1. **BACKGROUND**

Lake County desires to increase the supply of long-term affordable housing for Lake County residents. Qualified Developer or team of Developers (Developer) shall construct one or more housing projects located within the jurisdictional boundaries of Lake County.

* 1. Project(s) will be funded by Coronavirus State and Local Fiscal Recovery Funds (CSLFRF), as established under the American Rescue Plan Act (ARPA) and must be eligible under one of the listed Federal Housing Programs or Income and Affordability Requirements.
     1. Federal Housing Programs
  + The National Housing Trust Fund (HTF, administered by HUD)
  + The Home Investment Partnerships Program (HOME, administered by HUD)
  + The Low-Income Housing Tax Credit (administered by Treasury)
  + The Public Housing Capital Fund (administered by HUD)
  + Section 202 Supportive Housing for the Elderly Program and Section 811 Supportive Housing for Persons with Disabilities Program (administered by HUD)
  + Project-Based Rental Assistance (PBRA) (administered by HUD)
  + Multifamily Preservation & Revitalization program (administered by USDA)
    - 1. Use of CSLFRF funds for affordable housing projects under Federal Housing Programs, requires the investment agreement to adhere to all applicable local rules, and comply, at a minimum, with applicable requirements related to:
  + Resident income restrictions;
  + The period of affordability and related covenant requirements for assisted units;
  + Tenant protections; and
  + Housing quality standards.
    1. Income and Affordability Requirements
       1. An investment in the development, repair, or operation of any affordable rental housing unit requires the units have a limited maximum income of 65% area median income (AMI), as imposed through a covenant, land use restriction agreement, or other enforceable legal requirement for a period of at least 20 years. The County may establish a longer period of affordability at its discretion. This presumption is available even if the project does not align with the Federal Housing Programs specified above.
       2. Developer may use separate funds as part of the financing for a mixed-income housing project if the total financing made up of SLFRF funds does not exceed the total development costs attributable to affordable housing units limited to households at or below 65% AMI for the affordability period.
          1. Example, if 25% of a project’s units are reserved for families at or below 65% AMI for the affordability period, and 20% of the total development costs of the project are attributable to such reserved units, then SLFRF funds may be used to pay for up to 20% of the total development costs.
       3. The income limit and 20-year affordability covenant does not need to apply to specific units, but rather it may specify several units within the development, in which case the covenant should also specify the bedroom size mix.

1. **COUNTY PRIORITIES**
   1. Housing inclusive of a wide range of affordability levels, or “mixed-income housing”, including developments that have units affordable to households earning at or below 30% of AMI (categorized as Extremely Low Income).
   2. Supportive housing, or developments in which 30% of the units are set-aside for special needs populations. Project(s) must include a plan for providing services to the special-needs populations, including partnerships or MOUs with local service agencies and an identified source(s) of funding for the ongoing operations of these units.
   3. Project(s) including an innovative, robust workforce development plan resulting in:
      1. Capacity building for local organizations including neighborhood associations, local housing or economic development, or non-profits (e.g. a substantive partnership with a neighborhood association, or the establishment of a community benefits agreement); and/or,
      2. Recruitment, training, and job opportunities for residents of the Project(s) neighborhood(s) (e.g. OSHA training for local residents providing jobs opportunities working on-site).
2. **APPROACH AND DELIVERABLES** 
   1. Developer shall incorporate the listed elements into the affordable housing proposal(s) and recommend an approach and project deliverables to address the listed elements. The approach shall include a robust stakeholder engagement process and plan for establishing and working with an advisory committee as part of program development.
   2. At a minimum, deliverables are anticipated to include:
      1. Work plan and schedule
      2. Advisory committee and stakeholder engagement
      3. Public engagement plan, materials, and facilitation
      4. Updates to the Planning Board and Board of County Commissioners
      5. Regular progress meetings and reports
      6. ArcGIS file geodatabase and GIS packages for all maps
      7. Draft, revised, and final Affordable Housing Plan
      8. Early implementation tools, as described under critical plan elements
      9. Advisory committee and stakeholder engagement
   3. The public engagement plan shall include an extensive outreach approach intended to gather input representative of diverse perspectives and backgrounds. Large workshops and surveys may be included but will not sufficiently address public engagement needs. Outreach methods shall be designed to ensure participation of minority communities, limited-English proficiency (LEP) communities, low-income communities, current users of affordable housing, youth, seniors, and individuals who work in Lake County but cannot afford to live locally.
3. **SCHEDULE**

The study process should be completed and approved within four months of the date of the notice to proceed (NTP). Developer shall propose a schedule for the services and deliverables to be provided addressing milestones and review periods.

1. **ELIGIBILITY**

Developer with resources available to support affordable housing plans, programs, and policies are preferred.

* 1. Proposals shall identify team members with the depth and breadth of experience in affordable housing and planning utilized to complete the project. Developer shall have the financial resources and ability to undertake the work in its entirety and shall have adequate accounting systems to identify costs chargeable to the project.
     1. Understanding of the project elements and recommended approach, deliverables, and schedule of tasks and milestones.
     2. Identification of similar work performed within the past seven years including points of contact (name, email, phone number) for references and identification of the roles of assigned project personnel on referenced similar work.
     3. Description of relevant work experience, capabilities, and expertise which qualify the personnel assigned to this project to undertake the project.
  2. Developer shall remain in compliance of 2 CFR Part 200 and the reporting requirements of the Coronavirus State and Local Fiscal Recovery Funds (CSLFRF), including providing all necessary reports in a timely manner to the County as part of any resulting contract.
  3. Developer shall agree to completion of Exhibit D – Lake County Federal Funding Accountability & Transparency Act Form.

1. **PROGRAM CONSIDERATIONS**
   1. **Congregate Housing**
      1. Design of a multi-unit detached affordable housing village located on 28123 County Road 561, Tavares, FL, 32778 or similar sized property.
      2. Construction of 20 functional individual living units to be used for temporary housing or emergency housing.
      3. Units may be site-built or prefab (e.g., park models).
      4. Site should be a balance of maximizing the number of affordable units while maintaining neighborhood compatibility.
      5. The site perimeter shall provide a thoughtful transition and relationship to the surrounding neighborhood through design, materials, and massing.
      6. Site plan should encourage a sense of community and establish connections with nearby amenities.
   2. **Scattered Housing**
      1. Submit Proposals for Construction of Affordable Single Family or Multi-Family Housing units to be used as housing to residents who are transitioning to permanent housing. A concentration on housing for senior citizens and Veterans is preferred.
      2. The County desires a balance of maximizing the number of affordable units on the site while maintaining neighborhood compatibility. Attention should be given to the perimeter of the site to provide transition and relationship to the surrounding neighborhood through design, materials, and massing. The proposal and site plan should encourage a sense of community and establish connections with nearby amenities.
      3. Locate existing 1-, 2-, and 3-bedroom homes or duplexes to be purchased by the County to utilize for transitional housing.
      4. Locate existing lots to be used for the purpose of constructing 1-, 2- and 3-bedroom single family homes or duplexes. Make an offer to purchase subject to County’s acceptance of the location, price, and terms.
      5. Construct 1-, 2-, and 3-bedroom homes or duplexes, or, in appropriate locations, purchase and install prefab or manufactured homes (e.g., vacant rural lots where other mobile homes are in surrounding area.).
         1. Coordinate with County Project Manager to seek waivers for building permits, water and sewer impact fees and connection fees from municipalities, school impact fees and county impact fees. It is optional if a Developer wants to propose or identify other ways to save money on the cost of construction (donation of materials, labor, non-profit participation).
      6. Formulate templates of floor plans and elevations to be used on various lot sizes. The templates should meet industry standards for "affordable construction" to greatest extent possible and be functional for the purpose of the Program, and the elevations and design of the homes should be compatible with other residential structures and be readily marketable by the County if the Program is discontinued.
         1. It is recommended to utilize design criteria required for the County's current impact fee infill waiver program be incorporated into proposed elevations.
   3. **Property Management**
      1. Proposal shall present Developer qualifications for property management of the County’s Affordable Housing Properties. Management Services shall not exceed $500,000.00.
      2. Provide a concise description of the approach and process to successfully perform services including any specific staffing or equipment resources. Proposal to include but not limited to:
         1. Any required licensing.
         2. Resumes and licenses and/or certifications related to federal funding, of the individuals to be assigned to project detailing skills in managing similar projects.
         3. A list of proposed subcontractors or joint venture arrangements that may be utilized.
         4. Proposed costs / fee schedule.
         5. Past projects similar in nature.
         6. Ability to comply with all Federal, State, and local laws and regulations.
         7. Any data Developer deems pertinent to the understanding and evaluation of the Proposal.
      3. Developer shall detail plans on:
         1. How to comply with regulations (Federal, State, and local).
         2. How to bill and collect rent.
         3. How to address issues necessary to properly maintain properties.
         4. How to confirm tenants abide by leasing agreements.
         5. How to coordinate all repairs in a timely manner.
   4. **Transitional Housing**
      1. Detail plans on how the Firm will provide short term housing with financial literacy classes and supportive services.
      2. Short term is defined as less than 24 months.
   5. **Pocket Neighborhoods**
      1. Pocket neighborhoods are clustered groups of neighboring houses or apartments gathered around a shared open space — a garden courtyard, a pedestrian street, a series of joined backyards, or a reclaimed alley — all of which have a clear sense of territory and shared stewardship.
      2. To ensure privacy between neighbors, the cottages ‘nest’ together:  the ‘open’ side of one house faces the ‘closed’ side of the next. The open side has large windows facing its side yard (which extends to the face of neighboring house), while the closed side has high windows and skylights.
      3. Successful pocket neighborhoods start with the central idea of a limited number of dwellings gathered around shared common grounds. When the number gets larger than 8 or 12, other clusters form around separate shared commons, connected by walkways. Multiple clusters can form a larger aggregate community. It is essential that cars and traffic do not invade the shared pedestrian space. The active rooms of the homes, including front porches, face the commons. A layering of public to private space, and careful placement of windows ensures privacy for each dwelling.
      4. Work with zoning regulations that limit housing to detached, single family homes on large private lots with a street out front.

*[Nothing Follows]*