgrass Partners

Attachment III

Listing of Prior Experience

Our client service team has extensive experience with other senior living providers in the Chicagoland area and throughout the country. The following is a partial list of clients for whom we have provided services. We would be happy to provide additional information about specific projects or contact information should you so desire.

Chicagoland Clients:

- Bethany Methodist Corporation
- Bethesda Rehab & Senior Care
- Central Baptist Village
- Chicagoland Methodist Senior Services
- Franciscan Ministries
- Friendship Village of Schaumburg
- Greek American Rehab & Care
- Lutheran Life Communities
- Monarch Landing
- Montgomery Place
- Northwest Home for the Aged
- Providence Life Services
- Rolling Hills Campus
- The Scottish Home
- Smith Senior Living
- Three Crowns Park
- Wyndemere

Other Clients Nationwide:

- Beatitudes Campus
Phoenix, AZ
- Friendship Retirement Corporation
Glendale, AZ
- Paradise Valley Estates
Fairfield, CA
- Witham Health Services
Lebanon, IN
- Village Shalom
Overland Park, KS
- Fox Hill
Bethesda, MD
- Clark Retirement Community
Grand Rapids, MI
- Friendship Village of Kalamazoo
Kalamazoo, MI

- Glacier Hills
Ann Arbor, MI
- Benefis Senior Services
Great Falls, MT
- Immanuel Lutheran Communities
Kalispell, MT
- Jewish Community Housing Corporation
West Orange, NJ
- Southeastern Retirement Associates
Charlotte, NC
- United Methodist Retirement Homes, Inc.
Durham, NC
- Eliza Jennings Senior Care Network
Cleveland, OH
- Episcopal Retirement Homes
Cincinnati, OH
- Maple Knoll Communities
Cincinnati, OH
- Masonic Care Community of NY
Utica, NY
- Pacific Retirement Services
Medford, OR
- Parkview Christian
Portland, OR
- Morningstar Senior Living, Inc.
Nazareth, PA
- Pine Run Community
Doylestown, PA
- Moravian Manor
Lititz, PA
- Virginia United Methodist Homes
Richmond, VA
- Capitol Lakes
Madison, WI
- St. Camillus and San Camillo
Wauwatosa, WI



connections
FOR THE HOMELESS

2121 Dewey Avenue

Evanston, IL 60201

November 26, 2018

**Betty A. Bogg
Executive Director
Connections for the Homeless
2121 Dewey Ave.
Evanston, Illinois 60201**

Dear Members of the City of Evanston Housing & Homelessness Commission:

I am happy to provide this letter in support of the City of Evanston's Age-Friendly Evanston Task Force's application to the Housing & Homelessness Commission for a grant of \$2,500. Since the Task Force's inception in 2014, Connections for the Homeless has closely followed the work of Age-Friendly Evanston and has been particularly impressed with its analysis related to housing for seniors.

We agree that the next logical—and necessary—step to address the need for affordable assisted living facilities is the Feasibility Study proposed by the Task Force. We believe that the Task Force has done an admirable job in defining the need, researching solutions to the need, investigating consultants who can complete this next step, and understanding the necessity for such a Feasibility Study in moving development of an assisted-living project forward. We are doubly impressed that they are taking charge of funding the majority of the cost of the Feasibility Study during this period where the City of Evanston budget is of such concern.

Connections for the Homeless serves and catalyzes our community to end homelessness, one person at a time. We recognize that safe, stable housing is the foundation from which our clients can grow and work toward their full potential. Since 1984, we have remained driven by values that promote equity and inclusion, foster community collaboration, and honor the resilience of the people we serve. It is with these values that we work across the northern suburbs to prevent homelessness, shelter those in crisis, house individuals and families, and organize our community to create and inspire lasting, systemic change.

We feel that the work of the Age-Friendly Evanston Task Force aligns directly with our mission and our values. Age-Friendly Evanston participates actively in the advocacy coalition we lead, Joining Forces for Affordable Housing, and we see the

project they are proposing as an integral part of our vision for addressing the affordable housing shortage in Evanston. We hope that you will grant their request and help the community take this next important step.

Sincerely,

A handwritten signature in blue ink, appearing to read "Betty A. Bogg". The signature is fluid and cursive, with the first name "Betty" and last name "Bogg" being the most legible parts.

Betty A. Bogg, Executive Director
Connections for the Homeless

November 26, 2018

City of Evanston Housing and Homelessness Commission
Ellen Cushing, Chair
Morton Civic Center
2100 Ridge Ave.
Evanston IL 60201

Dear Ms. Cushing and Member of the Commission:

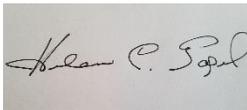
I am writing in support of the pilot project proposed by the Age-Friendly Evanston Task Force Housing Committee, and ask that you approve their request for \$2,500 to complete the feasibility study outlined in the project proposal.

As a member of the Age-Friendly Task Force, I am impressed by the resourcefulness and ingenuity of the housing committee in not only designing a much-needed study, but also securing the expert counsel needed to complete it (and at a below-market rate, I might add). As a former executive director of North Shore Village, a non-profit organization whose mission includes helping seniors and families identify a broad range of options for how and where to live, I encountered more than a few older adults who feared they were being priced out of Evanston. And, as an older adult living on a fixed income, I share that concern.

The Age-Friendly Task Force, as well as other housing-focused organizations serving Evanston, has presented both anecdotal and evidence-based documentation that the need for a broader range of affordable options for seniors is great, and the time to address it is now. Thanks to the task force members' diligence in designing the feasibility study and securing an expert resource to carry it out, we can anticipate having an up-to-date market analysis that can be used to design affordable housing solutions for older adults in Evanston.

Please give this proposal your careful attention and your support.

Sincerely,

A rectangular box containing a handwritten signature in black ink. The signature appears to read "Helen C. Gagel".

Helen C. Gagel

804 Oakton, Evanston



November 26, 2018

Ellen Cushing, Chair
City of Evanston Housing and Homelessness Commission

Board of Directors

Nancy Bashook
Ifaat Bosse
Carolyn DeSwarte
Gifford
Jessica T. Feldman
Kristin Gover
Marla Johnson
Jacki Kimel
Marguerite O'Connor
Jennifer O'Neil
Linda Rockwell
David Terman
Judy Witt
Herb Wolf

Advisory Council

Charlotte Bishop
Nancy Flowers
Kim Hand
David Jacobson
Audrey Thompson

Executive Director

Marie O'Connor

Member Engagement

Mary Shaughnessy

Volunteer Coordinator

Mary McCulloch

Dear Ms. Cushing:

We are happy to provide this letter supporting the Evanston Age-Friendly Task Force's grant request that will support a feasibility study of options for senior-focused affordable housing in Evanston.

North Shore Village was created in 2010 and is rooted in the national "village" concept. It is a non-profit organization of older adults committed to helping one another live purposeful lives by providing members and their families with information about a broad range of options for how and where to live; fostering a culture in which all our members benefit from both giving and receiving; connecting our members with a range of services; and offering a variety of programming and social activities.

More than 26% of seniors over 65 and half of those over 85 are living alone. Many find their supportive circle of family and friends shrinking, leading to isolation. Among other things, we know from recent research that both social isolation and loneliness:

- Are associated with a [higher risk of mortality](#) in adults aged 52 and older
- Can negatively affect both physical and mental health
- Contribute to cognitive decline and risk of dementia
- Result in long-term care more likely to be needed

Providing seniors with a variety of affordable housing options is a critical component of sustaining and supporting people as they navigate the full spectrum of aging and avoid isolation.

We believe that the work of the Age-Friendly Evanston Task Force aligns with our mission and our values. We see the project they are proposing as an integral part of our vision for addressing the affordable housing shortage in Evanston. We encourage you to grant their request and help the community take this important next step.

Sincerely,

Jennifer Lee O'Neil
Board President

Marie O'Connor
Executive Director

Cc: Savannah Clement, Housing Policy and Planning Analyst, Community Development, City of Evanston

2025 Sherman Ave.

Evanston, IL 60201

November 24, 2018

City of Evanston Housing & Homelessness Commission

Attn: Ms. Cushing, Chair

2100 Ridge Ave

Evanston, IL 60201

Dear Ms. Cushing and Commission Members,

As a citizen, as a senior and as a former alderman, I am enthusiastically supporting the Age-Friendly Task Force application and action plan for funding a feasibility study for affordable senior housing in Evanston. I am pleased that the ECF has granted the initial \$5,000, and request your help in convincing the city to provide the remaining \$2,500 necessary. Our city has many options for affluent seniors to reside in luxury surroundings, but sorely lacks housing for the low to middle income senior—especially if they need assisted or supportive living arrangements.

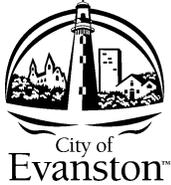
As a member of North Shore Village, a membership organization, I can testify to the desire of the majority of seniors to remain in their own home as long as possible. They may also desire to downsize from a single-family home to a smaller affordable apartment...if they can find one. The Age-Friendly Task Forces is determined to create such just opportunities. The feasibility plan is the first step.

As a city, we have discussed, debated, speculated and studied how to increase affordable housing, often without considering seniors of modest means. As an alderman, I participated in these discussions, often to little avail. The Sawgrass Partners will bring solid data to their market analysis. It will provide a strong basis for developers and bankers to make decisions about real needs in our community.

This is a firm, well-thought out action plan, and I heartily support awarding the remaining funds from the city needed to make it possible.

Sincerely,

Cheryl Wollin



Memorandum

To: Members of the Housing and Homelessness Commission

From: Sarah Flax, Housing and Grants Administrator
Savannah Clement, Housing Policy and Planning Analyst

Subject: Community Partners for Affordable Housing Proposals for the Continued Administration of the Inclusionary Housing Ordinance Waitlist

Date: November 28, 2018

Recommendation:

Staff recommends approval of \$28,675 for Community Partners for Affordable Housing (CPAH) to continue administering Evanston's Inclusionary Housing Ordinance ("IHO") centralized waitlist and conduct income certifications and recertification of households for inclusionary units. This recommendation will go to the Planning and Development Committee for approval on January 14, 2019.

Funding:

The funding source is the City's Affordable Housing Fund, 250.21.5465.62490. The Affordable Housing Fund has a current uncommitted cash balance of approximately \$800,000; including \$50,000 budgeted for other program costs in FY2019.

Livability Benefits:

Built Environment: Support housing affordability;

Equity & Empowerment: Ensure equitable access to community benefits, and support poverty prevention and alleviation.

Discussion

CPAH is requesting a \$28,675 grant from City of Evanston for services to administer Evanston's IHO and centralized waitlist. This funding would be used for both personnel and non-personnel costs associated with the management and implementation of the centralized waitlist for Evanston residents interested in affordable housing through the IHO, and other market rate developments with onsite affordable units. The scope of work includes pre-screening interested applicants for the waitlist, conducting outreach, income qualifying prospective tenants when affordable units are ready for rent up, re-certifying incomes of tenants already housed in affordable units, and meeting with City staff and developers as needed to discuss upcoming available units.

City staff anticipates the completion of 15 onsite affordable rental units at 1500 Sherman Ave (the Albion Residential building), in late 2019. CPAH would conduct

income certifications for households that would be referred for rent-up of those units. In addition, CPAH would complete income re-certifications for households in the four affordable units at 828 Noyes, the two onsite units at 1620 Central, and the one affordable unit at 1571 Maple.

The City of Evanston would enter into a 12 month contract for Affordable Housing Fund waitlist services with CPAH, from January 1 through December 31, 2019. If the affordable units at 1500 Sherman do not become available until 2020, the contract would roll over until rent-up of those units is complete.

Priority for affordable units is given first to qualified households who currently live in Evanston, or who have lived in Evanston with a member of a household currently living in Evanston, or to households in which the head of the household or the spouse or domestic partner works in Evanston. The City also plans to allow other developers and property managers with onsite affordable units to get referrals of income eligible prospects from the centralized waitlist.

The City would make two payments to CPAH in the amount of \$14,337.50 each, in April and October 2019, if funding is approved. CPAH staff would track time used for the administration of the City's IHO program and use this data to inform its proposal for funding renewal at the end of 2019. Additional information on CPAH's scope and budget can be found in the attachments.

Attachments:

CPAH's Proposal Narrative

CPAH's Proposal Budget



PROPOSAL FOR ADMINISTERING EVANSTON'S INCLUSIONARY HOUSING PROGRAM AND CENTRALIZED WAITLIST

Community Partners for Affordable Housing
400 Central Ave. # 111, Highland Park, IL 60035
847-681-8746; www.cpahousing.org

Proposal:

CPAH is applying for funding to be used to support administering Evanston's Inclusionary Housing Ordinance (IHO) and Evanston's centralized waitlist for affordable rental housing. CPAH will be utilizing this grant to provide support for inclusionary projects developed and completed by December 31st, 2019 (up to 15 "new" units and 6 income re-certifications). Specific duties include managing the application process, qualifying prospective buyers, organizing and maintaining the applicant waiting list, marketing inclusionary opportunities to eligible residents, educating potential buyers/renters about program requirements, screening and qualifying buyers/renters, and monitoring recertification of rental units.. This grant includes staff time to assist city staff with questions related to the IHO Policies and Procedures, as well as meeting with developers when necessary and consulting on related matters. CPAH has over 15 years administering IHOs, including its work in Evanston this past 16 months and administering Highland Park's IHO for 15 years. In addition, CPAH consults with the City of Lake Forest on the administration of its ordinance.

CPAH has worked with Evanston city staff and developers to market and lease affordable rental units. Marketing efforts begin several months ahead of the completion of the development. CPAH actively reached out to the community by, for example, holding information sessions at the Evanston Public Library, where residents learn about the program and receive pre-applications, and by circulating information about specific units via the Evanston e-newsletter. During 2018, 150 applicants were added to the centralized waitlist as a result of these and other marketing efforts. In addition to those who follow through to submit pre-applications, CPAH receives many inquiries about housing that we estimate to be approximately 3 times the number of pre-applications received.

When an IHO unit(s) is available, CPAH contacts potentially qualified applicants from the wait list and asks for additional information and supporting income documentation. That information is used to determine if an applicant is qualified. If an applicant is qualified, they are then referred to the developer/landlord for further screening. The developer/landlord ultimately decides whether to offer a lease to a particular applicant. CPAH continues this process, in order of the waiting list, until the available units are leased. As part of the contract, CPAH income re-certifies all IHO tenants annually.

CPAH is committed to ensuring that all who are interested in applying for the program are given the opportunity to do so and are provided services as needed to complete the application process. All applicants are treated equally, and CPAH is pleased that our commitment to fairness has resulted in a very diverse resident population.



PROPOSAL FOR ADMINISTERING EVANSTON'S INCLUSIONARY HOUSING PROGRAM AND CENTRALIZED WAITLIST

CPAH will be joining forces with two other successful housing non-profits as of January 1, 2019. The new organization, which will still be called CPAH, will create the opportunity to engage additional staff as needed in the administration of the IHO. CPAH will continue to be a HUD-certified Community Housing Development Organization (CHDO) in the City of Evanston and Lake County, IL and will remain at the forefront of affordable housing as a leader in Illinois and throughout the country.

Staff:

CPAH's executive director, Kim Ulbrich, who will have a new title as of January 1, 2019 but will continue to work on inclusionary housing, has extensive experience with affordable housing development and the administration of local grant funds for affordable housing and homeless programs, including four years as a Community Development Specialist with the McHenry County Community Development Department. Kim has over 30 years of experience in real estate and construction and served as the Project Manager for the McHenry County NSP program where she supervised development, construction, and marketing of both multi-family and single-family homes. Amy Kaufman, CPAH's Associate Director (who will also have a new title as of January 1, 2019) is a lawyer by training and handles a significant portion of the organization's fundraising, marketing, inquiries from prospective applicants, program information workshops, management of the applications, qualification process and waiting lists, sale process, and ongoing services to and education of renters and buyers. Reema Shakya, Program Associate/Bookkeeper, assists with inquiries and managing the waitlist.

Budget Narrative:

CPAH is submitting its request for \$28,675 to administer Evanston's Inclusionary Housing Ordinance for 2019. The proposal covers the cost of staff time allocated to complete the processes outlined above, which reflect approximately 9% of staff time. Please note that should the IHO units that are scheduled to be completed by the end of 2019 not be completed as planned, this contract could be extended into 2020, just as the previous contract was extended.

Funding would cover:

- Coordinating the program with City staff;
- Implementing policies and procedures of the IHO;
- Fielding inquiries;
- Providing pre-applications and when appropriate, full applications;
- Conducting information sessions and other community outreach;
- Marketing the program generally to make residents aware of opportunities provided by the IHO;
- Conducting income verification and qualification for applicants from the waiting list when a unit is available. This includes collecting supporting income documentation for each applicant contacted about a unit who decides to apply for a specific unit. The information required includes but is not limited to tax returns, W2s, pay stubs, asset statements and employer verification forms.



PROPOSAL FOR ADMINISTERING EVANSTON'S INCLUSIONARY HOUSING PROGRAM AND CENTRALIZED WAITLIST

- Working with applicants to complete the application process.
- Managing the waiting list for rental units including conducting yearly wait list updates;

Overhead including: 9 % of Operating Budget for each category

- Office Expenses
- Utilities
- Travel & Meeting Expenses (Mileage Reimbursement)
- Marketing & Advertising Expense

Thank you for your consideration.

**Community Partners, Inc.
Proposal Budget -Attachment A**

Organization Name:	Community Partners for Affordable Housing
Address:	400 Central Ave. #111
City, State, Zip:	Highland Park, IL 60035
Telephone Number:	847-861-8746
Contact Name:	Kim Ulbrich
Requested Period of Performance:	1/1/2017-12/31/2017

Salaries (List Positions and hourly rates Below):	Percent of Time Billed	Total Grant Budget
Executive Director, Hourly Salary \$44.15	9%	\$9,297.43
Associate Director Salary \$32.50	9%	\$6,843.46
Program Manager, Hourly Salary \$19.95	9%	\$7,002.40
Total Salaries		\$ 23,143.29
Total Fringe Benefits (% of salaries or actual costs)		\$ 2,571.00
In-Direct Costs (List Line Item Details Below)		
Office Expense	9%	1,595.00
Occupancy Expense	9*%	77.00
Travel/Mileage	9%	270.00
Marketing/Advertising	9%	857.00
Office Equipment	9%	162.00
Total InDirect Costs		\$ 2,961.00
Approved Indirect Rate 9%		
REQUESTED BUDGET		
TOTAL BUDGET		\$ 28,675.00

Notes from HHC meeting November 1, 2018

1) Check with Economic Development to get thoughts on possibility of **imposing a fee on non-residential demolition** and check with the legal department re: implication of demolition tax on non-residential properties

2) Continue research on **Definition of Demolition**

Clarification on how it is defined and what it means in practical terms

- can a demolition tax only be imposed on tear downs vs. major rehab vs. conversions
- how can we ensure that we are capturing all of the demolitions
- which City Department is following up to make sure demolition tax is being enforced and homeowners or developers are not avoiding payment because of “misinterpretation” of what a “demolition” is?

Does it have to be “tear down”?

Presumably for affordable housing fund purposes, it has to be consistent with the definition of demolition that triggers the necessity for a “demolition permit”?

3) **Continued Research on which local municipalities** have demolition tax

Aside from Highland Park, Lake Forest, and Evanston, are there other local communities that have a residential affordable housing demolition tax

4) What have been the **legal challenges** to this type of tax

5) **Possible updates to Ordinance** – for continued discussion

- Provision that offer a **rebate for developers** who replaced a single-family house with affordable housing and/or who develop an accessory dwelling to that property that would qualify as affordable housing
- Provision that **requires placement of Affordable Housing**, e.g. if the proposed demolition (or conversion/rehab) activities involve affordable dwelling units, replacement of the affordable dwelling units shall be provided on a one for one basis
 - Q: how would we determine when an “affordable house or unit” is being demolished (conversion/rehab) --- what would be the definition and how would it vary neighborhood to neighborhood
- Provision for **exemptions**:

For example, **Highland Park** ordinance states that the demolition tax can be **waived** under some circumstances:

- When the permit applicant has entered into an agreement with the Housing Commission to provide affordable housing in the new structure;

- When the applicant has owned the property for at least five years prior to the demolition and covenants to own the property for the next five years;
- When the demolition is necessary due to a natural disaster; or if the property owner is low or moderate-income and qualifies for a medical exception.

Similarly, **Lake Forest** has a **waiver** provision:

- The applicant and City enter into an agreement relating to the creation of additional affordable homes through the demolition and rebuilding process.
- The applicant is the record title-holder on the property for at least three years prior to and following the demolition. In this instance, the applicant must pay the tax and notify the City of his/her intent to seek a rebate. After the three-year post-permit period, the applicant may apply for the rebate.
- Demolition becomes necessary because of factors beyond the owner's control

6. Continued discussion and research of how to structure the fee

Square Footage discussion:

What if fee takes into account the new structure that will be built rather than the one that will be demolished, adding additional fee for demolitions that result in a new home that is significantly larger than the original home (example of structure: fee increase as the size difference between the current and proposed home increases)

- potential problem with this approach: everyone would pay the same no matter what neighborhood they lived in so it doesn't take into account the housing costs/home values of different neighborhoods. So, if you take two homes of same in two different areas of Evanston that have same square footage increase in new home --- depending on the area in Evanston, one home value may have significantly increased whereas another had a modest increase in value yet both homeowners pay the same demolition tax.

Property Value Discussion:

Would using property value discourage the redevelopment of structures that would be costlier to rehab than to rebuild

Using a property value measure could be more equitable as it will take into account the different housing prices/values across the city of Evanston vs. square footage method or straight fee method

7. Next HHC meeting – continued discussion on Demolition tax and begin discussion on updating the Affordable Housing Fund purposes and definitions

- Questions to help shape the discussion will be sent via Google Docs

Demolition Fee Increase Research and Considerations

At its meeting on October 4, 2018, the Housing and Homelessness Commission discussed ideas and considerations for raising the City's demolition tax. The Commission also agreed to call the tax a fee.

Before the next HHC meeting on November 1, 2018, Commissioners are asked to provide research and thoughts on the following questions and considerations:

- Should the fee apply to non-residential buildings?
 - Monika: I think this is more appropriate for the Economic Development Commission. Demolition & redevelopment of non-residential buildings are required and completed under different circumstances. Additionally, none of the Commissioners (HHC Commissioners) have the expertise to analyze this aspect of redevelopment.
 - Alderman Revelle: My immediate thought is to say "yes," but Monika has made a good point: the Economic Development Committee should consider this. (What is the experience of other communities that apply demolition fees to non-residential properties?)
 - Ellen: Haven't found any demolition fees that apply to non-residential buildings but there are several California communities that apply linkage fees to non-residential properties, such as LA, see article in *Curbed LA* at <https://la.curbed.com/2017/12/13/16772046/linkage-fees-los-angeles-affordable-housing>
 - Also see Los Angeles City Memo on Affordable Housing Linkage Fee <https://planning.lacity.org/ordinances/docs/ahlf/ImplementationMemo.pdf>
- Should the fee be structured so that certain property values have different fees in order to discourage tearing down affordable housing? The fee could vary depending on the value of the property being torn down and built - the higher the difference in value, the higher the fee?
 - Ellen: This does seem relevant. One of the issues we need to address is the purpose or purposes of the Demolition Tax - is it to preserve existing housing stock or solely as an affordable housing revenue source, or is it to keep developers from building McMansions or all of the above. And if a revenue source only, what can be done to make it a more sustainable and significant funding source. In some communities, a demolition tax was passed because of the drastic impacts of demolition epidemic (Portland and Austin). Questions to consider: In Evanston, is there a relationship between demolition and loss of affordable housing or are we imposing this tax solely as a source of funding for affordable housing? Do teardowns threaten the city's housing stock? As larger homes are getting built, are middle and low-income residents getting pushed out? Are we trying to preserve the historic character of Evanston or promote sustainability through the re-use of period homes and buildings?
 - Here is a summary of what two local municipalities have done:

Lake Forest – residential only. Goal is to offset costs of demolition incurred by city, including loss of affordable housing. \$12,000 per single-family home and \$6,000 per unit for multifamily properties, or no less than \$12,000. Raised approximately \$30k-40k per year (based upon 2014 stats I think). The City of Lake Forest issues an average of eight permits per year, with 12 permits being issued (in 2014). Half of the revenue from the tax is allocated to the City's capital fund to support infrastructure projects, and half is allocated to the Affordable Housing Trust Fund to finance affordable housing initiatives. Full or partial waiver of the fee is considered when:

- The applicant and City enter into an agreement relating to the creation of additional affordable homes through the demolition and rebuilding process.
- The applicant is the record title-holder on the property for at least three years prior to and following the demolition. In this instance, the applicant must pay the tax and notify the City of his/her intent to seek a rebate. After the three-year post-permit period, the applicant may apply for the rebate.
- Demolition becomes necessary because factors beyond the owner's control

Highland Park - Highland – residential only. Goal is to mitigate the loss of affordable housing from demolition and allocating the revenue to the City's Affordable Housing Trust Fund, which is used to help finance various affordable housing initiatives in the city.

Demolition, defined as the removal or destruction of 50 percent or more of the structure, is measured by a removal of any combination of interior and/or exterior elements. The tax is \$10,000 for a single-family home and \$3,000 per unit or \$10,000, whichever is more, for multi-unit buildings.

The demolition tax can be waived under some circumstances:

- When the permit applicant has entered into an agreement with the Housing Commission to provide affordable housing in the new structure;
- When the applicant has owned the property for at least five years prior to the demolition and covenants to own the property for the next five years;
- When the demolition is necessary due to a natural disaster; or if the property owner is low or moderate-income and qualifies for a medical exception.

To date the City has raised more than \$3.3 million for the Affordable Housing Trust Fund through the demolition tax as of 2014 because of number of teardowns

- 2014 (thru June 2014): 18 = \$134,587
- 2013: 22 = \$170,257
- 2012: 16 = \$129,172
- 2011: 7 = \$60,169

- Ellen: Portland, Oregon proposal: In 2016 the Mayor of Portland proposed a \$25,000 tax on developers who tear down livable single-family homes, plus \$25 for every year the house has been standing. He later revised those guidelines to offer a rebate for developers who replaced a single-family house with affordable housing or multiple new homes, in order to promote density and affordability. Ultimately, he did not think he had Council support, so tabled the proposal.
 - Ellen: Although not exactly on point, Newport Beach, California has an ordinance entitled “Replacement of Affordable Housing single family homes or units” which states that if the proposed conversion or demolition activities involve affordable dwelling units, replacement of the affordable dwelling units shall be provided on a one for one basis, unless the Director determines that replacement is not feasible.
 - Larry: To respond to Ellen’s questions, I think the most useful purpose for a demolition fee is to slow the removal of affordable housing from the market. From what I’ve heard and read about the AH issue, preservation of the existing housing stock is really important. I like the use of square footage, mentioned below, as a way to accomplish that
- Should the fee look at square footage? Would square footage be used instead of property value? The City does not currently track square footage of buildings, so that may pose a challenge.
 - Monika: I think square footage should be used rather than property value. Using property value would likely discourage the redevelopment of structures that are more costly to rehab than to rebuild.
 - Alderman Revelle: I suggest that the fee take into account the new structure that will be built rather than the one that will be demolished. Let’s consider a variation on the Marin County approach: A basic demolition fee (an increase in the current \$10,000) plus an additional fee for demolitions that result in a new home that is significantly larger than the original home (e.g., 500 sq’ or more larger? 1,000 sq’ or more larger?).
 - Ellen: I like Eleanor’s idea - wondering how that would square with the concern that linkage fees are not allowed.
 - Larry: I also like Eleanor’s idea. Could the additional fee for significantly larger homes be set to increase as the size difference between the current and proposed homes increases? McMansions replacing modest homes would have a higher demolition fee. Rehabs of modest homes would have a lower demolition fee.
- Should the fee take into account the neighborhood or location of structure? For example, should the fee be higher if the property is located adjacent to a school or church? Should the impact of the construction on the surrounding area be taken into account? Would taxing the impact of the construction be considered an “impact fee”? Other municipalities have impact fees, but City Council has also learned that Illinois has very strict laws on implementing impact fees.

- Monika: Varying the fee by neighborhood worries me. Are we going to charge higher in high wealth areas? This will come across as an extra tax on the rich. Alternatively, if we charge a higher fee in middle-income and low-income areas, we are making it harder to redevelop the areas that are more likely to have a redevelopment need. Taking the local amenities into account is a more viable strategy, but a specific recommendation should be made for the Commission to consider. My immediate concern is what if the demolition is structured as to not have an impact on schools (because the demolition is completed during summer break) or churches (because the demolition is completed on a weekday) - in these instances, why should we charge additional fees?
- Alderman Revelle: I share Monika's reluctance to vary the fee depending on the neighborhood. I think it would be hard to predict the different situations where this would be applicable and the possible unintended consequences.
- Ellen: I agree. This seems to be more of an issue of costs incurred by the city because of construction projects and, I am guessing that there are other ways for the city to re-coup those costs.
- Staff will provide information on the last five to ten demolitions, including information on the the structure torn down, and the new structure that went in place (if possible).
- Other: The demolition fee should increase on a regular schedule. (Alderman Revelle)

EVANSTON

FEE AND PAYMENT BY CAP

File Date: 1/1/2018 to 10/24/2018

CAP Type: Building / Demolition / Building / NA

CAP Number	File Date	CAP Type	Site Address	Assessed Fees	Invoiced Fees	Payments	Balance Due	Not Applied
18DEMO-0003	01/12/2018	Building/Demolition/Building/NA	1413 FLORENCE AVE <i>G</i>	\$200.00	\$200.00	\$200.00	\$0.00	\$0.00
18DEMO-0006	01/23/2018	Building/Demolition/Building/NA	811 EMERSON ST <i>C</i>	\$21,050.00	\$21,050.00	\$21,050.00	\$0.00	\$0.00
18DEMO-0009	02/08/2018	Building/Demolition/Building/NA	1008 FLORENCE AVE <i>G</i>	\$130.00	\$130.00	\$130.00	\$0.00	\$0.00
18DEMO-0015	03/06/2018	Building/Demolition/Building/NA	3315 DARTMOUTH PL <i>R</i>	\$11,150.00	\$11,150.00	\$11,150.00	\$0.00	\$0.00
18DEMO-0016	03/07/2018	Building/Demolition/Building/NA	2521 THAYER ST <i>G</i>	\$80.00	\$80.00	\$80.00	\$0.00	\$0.00
18DEMO-0018	03/15/2018	Building/Demolition/Building/NA	1022 BRUMMEL ST <i>G</i>	\$80.00	\$80.00	\$80.00	\$0.00	\$0.00
18DEMO-0022	04/04/2018	Building/Demolition/Building/NA	1623 SOUTH BLVD <i>G</i>	\$90.00	\$90.00	\$90.00	\$0.00	\$0.00
18DEMO-0024	04/10/2018	Building/Demolition/Building/NA	2500 JACKSON AVE <i>G</i>	\$110.00	\$110.00	\$110.00	\$0.00	\$0.00
18DEMO-0029	05/03/2018	Building/Demolition/Building/NA	1325 ROSALIE ST <i>G</i>	\$100.00	\$100.00	\$100.00	\$0.00	\$0.00
18DEMO-0030	05/08/2018	Building/Demolition/Building/NA	1305 PITNER AVE <i>R</i>	\$2,745.00	\$2,745.00	\$2,745.00	\$0.00	\$0.00
18DEMO-0031	05/09/2018	Building/Demolition/Building/NA	1520 DEMPSTER ST <i>G</i>	\$90.00	\$90.00	\$90.00	\$0.00	\$0.00
18DEMO-0032	05/09/2018	Building/Demolition/Building/NA	2530 CENTRAL PARK AVE <i>G</i>	\$90.00	\$90.00	\$90.00	\$0.00	\$0.00
18DEMO-0034	05/11/2018	Building/Demolition/Building/NA	1740 BROWN AVE <i>G</i>	\$110.00	\$110.00	\$0.00	\$110.00	\$0.00
18DEMO-0035	05/11/2018	Building/Demolition/Building/NA	721 CASE ST <i>G</i>	\$88.00	\$88.00	\$88.00	\$0.00	\$0.00
18DEMO-0039	05/23/2018	Building/Demolition/Building/NA	1136 FLORENCE AVE <i>R</i>	\$10,000.00	\$10,000.00	\$10,000.00	\$0.00	\$0.00
18DEMO-0040	05/24/2018	Building/Demolition/Building/NA	555 MICHIGAN AVE <i>R</i>	\$11,150.00	\$11,150.00	\$11,150.00	\$0.00	\$0.00
18DEMO-0041	05/24/2018	Building/Demolition/Building/NA	2525 CHURCH ST <i>C</i>	\$11,950.00	\$11,950.00	\$11,950.00	\$0.00	\$0.00
18DEMO-0042	05/25/2018	Building/Demolition/Building/NA	818 COLFAX ST <i>G</i>	\$90.00	\$90.00	\$90.00	\$0.00	\$0.00
18DEMO-0046	06/11/2018	Building/Demolition/Building/NA	611 RIDGE AVE <i>G</i>	\$90.00	\$90.00	\$90.00	\$0.00	\$0.00
18DEMO-0048	06/15/2018	Building/Demolition/Building/NA	2108 BRUMMEL ST <i>G</i>	\$100.00	\$100.00	\$100.00	\$0.00	\$0.00
18DEMO-0049	06/15/2018	Building/Demolition/Building/NA	2731 SIMPSON ST <i>G</i>	\$90.00	\$90.00	\$90.00	\$0.00	\$0.00
18DEMO-0051	06/19/2018	Building/Demolition/Building/NA	1727 LEE ST <i>G</i>	\$80.00	\$80.00	\$80.00	\$0.00	\$0.00

*half
removed
now
replaced
if for double
moving*

*permit
re
removed
DE
moving
structure*

*G = Garage
R = Residential
C = Commercial*

EVANSTON

FEE AND PAYMENT BY CAP

File Date: 1/1/2018 to 10/24/2018

CAP Type: Building / Demolition / Building / NA

CAP Number	File Date	CAP Type	Site Address	Assessed Fees	Invoiced Fees	Payments	Balance Due	Not Applied
18DEMO-0053	06/21/2018	Building/Demolition/Building/NA	2640 LINCOLNWOOD DR G	\$140.00	\$140.00	\$140.00	\$0.00	\$0.00
18DEMO-0054	06/21/2018	Building/Demolition/Building/NA	830 RIDGE TER G	\$80.00	\$80.00	\$80.00	\$0.00	\$0.00
18DEMO-0055	06/27/2018	Building/Demolition/Building/NA	2412 LAWDALE AVE G	\$110.00	\$110.00	\$110.00	\$0.00	\$0.00
18DEMO-0056	06/27/2018	Building/Demolition/Building/NA	2221 FORESTVIEW RD G	\$135.00	\$135.00	\$135.00	\$0.00	\$0.00
18DEMO-0057	07/03/2018	Building/Demolition/Building/NA	2441 PROSPECT AVE G	\$100.00	\$100.00	\$100.00	\$0.00	\$0.00
18DEMO-0058	07/05/2018	Building/Demolition/Building/NA	2503 EASTWOOD AVE R	\$5,950.00	\$5,950.00	\$5,950.00	\$0.00	\$0.00
18DEMO-0059	07/06/2018	Building/Demolition/Building/NA	1940 WESLEY AVE G	\$160.00	\$160.00	\$160.00	\$0.00	\$0.00
18DEMO-0060	07/11/2018	Building/Demolition/Building/NA	3320 HAYES ST G	\$90.00	\$90.00	\$90.00	\$0.00	\$0.00
18DEMO-0061	07/11/2018	Building/Demolition/Building/NA	2125 OAKTON ST G	\$110.00	\$110.00	\$110.00	\$0.00	\$0.00
18DEMO-0067	07/27/2018	Building/Demolition/Building/NA	2737 ASBURY AVE G	\$80.00	\$80.00	\$80.00	\$0.00	\$0.00
18DEMO-0070	08/01/2018	Building/Demolition/Building/NA	1450 SHERMAN AVE C	\$3,600.00	\$3,600.00	\$3,600.00	\$0.00	\$0.00
18DEMO-0071	08/01/2018	Building/Demolition/Building/NA	1508 SHERMAN AVE C	\$3,500.00	\$3,500.00	\$3,500.00	\$0.00	\$0.00
18DEMO-0072	08/01/2018	Building/Demolition/Building/NA	1502 SHERMAN AVE C	\$3,100.00	\$3,100.00	\$3,100.00	\$0.00	\$0.00
18DEMO-0073	08/01/2018	Building/Demolition/Building/NA	1506 SHERMAN AVE C	\$2,450.00	\$2,450.00	\$2,450.00	\$0.00	\$0.00
18DEMO-0075	08/08/2018	Building/Demolition/Building/NA	2000 GREEN BAY RD C	\$850.00	\$850.00	\$850.00	\$0.00	\$0.00
18DEMO-0076	08/10/2018	Building/Demolition/Building/NA	312 ASBURY AVE G	\$100.00	\$100.00	\$100.00	\$0.00	\$0.00
18DEMO-0078	08/10/2018	Building/Demolition/Building/NA	3121 HARTZELL ST G	\$100.00	\$0.00	\$0.00	\$0.00	\$0.00
18DEMO-0079	08/10/2018	Building/Demolition/Building/NA	1040 ELMWOOD AVE G	\$80.00	\$80.00	\$80.00	\$0.00	\$0.00
18DEMO-0081	08/16/2018	Building/Demolition/Building/NA	1801 GREY AVE G	\$90.00	\$90.00	\$90.00	\$0.00	\$0.00
18DEMO-0082	08/16/2018	Building/Demolition/Building/NA	1200 JUDSON AVE G	\$120.00	\$120.00	\$120.00	\$0.00	\$0.00
18DEMO-0083	08/23/2018	Building/Demolition/Building/NA	2728 GRANT ST G	\$150.00	\$150.00	\$150.00	\$0.00	\$0.00
18DEMO-0085	08/28/2018	Building/Demolition/Building/NA	1512 CRAIN ST G	\$100.00	\$100.00	\$100.00	\$0.00	\$0.00
18DEMO-0088	09/06/2018	Building/Demolition/Building/NA	1726 BRUMMEL ST G	\$80.00	\$80.00	\$80.00	\$0.00	\$0.00

for reduced fee by - FD St. A's

Albion

EVANSTON

FEE AND PAYMENT BY CAP

File Date: 1/1/2018 to 10/24/2018

CAP Type: Building / Demolition / Building / NA

CAP Number	File Date	CAP Type	Site Address	Assessed Fees	Invoiced Fees	Payments	Balance Due	Not Applied
18DEMO-0089	09/06/2018	Building/Demolition/Building/NA	1829 LEMAR AVE R	\$11,050.00	\$11,050.00	\$11,050.00	\$0.00	\$0.00
18DEMO-0090	09/11/2018	Building/Demolition/Building/NA	2022 LAKE ST G	\$100.00	\$100.00	\$100.00	\$0.00	\$0.00
18DEMO-0095	09/27/2018	Building/Demolition/Building/NA	710 MADISON ST G	\$130.00	\$130.00	\$130.00	\$0.00	\$0.00
18DEMO-0097	10/19/2018	Building/Demolition/Building/NA	2414 HARTZELL ST G	\$70.00	\$70.00	\$70.00	\$0.00	\$0.00
18DEMO-0099	10/23/2018	Building/Demolition/Building/NA	2102 DARROW AVE G	\$90.00	\$90.00	\$90.00	\$0.00	\$0.00
TOTALS:					\$102,378.00	\$102,168.00	\$110.00	\$0.00
				Number of CAP's: 50				

At its meeting on November 1st, 2018, the Housing and Homelessness Commission agreed to begin making suggested revisions to the City's Affordable Housing Fund description. Staff said the goal is to remove "demolition tax" from the title, and instead add it as a source of revenue for the Fund. Ideally, the City would have more than one revenue source for the Fund at some point in the future. The revised description should also align with the City's revised Inclusionary Housing Ordinance.

Commissioners can provide ideas and suggestions for revisions in the document below:

CHAPTER 18 - AFFORDABLE HOUSING DEMOLITION TAX AND AFFORDABLE HOUSING FUND

SECTION:

4-18-1. - PURPOSE.

The purpose of this Chapter is to provide a source of funding for the creation, maintenance, and improvement of safe and decent affordable housing in the City of Evanston in order to enhance preservation and maintenance of the City's cultural and economic diversity.

(Ord. No. 139-0-05; Ord. No. 8-0-12, (48-0-11(exh. A, § 4-18-1)), 1-23-2012)

4-18-2. - DEFINITIONS.

For the purposes of administering this Chapter:

<p>AFFORDABLE HOUSING FUND.</p>	<p>The fund established by City Council which can only receive and expend monies dedicated to the creation, preservation, maintenance, and improvement of affordable housing for households whose income is one hundred percent (100%) or less of area median income, with no less than sixty percent (60%) of all monies reserved for households that earn less than eighty percent (80%) of area median income. The City Manager or his/her designee may implement programs including, but not limited to: down payment and/or rental assistance; building rehabilitation and/or construction loans; property acquisition and disposition; and grants to nonprofit organizations that serve households that earn less than one hundred percent (100%) of area median income. Said programs shall be administered in accord with guidelines generated by the Evanston Housing and Homelessness Commission, reviewed by the Planning and Development Committee and/or Human Services Committee of the City Council, and approved by the City Council.</p>
<p>AFFORDABLE HOUSING, OWNER OCCUPIED.</p>	<p>Decent, safe, sanitary housing that is affordable to "relevant households" as defined herein. The cost of the mortgage payment and relevant expenses (a calculation of property taxes, homeowner's insurance, and, when applicable, condominium or homeowner association fees) of owner occupied dwelling units shall not exceed thirty three percent (33%) of the relevant household's gross annual household income (the total income of all adults over eighteen (18) years of age in the household).</p>
<p>AFFORDABLE HOUSING, RENTAL.</p>	<p>Decent, safe, sanitary housing that is affordable to "relevant households" as defined herein. The cost (including a utility allotment and adjustment for household size) of rental dwelling units shall not exceed thirty percent (30%) of the relevant household's gross annual household income (the total income of all</p>

	adults over eighteen (18) years of age in said household).
APPLICANT.	Any individual who applies for a building demolition permit under this code.
AREA MEDIAN INCOME.	The median income level for the Chicago primary metropolitan statistical area, as established and defined in the annual schedule published by the secretary of the United States department of housing and urban development and adjusted for household size.
DEMOLITION.	The removal or destruction of a structure or building in whole or in part to the extent of fifty percent (50%) or more of such structure or building as it existed prior to the commencement of such act or process.
DEMOLITION STRUCTURE.	The building or structure to be demolished.
DIRECTOR.	The director of the Evanston Community and Economic Development Department.
DWELLING UNIT.	A room or group of contiguous rooms that include facilities used or intended to be used for living, sleeping, cooking and eating, and that are arranged, designed, or intended for use exclusively as living quarters.
RELEVANT HOUSEHOLD.	A low or moderate income household whose total income does not exceed the relevant percent of median income for the Chicago primary metropolitan statistical area Chicago area, as established and defined in the annual schedule published by the secretary of housing and urban development, and adjusted for household size. A low income household has income that does not exceed eighty percent (80%) of HUD area median income. A moderate income household has income that does not exceed one hundred percent (100%) of the HUD area median income.
REPLACEMENT STRUCTURE.	Any building or structure replacing the demolition structure.
RESIDENTIAL STRUCTURE.	Any building or structure containing dwelling units.
RESIDENTIAL STRUCTURE,	A detached residential building containing three (3) or more dwelling units, including what is commonly known as an apartment building, but not including

MULTI-FAMILY.	group, row, or townhouses, excluding a hotel, motel, boarding house, rooming house, dormitory, nursing home, mobile home, institution, or retirement home or community.
RESIDENTIAL STRUCTURE, SINGLE-FAMILY ATTACHED (Group, Row, Or Townhouses).	Three (3) or more dwelling units joined side by side.
RESIDENTIAL STRUCTURE, SINGLE-FAMILY ATTACHED, TWO-FAMILY.	A residential building containing not more than two (2) dwelling units entirely surrounded by open space on the same lot.
RESIDENTIAL STRUCTURE, SINGLE-FAMILY DETACHED.	A residential building containing not more than one dwelling unit entirely surrounded by open space on the same lot.

(Ord. No. 40-0-07; Ord. No. 8-0-12, (48-0-11(exh. A, § 4-18-1)), 1-23-2012; Ord. No. 61-O-12, § 2, 10-8-2012)

4-18-3. - TAX IMPOSED.

(A) Amount Of Tax. Any person granted a permit under this code for demolition of a residential structure shall pay an affordable housing demolition tax of: 1) ten thousand dollars (\$10,000.00) for the demolition of any single-family detached residential structure, or 2) for the demolition of any multi-family, single-family attached, or two-family residential structure, either ten thousand dollars (\$10,000.00) or three thousand dollars (\$3,000.00) for each unit in the structure, whichever amount is more. The tax imposed pursuant to this Subsection shall be in addition to the demolition permit fee established from time to time by the City Council and all other applicable fees and charges. Payment of the tax, unless deferred as provided in Section 4 of this Chapter, shall be due upon issuance of a demolition permit by the department, and is a condition to the validity of the permit. The City shall have a lien against the property which was the subject of the demolition permit until applicable tax obligations imposed by this Chapter are satisfied. The funds received by the City for the amount imposed pursuant to this Subsection shall be dedicated to achievement of the affordable housing goals and objectives as set forth in Section 1 of this Chapter. The demolition tax funds received pursuant to the tax imposed by this Chapter shall be deposited directly into the affordable housing fund.

(Ord. No. 40-0-07)

- (B) Specific Applicability Rules. Notwithstanding the general requirement set forth in Subsection (A) of this Section, the tax shall not apply under the following circumstances. This Subsection, however, shall not affect an applicant's obligation to pay the demolition permit fee.
1. If the applicant and the City enter into an agreement for the provision of "affordable housing" as defined in Section 2 of this Chapter in conjunction with the demolition that would otherwise be the subject of Subsection (A) of this Section. Any such agreement shall require prior City Council approval and shall specifically set forth the applicability of this Subsection.
 2. If the Director determines, pursuant to regulations enacted by the City Council, that the building or structure replacing the building or structure that is the subject of the demolition permit constitutes "affordable housing" as defined in Section 2 of this Chapter.
 3. If the director or any other city department head, or their respective designees, orders a demolition for any reason, including, but not limited to, nuisance, public safety, or fire hazard, this tax shall not apply, regardless of whether the demolition work is performed by a public or private entity.
- (C) General Applicability: Imposition of the tax provided for by subsection (A) of this section shall not apply to any demolition for which a perfected application for the demolition permit was on file with the city on or before the effective date hereof.

(Ord. No. 139-0-05)

(Ord. No. 139-0-05; Ord. No. 40-0-07; Ord. No. 8-0-12, (48-0-11(exh. A, § 4-18-3)), 1-23-2012)

4-18-4. - TAX DEFERRAL OPTION.

- (A) A person who has been the record title holder or beneficiary of a land trust (collectively, "record title holder") and occupant of a residential structure for three (3) consecutive years, and who files or causes to be filed an application for a demolition permit for that structure, may opt for deferral of the tax, as provided in this Subsection 4-18-4(A) or (B). In the event the demolition permit is for a multi-unit structure, the person may only defer that portion of the demolition tax attributable to his/her own dwelling unit. The demolition permit fee must be paid at the time of application. The person shall make application for deferral of the tax to the Director on a form provided for that purpose and available from the Building Permit Desk. To qualify for the deferral, the person shall provide documentation to establish that all real estate taxes on the subject property have been paid in full as of the date of application for the permit; that any and all City liens and judgments recorded on the subject property have been satisfied; and that the person has been the record title holder and occupant of the subject structure for three (3) consecutive years prior to the date of application for the permit. Documentation the Director may require to establish the person's qualification for the tax deferral option may include, but shall not be limited to, income tax records and proof of voter registration. If the Director determines that the person qualifies for the deferral option, he/she shall cause a lien to be recorded against the property with the Cook County Recorder in the amount of the tax to be deferred, to which shall be added the applicable recordation fee. Except as provided in Section 4-18-4(C), the lien shall not bear interest. The Director may, upon written request of the person, subordinate the lien to any mortgage the person may have or seek on the property. Among the factors the Director may consider in determining whether or not to grant the subordination request is whether the value of the property is adequate to ensure payment of the City's lien, and that all real estate taxes have been paid.
- (B) Deferral of the Tax in the case of Recycling/Reuse of Materials. Any applicant who applies for a demolition permit and seeks to defer the demolition tax by reason that the materials generated by the demolition of a structure will be recycled and/or reused, may apply for a deferral of the tax. Evidence of such recycling/reuse shall be furnished to the Director in writing, and the Director shall determine if the applicant qualifies for this deferral option. All requirements for the application for the deferral and the release of lien as provided for in this Section 4-18-4 of this chapter shall apply.

- (C) Deferral of the Tax in the case that the subject property is no longer a buildable parcel. Any applicant who applies for a demolition permit and seeks to defer the demolition tax by reason that the lot/parcel in question is no longer buildable under the City's ordinance may apply for a deferral of the tax. Evidence of such change in property characteristics must be furnished to the Director in writing and the Director shall determine if the applicant qualifies for this deferral option. All requirements for the application for the deferral and the release of lien as provided for in this Section 4-18-4 of this chapter shall apply.
- (D) Release of lien.
- (1) A person who exercised the tax deferral option provided for in Section 4-18-4(A), (B), or (C) and who has been the record title holder and occupant for three (3) consecutive years after issuance of a Final Certificate of Occupancy for the replacement structure may apply for release of the lien by making application therefor to the Director on a form provided for that purpose and available from the Building Permit Desk. Documentation the Director may require to establish the person's qualification for the release of lien may include, but shall not be limited to, income tax records and proof of voter registration for the years in question. If the Director determines that the person qualifies for the release, he/she shall provide the person with a recordable release of lien no later than thirty (30) days after he/she determines that the person qualifies for the release.
 - (2) A person who exercised the tax deferral option provided for in Section 4-18-4(A), (B) or (C) who sells the subject property prior to the expiration of the three (3)-consecutive-year period after issuance of the Final Certificate of Occupancy shall, as a condition to the City's release of the lien, pay the tax due, to which shall be added interest at the annualized Money Market Index rate published by the Government Finance Officers Association.

(Ord. No. 139-0-05; Ord. No. 40-0-07; Ord. No. 62-0-11, § 2, 8-8-2011; Ord. No. 8-0-12, (48-0-11(exh. A, § 4-18-4)), 1-23-2012)

4-18-5. - STABILITY INCENTIVE.

When the tax was paid at the time of permit issuance as provided for in subsection 3(A) of this chapter, a person who has been the record title owner and occupant of a residential property demolished subsequent to the effective date of this chapter ("preexisting structure") for all of the three (3) years immediately preceding the date of the application for demolition ("prepermit period"), and remains the record titleholder and occupant of the property for three (3) consecutive years beginning immediately after the date on which the certificate of occupancy for the new residential structure is issued, may qualify for a monetary stability incentive in an amount equal to the demolition tax paid on the issuance of the permit for demolition of the preexisting structure, provided, however, that only persons whose real estate taxes on the property are paid in full at the time of application for stability incentive may apply for the incentive.

Application for the stability incentive payment shall be made to the director on a form provided for that purpose and available from the building permit desk. The person must provide the director of Community and Economic Development with such documentation as he/she may require to establish that the owner qualifies for the payment under the requirements of this section. Such documentation may include, but is not limited to, income tax returns and proof of voter registration for the years in question. The city shall pay qualifying persons an amount equal to the demolition tax, if any, imposed pursuant to this chapter on the issuance of the permit for the preexisting structure, less the amount of any liens recorded by the city against the subject property, including, but not limited to, liens for judgments entered in cases adjudicated in the city's Division Of Administrative Adjudication, no later than thirty (30) days after the Director of Community and Economic Development determines that an owner qualifies for the stability incentive.

(Ord. No. 139-0-05; Ord. No. 40-0-07; Ord. No. 8-0-12, (48-0-11(exh. A, § 4-18-5)), 1-23-2012)

4-18-6. - SEVERABILITY.

The provisions, sections, and subsections of this chapter shall be deemed separable, and the invalidity of any portion of this chapter shall not affect the validity of the remainder.

(Ord. No. 139-0-05; Ord. No. 40-0-07; Ord. No. 8-0-12, (48-0-11(exh. A, § 4-18-6)), 1-23-2012)

CHAPTER 18 - AFFORDABLE HOUSING ~~DEMOLITION TAX AND AFFORDABLE HOUSING~~-FUND

SECTION:

4-18-1. - PURPOSE.

The purpose of ~~this Chapter~~ the Affordable Housing Fund is to provide funding for the planning, expansion, maintenance, conservation, and rehabilitation of Evanston's housing stock and to be responsive to needs for change in housing-related matters to the end of maintaining a diverse residential environment and to conserve property values within the community and to combat homelessness. ~~provide a source of funding for the creation, maintenance, and improvement of safe and decent affordable housing in the City of Evanston in order to enhance preservation and maintenance of the City's cultural and economic diversity.~~

(Ord. No. 139-0-05; Ord. No. 8-0-12, (48-0-11(exh. A, § 4-18-1)), 1-23-2012)

4-18-2. - DEFINITIONS.

For the purposes of administering this Chapter:

AFFORDABLE HOUSING FUND.	<p>The fund established by City Council which can only receive and expend monies dedicated to the creation, preservation, maintenance, and improvement of affordable housing for households whose income is one hundred <u>twenty</u> percent (100<u>120</u>%) or less of area median income, <u>Priority uses with no less than sixty percent (60%) of all monies reserved for households that earn less than eighty percent (80%) of area median income will be based on the City's Consolidated Plan that identifies housing needs and strategies to address them and is approved by City Council.</u> The City Manager or his/her designee may implement programs<u>activities</u> including, but not limited to:</p> <p><u>Housing development projects funded by loans or grants including, but not limited to, acquisition, pre-development costs; construction of new housing units; rehabilitation of existing units; adaptive re-use of non-residential buildings for housing; construction or renovation of shelters and/or transitional housing.</u></p> <p><u>Housing programs and services funded by grants that are implemented by nonprofits or City staff that serve households whose incomes do not exceed 120% of the area median income including, but not limited to: grants or loans to homebuyers in the form of down payment and/or closing cost assistance; homebuyer/credit counseling; home maintenance and management for new homeowners; rental assistance; landlord-tenant services; landlord training and education; building rehabilitation and/or construction loans; property acquisition and disposition; homesharing programs; and case management and other needed services to enable households to access housing or shelter and/or</u></p>
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	<p><u>maintain their housing and grants to nonprofit organizations that serve households that earn less than one hundred percent (100%) of area median income.</u></p> <p><u>Funds may also be used to fund staffing and other costs required to administer and manage funded activities, monitor compliance with affordable housing requirements, and assess and report outcomes and effectiveness at meeting City housing related goals.</u></p> <p>Said <u>projects and</u> programs shall be administered in accord with guidelines generated by the Evanston Housing and Homelessness Commission, reviewed by the Planning and Development Committee and/or Human Services Committee of the City Council, and approved by the City Council.</p>
AFFORDABLE HOUSING, OWNER OCCUPIED.	Decent, safe, sanitary housing that is affordable to "relevant households" as defined herein. The cost of the mortgage <u>payment principal and interest</u> and relevant expenses (a calculation of property taxes, homeowner's insurance, <u>private mortgage insurance</u> and, when applicable, condominium or homeowner association fees) of owner occupied dwelling units shall not exceed thirty <u>three one</u> percent (<u>3331</u> %) of the relevant household's gross annual household income (the total income of all adults over eighteen (18) years of age in the household).
AFFORDABLE HOUSING, RENTAL.	Decent, safe, sanitary housing that is affordable to "relevant households" as defined herein. The cost (including a utility allotment and adjustment for household size) of rental dwelling units shall not exceed thirty percent (30%) of the relevant household's gross annual household income (the total income of all adults over eighteen (18) years of age in said household).
<u>APPLICANT.</u>	<u>Any individual who applies for a building demolition permit under this code.</u>
AREA MEDIAN INCOME.	The median income level for the Chicago primary metropolitan statistical area, as established and defined in the annual schedule published by the secretary of the United States department of housing and urban development and adjusted for household size.
<u>DEMOLITION.</u>	<u>The removal or destruction of a structure or building in whole or in part to the extent of fifty percent (50%) or more of such structure or building as it existed prior to the commencement of such act or process.</u>
<u>DEMOLITION</u>	<u>The building or structure to be demolished.</u>

Comment [FS1]: Move to Demolition Tax section

Comment [FS2]: Move to Demolition tax section

Comment [FS3]: Move to demolition tax section

STRUCTURE.	
DIRECTOR.	The director of the Evanston Community and Economic Development Department <u>or his/her designee, or of any successor agency, unless otherwise indicated.</u>
DWELLING UNIT.	A room or group of contiguous rooms that include facilities used or intended to be used for living, sleeping, cooking and eating, and that are arranged, designed, or intended for use <u>exclusively as living quarters.</u>
RELEVANT HOUSEHOLD.	A low or , moderate, <u>or middle</u> income household whose total income does not exceed the relevant percent of median income for the Chicago primary metropolitan statistical area Chicago area, as established and defined in the annual schedule published by the secretary of housing and urban development, and adjusted for household size. A low income household has income that does not exceed <u>eighty-fifty percent (8050%)</u> of HUD area median income; a moderate income household has income that does not exceed <u>eighty percent (80%) of HUD area median income, and a middle income household has income that does not exceed</u> one hundred <u>twenty</u> percent (100120 %) of the HUD area median income.
REPLACEMENT STRUCTURE.	Any building or <u>structure</u> replacing the demolition structure.
RESIDENTIAL STRUCTURE.	Any building or structure containing dwelling units.
RESIDENTIAL STRUCTURE, MULTI-FAMILY.	A detached residential building containing three (3) or more dwelling units, including what is commonly known as an apartment building, but not including group, row, or townhouses, excluding a hotel, motel, boarding house, rooming house, dormitory, nursing home, mobile home, , or institution, or retirement home or community.
RESIDENTIAL STRUCTURE, SINGLE-FAMILY ATTACHED (Group, Row, Or Townhouses).	Three (3) or more dwelling units joined side by side.
RESIDENTIAL	A residential building containing not more than two (2) dwelling units entirely

Comment [FS4]: Separate definitions for Community Development Department and Director?

Comment [FS5]: Expand to include live-work spaces?

Comment [FS6]: Move to demolition tax section

STRUCTURE, SINGLE-FAMILY ATTACHED, TWO- FAMILY.	surrounded by open space on the same lot.
RESIDENTIAL STRUCTURE, SINGLE-FAMILY DETACHED.	A residential building containing not more than one dwelling unit entirely surrounded by open space on the same lot.

(Ord. No. 40-0-07; Ord. No. 8-0-12, (48-0-11(exh. A, § 4-18-1)), 1-23-2012; Ord. No. 61-O-12, § 2, 10-8-2012)

SOURCES OF FUNDING FOR THE AFFORDABLE HOUSING FUND

DEMOLITION TAX (or Fee?)

4-18-3. - ~~TAX IMPOSED.~~

Comment [FS7]: Check with Legal about use of fee instead of tax

(A) Amount Of Tax. Any person granted a permit under this code for demolition of a residential structure shall pay an affordable housing demolition tax of: 1) ten thousand dollars (\$10,000.00) for the demolition of any single-family detached residential structure, or 2) for the demolition of any multi-family, single-family attached, or two-family residential structure, either ten thousand dollars (\$10,000.00) or three thousand dollars (\$3,000.00) for each unit in the structure, whichever amount is more. The tax imposed pursuant to this Subsection shall be in addition to the demolition permit fee established from time to time by the City Council and all other applicable fees and charges. Payment of the tax, unless deferred as provided in Section 4 of this Chapter, shall be due upon issuance of a demolition permit by the department, and is a condition to the validity of the permit. The City shall have a lien against the property which was the subject of the demolition permit until applicable tax obligations imposed by this Chapter are satisfied. The funds received by the City for the amount imposed pursuant to this Subsection shall be dedicated to achievement of the affordable housing goals and objectives as set forth in Section 1 of this Chapter. The demolition tax funds received pursuant to the tax imposed by this Chapter shall be deposited directly into the affordable housing fund.

(Ord. No. 40-0-07)

(B) Specific Applicability Rules. Notwithstanding the general requirement set forth in Subsection (A) of this Section, the tax shall not apply under the following circumstances. This Subsection, however, shall not affect an applicant's obligation to pay the demolition permit fee.

1. If the applicant and the City enter into an agreement for the provision of "affordable housing" as defined in Section 2 of this Chapter in conjunction with the demolition that would otherwise be the subject of Subsection (A) of this Section. Any such agreement shall require prior City Council approval and shall specifically set forth the applicability of this Subsection.

2. If the Director determines, pursuant to regulations enacted by the City Council, that the building or structure replacing the building or structure that is the subject of the demolition permit constitutes "affordable housing" as defined in Section 2 of this Chapter.
 3. If the director or any other city department head, or their respective designees, orders a demolition for any reason, including, but not limited to, nuisance, public safety, or fire hazard, this tax shall not apply, regardless of whether the demolition work is performed by a public or private entity.
- (C) General Applicability: Imposition of the tax provided for by subsection (A) of this section shall not apply to any demolition for which a perfected application for the demolition permit was on file with the city on or before the effective date hereof.

(Ord. No. 139-0-05)

(Ord. No. 139-0-05; Ord. No. 40-0-07; Ord. No. 8-0-12, (48-0-11(exh. A, § 4-18-3)), 1-23-2012)

4-18-4. - TAX DEFERRAL OPTION.

- (A) A person who has been the record title holder or beneficiary of a land trust (collectively, "record title holder") and occupant of a residential structure for three (3) consecutive years, and who files or causes to be filed an application for a demolition permit for that structure, may opt for deferral of the tax, as provided in this Subsection 4-18-4(A) or (B). In the event the demolition permit is for a multi-unit structure, the person may only defer that portion of the demolition tax attributable to his/her own dwelling unit. The demolition permit fee must be paid at the time of application. The person shall make application for deferral of the tax to the Director on a form provided for that purpose and available from the Building Permit Desk. To qualify for the deferral, the person shall provide documentation to establish that all real estate taxes on the subject property have been paid in full as of the date of application for the permit; that any and all City liens and judgments recorded on the subject property have been satisfied; and that the person has been the record title holder and occupant of the subject structure for three (3) consecutive years prior to the date of application for the permit. Documentation the Director may require to establish the person's qualification for the tax deferral option may include, but shall not be limited to, income tax records and proof of voter registration. If the Director determines that the person qualifies for the deferral option, he/she shall cause a lien to be recorded against the property with the Cook County Recorder in the amount of the tax to be deferred, to which shall be added the applicable recordation fee. Except as provided in Section 4-18-4(C), the lien shall not bear interest. The Director may, upon written request of the person, subordinate the lien to any mortgage the person may have or seek on the property. Among the factors the Director may consider in determining whether or not to grant the subordination request is whether the value of the property is adequate to ensure payment of the City's lien, and that all real estate taxes have been paid.
- (B) **Deferral of the Tax in the case of Recycling/Reuse of Materials.** Any applicant who applies for a demolition permit and seeks to defer the demolition tax by reason that the materials generated by the demolition of a structure will be recycled and/or reused, may apply for a deferral of the tax. Evidence of such recycling/reuse shall be furnished to the Director in writing, and the Director shall determine if the applicant qualifies for this deferral option. All requirements for the application for the deferral and the release of lien as provided for in this Section 4-18-4 of this chapter shall apply.
- (C) Deferral of the Tax in the case that the subject property is no longer a buildable parcel. Any applicant who applies for a demolition permit and seeks to defer the demolition tax by reason that the lot/parcel in question is no longer buildable under the City's ordinance may apply for a deferral of the tax. Evidence of such change in property characteristics must be furnished to the Director in writing and the Director shall determine if the applicant qualifies for this deferral option. All requirements for the application for the deferral and the release of lien as provided for in this Section 4-18-4 of this chapter shall apply.

Comment [F58]: Review with Legal in light of Cook County requirements for diversion of demolition materials from landfills.

(D) Release of lien.

- (1) A person who exercised the tax deferral option provided for in Section 4-18-4(A), (B), or (C) and who has been the record title holder and occupant for three (3) consecutive years after issuance of a Final Certificate of Occupancy for the replacement structure may apply for release of the lien by making application therefor to the Director on a form provided for that purpose and available from the Building Permit Desk. Documentation the Director may require to establish the person's qualification for the release of lien may include, but shall not be limited to, income tax records and proof of voter registration for the years in question. If the Director determines that the person qualifies for the release, he/she shall provide the person with a recordable release of lien no later than thirty (30) days after he/she determines that the person qualifies for the release.
- (2) A person who exercised the tax deferral option provided for in Section 4-18-4(A), (B) or (C) who sells the subject property prior to the expiration of the three (3)-consecutive-year period after issuance of the Final Certificate of Occupancy shall, as a condition to the City's release of the lien, pay the tax due, to which shall be added interest at the annualized Money Market Index rate published by the Government Finance Officers Association.

(Ord. No. 139-0-05; Ord. No. 40-0-07; Ord. No. 62-0-11, § 2, 8-8-2011; Ord. No. 8-0-12, (48-0-11(exh. A, § 4-18-4)), 1-23-2012)

4-18-5. - STABILITY INCENTIVE.

When the tax was paid at the time of permit issuance as provided for in subsection 3(A) of this chapter, a person who has been the record title owner and occupant of a residential property demolished subsequent to the effective date of this chapter ("preexisting structure") for all of the three (3) years immediately preceding the date of the application for demolition ("prepermit period"), and remains the record titleholder and occupant of the property for three (3) consecutive years beginning immediately after the date on which the certificate of occupancy for the new residential structure is issued, may qualify for a monetary stability incentive in an amount equal to the demolition tax paid on the issuance of the permit for demolition of the preexisting structure, provided, however, that only persons whose real estate taxes on the property are paid in full at the time of application for stability incentive may apply for the incentive.

Application for the stability incentive payment shall be made to the director on a form provided for that purpose and available from the building permit desk. The person must provide the director of Community ~~and Economic~~ Development with such documentation as he/she may require to establish that the owner qualifies for the payment under the requirements of this section. Such documentation may include, but is not limited to, income tax returns and proof of voter registration for the years in question. The city shall pay qualifying persons an amount equal to the demolition tax, if any, imposed pursuant to this chapter on the issuance of the permit for the preexisting structure, less the amount of any liens recorded by the city against the subject property, including, but not limited to, liens for judgments entered in cases adjudicated in the city's Division Of Administrative Adjudication, no later than thirty (30) days after the Director of Community ~~and Economic~~ Development determines that an owner qualifies for the stability incentive.

(Ord. No. 139-0-05; Ord. No. 40-0-07; Ord. No. 8-0-12, (48-0-11(exh. A, § 4-18-5)), 1-23-2012)

4-18-6. - SEVERABILITY.

The provisions, sections, and subsections of this chapter shall be deemed separable, and the invalidity of any portion of this chapter shall not affect the validity of the remainder.

(Ord. No. 139-0-05; Ord. No. 40-0-07; Ord. No. 8-0-12, (48-0-11(exh. A, § 4-18-6)), 1-23-2012)

DEVELOPER CONTRIBUTIONS

Including, but not limited to, fees in lieu paid in compliance with the Inclusionary Housing Ordinance, fees for affordable housing negotiated in planned development agreements, and impact fees that may be assessed on development projects not covered by the inclusionary housing ordinance.

OTHER

Including, but not limited to, real estate transfer tax fees, hotel/motel taxes, a percentage of property taxes, or other sources as approved by City Council.