



FY 18-19 Housing Department Work Plan

March 6, 2018

The Jackson/Teton County Affordable Housing Department's annual work plan is informed by the Workforce Housing Action Plan (2015) and the Jackson/Teton County Comprehensive Plan (2012).

The FY18-19 Work Plan details the list of Housing Department tasks that will be continued or begun between March 2018 and June 30, 2019. The Gantt chart provided below provides a wider view of the new and existing work and reflects implementation efforts for 2018 and 2019.

FY 18-19 Work Plan Summary				
Task	FY 18		FY 19	
	2018	2019	2018	2019
Workforce Housing Supply				
174 N. King Street (Town)				
Grove Phase 3 (County)				
Redmond Street Rentals (Both)				
Jackson/Kelly Street (County)				
105 Mercill Ave (County)				
Land Acquisition & PPP Development (Both)				
Supply Plan Annual Update (Both)				
Capital Programs (Both)				
Engage 2017: Housing, Zoning, Parking, and Natural Resources				
Housing Rules & Regulations Update				
Joint Housing Mitigation LDRs				
Town Zoning & Parking				
Data Collection & Maintenance				
Online Intake Form				
Employee Housing Needs Assessments				
Online Lottery Entry Form				
Online Application Form				
Apartment Annual Reports				
Compliance				
Annual Verification: Employee				
Annual Verification: Employment				
Active Compliance				
Education & Outreach				
Multimedia education materials				
Housing Stock Portfolio				
Annual Report				
Management				
Town/County Employee Rental Program				
Grove Phase 1 Rentals				
Existing Development Assistance				
New Development Review				
Sales and Resales				

A more detailed description of each FY18-19 Work Plan task is provided below. Each task description summarizes the task goal, status, next steps, and the Workforce Housing Action Plan and/or Comprehensive Plan principles, policies, and strategies informing the task.

Workforce Housing Supply

174 N. King Street

Goal: To partner with a private developer to construct workforce housing at 174 N. King Street, a Town of Jackson-owned property. **Status:** The Town Council approved the RFP November 6, 2017; the RFP was released November 7, 2017. Nine responses were received February 9, 2018 and vetted by the Housing Supply Board and Housing Director. A recommendation was made to the Town Council on March 5, 2018. **Next steps:** Town Council will award the project and staff will work with the chosen partner to craft a development agreement for the project. Town Council will need to approve the agreement. Once approved, staff will work closely with the development partner to ensure construction is complete within the parameters laid forth in the signed development agreement.

- HAP Strategy: 2A, 2B, 2E
- Comp. Plan Policy: 5.1.a, 5.1.b, 5.2.d, 5.3.c

<u>Timeline</u>	
Develop RFP	2017 Q4
Award Project	2018 Q2
Sign Dev. Agreement	2018 Q3
Certificate of Occupancy	2020 Q4

Grove Phase 3: 24 Units

Goal: Partner with Habitat for Humanity to construct 24, Category 1 units at the Grove in Midtown. **Status:** Habitat has broken ground on the first 8 units and has chosen the families for these units. Construction is on schedule and certificates of occupancy are expected by September 2018. Phase 2 of the infrastructure (curb, gutter, paving) will begin in June 2018. **Next steps:** Continue working with Habitat to ensure smooth integration of the new units into the Grove Phase 2 HOA. Manage infrastructure work.

- HAP Strategy: 2A, 2B
- Comp. Plan Policy: 5.1.a, 5.1.b, 5.3.c

<u>Timeline</u>	
Phase 2 Infrastructure	2018 Q3
Home Dedication	2018 Q3

Redmond Street Rentals: 28 Units

Goal: Partner with Jackson Hole Community Housing Trust to construct 26 new (plus 2 existing) workforce rental units in East Jackson. **Status:** All Town and Housing Authority funds have been used and the accounts at Rocky Mountain Bank have been closed. **Next steps:** The Trust anticipates that the units will be ready for occupants by August 2018. The Housing Department will work with the Trust to develop an annual report that the Trust will be required to complete annually for the project.

- HAP Strategy: 2B
- Comp. Plan Policy: 5.1.a, 5.1.b, 5.2.d, 5.3.c

<u>Timeline</u>	
Quarterly Reports	2018 Q1
	2018 Q2
	2018 Q3
Certificate of Occupancy	2018 Q3
Develop Annual Report	
Template	2019 Q1
Request Information	2019 Q3
Report Due	2019 Q4

255 & 257 West Kelly Avenue, 360 & 380 South Jackson Street

Goal: Develop the property for Teton County Government employee housing and community workforce housing. **Status:** Negotiations with the adjacent landowner have not resulted in a partnership as hoped. **Next steps:** Complete zoning update. Trade land or release RFP to develop workforce housing at the site.

- HAP Strategy: 2A, 2B, 2E
- Comp. Plan Policy: 5.1.a, 5.1.b, 5.3.c

Timeline

Zoning Update	2018 Q3
Release RFP	2018 Q4
Award Project	2019 Q1

105 Mercill Avenue

Goal: Develop the property for community workforce housing. **Status:** Teton County owns this property, which already provides a home to the Children's Learning Center. The current tenant on the east side of the property, the Jackson Hole Historical Society, has a signed lease that expires March 31, 2019. **Next steps:** Develop RFP for site, release RFP, award project, build project.

- HAP Strategy: 2A, 2B
- Comp. Plan Policy: 5.1.a, 5.1.b, 5.3.c

Timeline

Develop RFP	2018 Q4
Release RFP	2019 Q1
Award Project	2019 Q2

Land Acquisition & PPP Development

Goal: Acquire land in Complete Neighborhoods where workforce housing development is appropriate. Partner with the private sector to develop workforce housing. **Status:** Ongoing. **Next steps:** When land is identified, bring the opportunity to the Town Council and Board of County Commissioners for consideration.

- HAP Strategy: 2B
- Comp. Plan Policy: 5.1.a, 5.1.b, 5.2.b, 5.3.c

Timeline

Continuous throughout the year.

Supply Plan Annual Update

Goal: Annually update the 5-Year Housing Supply Plan to inform the public about trends related to workforce housing and the steps being taken to address workforce housing supply and preservation. **Status:** 2017 Housing Supply Plan was approved 2017 Q3. **Next steps:** Draft the 2018 Plan and present to the Town Council and Teton County Board of Commissioners for approval.

- HAP Strategy: 2
- Comp. Plan Policy: 5.4.a

Timeline

Draft Plan	2018 Q2
Plan Approval	2018 Q3
Draft Plan	2019 Q2

Capital Programs

Goal: Create assistance programs to catalyze private development of workforce housing. **Status:** Developing programs with the Housing Supply Board. **Next steps:** Incorporate at least one new capital program in the 2018 Housing Supply Plan.

- HAP Strategy: 2C, 2D, 5B
- Comp. Plan Policy: 5.1.b, 5.4.d

<u>Timeline</u>	
Develop Program	2018 Q2
Program Approval	2018 Q3
Implementation	2018 Q4

Engage 2017: Housing, Zoning, Parking, and Natural Resources

Housing Rules & Regulations Update

Goal: In response to the Workforce Housing Action Plan, the Housing Department is working to update the Housing Rules and Regulations, which were last updated in 2008. The goal is to have the Housing Rules and Regulations adopted by the Jackson Town Council and Teton County Board of County Commissioners on June 4, 2018. The Housing Rules and Regulations will be updated at least every five years going forward. **Status:** Updated document was adopted June 4, 2018. **Next steps:** Continuous evaluation of the processes, procedures, and regulations will be made by the Housing Department. Needed changes will be brought before the Town Council and County Commission for updates every five years. Time sensitive changes will be brought as necessary on an annual basis.

- HAP Strategy: 3B
- Comp. Plan Policy: 5.1.a, 5.1.b, 5.1.c

<u>Timeline</u>	
Final Draft from Clarion	2018 Q1
Town/County Review	2018 Q2
Public Review	2018 Q2
Final Adoption	2018 Q2

Joint Housing Mitigation LDRs

Goal: To collaborate with the Town and County Planning Departments to make necessary updates to the Joint Housing Mitigation LDRs to function consistently and cohesively with the Housing Rules and Regulations, and to address the community's housing needs. **Status:** Final approval is scheduled for July 2, 2018. **Next steps:** Continuous evaluation of the Housing Mitigation LDRs and make recommendations on future changes.

- HAP Strategy: 3, 5C
- Comp. Plan Policy: 5.1.a, 5.1.b, 5.3.a

<u>Timeline</u>	
Final Draft from Clarion	2018 Q1
Town/County Review	2018 Q2
Public Review	2018 Q2
Final Adoption	2018 Q3

Town Zoning & Parking

Goal: To collaborate with the Town Planning Department to make necessary updates to the Town Zoning and Parking LDRs as they relate to housing. **Status:** Final approval is scheduled for July 2, 2018. **Next steps:** Continuous evaluation of the Zoning and Parking LDRs and make recommendations on future changes.

- HAP Strategy: 5A, 5B
- Comp. Plan Policy: 5.4.b, 5.4.d

<u>Timeline</u>	
Final Draft	2018 Q1
Town/County Review	2018 Q2
Public Review	2018 Q2
Final Adoption	2018 Q3

Data Collection & Maintenance

Online Intake Form

Goal: To provide a streamlined lottery process and to collect annual demographic and housing demand data. *Status:* Intake form went live January 2, 2018. *Next steps:* Work with customers and consultants to evaluate the functionality of the intake form. Make necessary changes in July 2018.

- HAP Strategy: 2F, 3C, 4B
- Comp. Plan Policy: 5.4.c

<u>Timeline</u>	
Launch Online	2018 Q1
Update	2019 Q3

Employee Housing Needs Assessments

Goal: Complete employee housing needs assessments for Teton County and the Town of Jackson to better inform their employee housing programs moving forward. *Status:* Complete.

- HAP Strategy: 2E
- Comp. Plan Policy: 5.2.c

<u>Timeline</u>	
Surveys	2017 Q3
TCG Draft	2018 Q1
TCG Final	2018 Q2
ToJ Final	2018 Q2

Online Lottery Entry Form

Goal: To streamline the lottery entry process for both applicants and staff. To secure information provided by applicants and decrease the potential for human error. *Status:* Greenwood Mapping is implementing a comprehensive integration of the current database, consolidating the backend, and converting some frontend components out of Access into web forms. *Next steps:* By mid-August the online lottery form should be ready to go live. Document upload functions should be ready by November.

- HAP Strategy: 3C
- Comp. Plan Policy: 5.4.c

<u>Timeline</u>	
Database Integration	2018 Q2
Form Development	2018 Q3
Launch Online	2018 Q3
Document Upload	2018 Q4

Online Applicant Status

Goal: Full on-line applicant "status" e.g. what categories an applicant qualifies for, what paperwork still needs to be uploaded, what data needs to be completed or updated. *Status:* Have not begun. *Next steps:* Work with Greenwood Mapping to create.

- HAP Strategy: 3C
- Comp. Plan Policy: 5.4.c

<u>Timeline</u>	
Development	2019 Q1
Launch Online	2019 Q2

Apartment Annual Reports

Goal: To collect market and restricted data on the community's rental market. *Status:* Working with the Planning Department to develop metrics to track. *Next steps:* Interview local apartment managers, aggregate data, and provide as a resource to the community and elected officials.

- HAP Strategy: 2C
- Comp. Plan Policy: 5.2.d, 5.4.c

<u>Timeline</u>	
Develop	2018 Q4
Data Collection	2019 Q1
Publish	2019 Q2

Compliance

Annual Verification: Employee

Goal: Ensure that all dedicated employee housing units or restricted accessory residential units (ARU) are complying with the requirements of their restriction. *Status:* Current employee housing restrictions tend to vary drastically on components of compliance. It takes considerable time to gather background on each restriction, determine what documents are needed for verification and what remedies are available in the event an owner is found in violation of the restriction. Owner outreach is critical in recognition of the restriction and obtaining requested documents for verification. Once all current owners have been contacted, the Housing Department expects that future annual verifications will go more smoothly. *Next steps:* Housing Dept. will use standardized employee housing restrictions with identifiable remedies approved by the Town Council and Board of County Commissioners. The Housing Department is researching various methods of notification to the department for any sale of an employee housing unit and/or ARU. Owners of new units attached to employee housing restrictions will sign an affidavit acknowledging that they have received and understand the annual verification requirements of the Employee or ARU restriction.

- HAP Strategy: 3A
- Comp. Plan Policy: 5.1.a

<u>Timeline</u>
Continuous throughout the year.

Annual Verification: Employment

Goal: Ensure that owners of Employment-Based units are complying with the requirements of their recorded restriction. *Status:* For 2017, 2 households were forced to sell their units for non-compliance. The remaining homeowners are following the restriction requirements.

Next steps: Notification of annual requalification will be emailed to each owner prior to the extended IRS tax deadline in October. Annual requalification documents will then be mailed to homeowners. Homeowners will be given 45 days to return the requested information to the Housing Department. The Housing Department will continue to track those units where homeowners have reached retirement age. New owners will have to sign an affidavit attesting that they have received and understand the annual verification requirements of their restriction.

- HAP Strategy: 3A
- Comp. Plan Policy: 5.1.a, 5.1.b

<u>Timeline</u>	
Requalification	2018 Q4
Complete	2019 Q1

Active Compliance

Goal: To ensure compliance in all Housing Department program homes. To objectively, competently and completely investigate any information, complaint, or report of a violation of special restrictions received by the Housing Department. **Status:** Over 140 compliance related issues were received and investigated in 2017. Of those, 10 were identified as a major violation. Of those 10, 5 homeowners were able to cure the violation and the other 5 resulted in a forced sale. The Housing Department has provided the ability to report a violation on our website. Information is provided on the website that helps categorize the nature of the complaint and the property in question. Reports can be submitted anonymously. **Next steps:** Ongoing compliance occurs daily when information is received.

- HAP Strategy: 3C
- Comp. Plan Policy: 5.1.a, 5.1.b

<u>Timeline</u>
Continuous throughout the year

Education & Outreach

Multimedia Education Materials

Goal: Provide the public with a comprehensive educational experience about the location and types of existing restricted housing stock, the process to purchase or rent a restricted home, data, and the reason the housing programs exist. **Status:** Work was completed on a white board video for the Engage 2017 Update to the Housing Rules and Regulations. Plans are in place for five more white board videos. Plans are in place to create aerial photos and videos of existing housing and potential locations of future housing with educational narratives. **Next steps:** Develop white board videos. Complete a plan for aerial drone videos and aerial photography. Updates to Portfolio of Housing Stock. Work on Annual Report. Creation of a quarterly newsletter.

- HAP Strategy: 2F, 4A
- Comp. Plan Policy: 5.1.a

<u>Timeline</u>	
Develop Whiteboards	2018 Q2
Release Whiteboards	2018 Q3
Aerial Photography	2018 Q3
Still Photos	2018 Q3
Quarterly Newsletter	2018 Q3
Develop Annual Report	2018 Q4
Quarterly Newsletter	2018 Q4
Release Annual Report	2019 Q1
Update Housing Portfolio	2019 Q1
Quarterly Newsletter	2019 Q1
Quarterly Newsletter	2019 Q2

Housing Stock Portfolio

Goal: To provide the Town and County elected officials and the community with an inventory of restricted housing stock along with costs to build, public subsidies, unit types, and unit categories.

Status: The first Housing Stock Portfolio was published in 2018.

Next steps: The Housing Department will update the Housing Stock Portfolio annually.

- HAP Strategy: 2F
- Comp. Plan Policy: 5.1.a

<u>Timeline</u>	
Update	2019 Q1
Release Online	2019 Q2

Annual Report

Goal: To educate the Town and County elected officials and the public about what the Housing Department has accomplished each year. **Status:** The first Housing Department Annual Report was published in March of 2018. **Next steps:** Track data and provide a new Annual Report each year.

- HAP Strategy: 2F
- Comp. Plan Policy: 5.1.a

<u>Timeline</u>	
Development	2018 Q4
Release	2019 Q1

Management

Town/County Employee Rental Program

Goal: To manage the Town and County's employee housing rental programs according to each organization's policy. **Status:** Management of both programs is on-going. **Next steps:** Provide information to potential tenants, collect rents, and facilitate the rental processes.

- HAP Strategy: 3

<u>Timeline</u>	
Continuous throughout the year.	

Grove Phase 1 Rentals

Goal: To ensure vacancies are kept to a minimum, tenants are qualified under occupancy, income and asset limits, the building is being properly maintained; that it is a safe and enjoyable place for tenants, bills are being paid, and the operations and maintenance budget is at least breaking even. **Status:** The building is currently at zero vacancy, all tenants are qualified, the building is in good repair, bills are being paid, and the budget is in the black. **Next steps:** Annual lease renewals and qualifications for residential tenants. Continue to work with property management company on maintenance, inspections, and tenant issues, bill payment, collection of rent from residential and commercial units, billing of utilities for commercial units, monthly review and evaluation of financials.

- HAP Strategy: 3
- Comp. Plan Policy: 5.1.a, 5.1.b

<u>Timeline</u>	
Notice sent for renewal and requalification	2018 Q2
Renew/Requalify	2018 Q3
Management	Ongoing

Existing Development Assistance

Goal: Ensure that HOAs are functioning in a healthy manner financially, that they understand their role, their Covenants, Conditions and Restrictions and the Housing Department's Role and Restrictions. To provide a resource for educational assistance to homeowners and HOA boards when needed. **Status:** Housing Department staff attends HOA meetings when requested, responds to questions from owners, and in 2017, helped 20 owners who were delinquent (some thousands of dollars) on their HOA dues get current. Held an open house to educate owners of sunset clause homes about what would happen when their deed restriction was no longer binding. **Next steps:** Reach out to HOAs to remind them of Housing Department services. Continue to attend HOA meetings when requested and assist owners and HOAs in other ways that we can be of service.

- HAP Strategy: 3

<u>Timeline</u>	
Continuous throughout the year	

New Development Review

Goal: Ensure that the Housing Rules and Regulations are being met by proposed restricted units in development applications.

Status: Reviewed 34 developments for compliance with the Housing Rules and Regulations in 2017. Housing Department gained access to Trakit, the Town of Jackson Planning and Building database in 2017. *Next steps:* Continue to review development applications as they are submitted to Planning, work with developers in advance to educate them on the expectations and requirements of the Housing Rules and Regulations.

- HAP Strategy: 3B
- Comp. Plan Policy: 5.1.a

<u>Timeline</u>
Continuous throughout the year

Sales and Resales

Goal: To provide a streamlined transaction between buyer and seller in a time sensitive manner, to ensure homes are not sold for more than their Maximum Resale Value, to ensure buyers are qualified according to the home's deed restriction and the Housing Rules and Regulations, and to ensure the homes are maintained over time.

Status: Ongoing. *Next steps:* Facilitate sales with buyers and sellers as existing owners desire to sell their homes. Work with developers of new units to create marketing plans and sales/lottery plans. 28 new units are expected to come on line in 2018.

- HAP Strategy: 3
- Comp. Plan Policy: 5.1.a, 5.1.b, 5.1.c

<u>Timeline</u>
Resales are ongoing

5-Year Work Plan

The 5-Year Work Plan is intended to give the community, elected officials, and staff an idea of what projects are slated for implementation over the next few years. Projects that are beyond FY 18-19 are not yet funded and meant to help set future expectations and priorities.

5-Year Work Plan Summary					
Task	FY 17-18	FY 18-19	FY 19-20	FY 20-21	FY 21-22
Workforce Housing Supply					
174 N. King Street (Town)					
Grove Phase 3 (County)					
Redmond Street Rentals (Both)					
Jackson/Kelly Street (County)					
105 Mercill Ave (County)					
Land Acquisition & PPP Development (Both)					
Supply Plan Annual Update (Both)					
Housing Nexus Study					
Capital Programs (Both)					
Engage 2017: Housing, Zoning, Parking, and Natural Resources					
Housing Rules & Regulations Update					
<i>Joint Housing Mitigation LDRs</i>					
<i>Town Zoning & Parking</i>					
Data Collection & Maintenance					
Online Intake Form					
Employee Housing Needs Assessments					
Online Lottery Entry Form					
Online Application Form					
Apartment Annual Reports					
Compliance					
Annual Verification: Employee					
Annual Verification: Employment					
Annual Check In: Affordables					
Active Compliance					
Education & Outreach					
Multimedia education materials					
Housing Stock Portfolio					
Annual Report					
Management					
Town/County Employee Rental Program					
Grove Phase 1 Rentals					
Existing Development Assistance					
New Development Review					
Sales and Resales					

Completed Work Plan

This is the second Work Plan since adoption of the Workforce Housing Action Plan in 2015. Below is a list of work completed or that will be complete by the end of FY 17-18.

Completed Work Plan			
Task	Date Complete	HAP Strategy	Comp Plan Policy
Workforce Housing Supply			
Hire Housing Director	July-16	Ch. 1	5.4.a
Initial Supply Plan Approved	November-16	Ch.2	5.4.a
Grove Phase 3 - Development Agreement	December-16	2A, 2B	5.1.a, 5.1.b, 5.3.c
Create and Appoint Housing Supply Board	December-16	Ch. 2	5.4.a
Grove Phase 3 - Phase 1 Infrastructure Complete	January-17	2A, 2B	5.1.a, 5.1.b, 5.3.c
Redmond Street Rentals - Development Agreement	February-17	2B	5.1.a, 5.1.b, 5.2.d, 5.3.c
2017 Supply Plan Approved	October-17	Ch. 2	5.4.a
174 N. King Street - RFP Released	November-17	2A, 2B, 2E	5.1.a, 5.1.b, 5.2.d, 5.3.c
174 N. King Street - Award	March-18	2A, 2B, 2E	5.1.a, 5.1.b, 5.2.d, 5.3.c
174 N. King Street - Development Agreement	May-18	2A, 2B, 2E	5.1.a, 5.1.b, 5.2.d, 5.3.c
Engage 2017: Housing, Zoning, Parking, and Natural Resources			
Housing Rules & Regulations Update	June-18	3B	5.1.a, 5.1.b, 5.1.c
Data Collection & Maintenance			
Community Customer Service Survey	July-17	2D, 2F	5.1.a
Online Intake Form	February-18	2F, 3C, 4B	5.4.c
TCG Employee Housing Needs Assessment	March-18	2E	5.2.c
ToJ Employee Housing Needs Assessment	March-18	2E	5.2.c
Compliance			
Hire Compliance Specialist	November-16	3A	5.1.a
Initiate Annual Compliance on Employment-based and Employee Units	June-17	3A	5.1.a, 5.1.b
Complete Annual Compliance on Employment-based Units	January-18	3A	5.1.a
Education & Outreach			
Housing Stock Portfolio	March-18	2F	5.1.a
Annual Report	March-18	2F	5.1.a