Community Transformation Plans:  
The Public Perspective on Housing as a Platform for Community and Resident Health

Charles Whatley  
Economic Development Advisor  
Warner Robins, Georgia

Jekyll Island, Georgia  
September 6, 2018  
Georgia Planning Association Fall 2018 Conference
Planning Correctly Is Everything.....

“We made a miscalculation, but it's consistent with our overall strategy.”
The benefits of partnering/coordinating for growth:

• Improved economic development execution
  • Focus on core mission while partners execute on their strengths
• New perspectives on old problems
• Expanded reach into the market
• Increased capacity for economic development
  • Linkages to resources
  • Sharing of costs ($ and time)
• Flexible use of resources
Prime P3 Project Candidates

• Infrastructure

• Municipal Facilities

• Hotel and Conference Centers

• Parks and Recreation

• Affordable Housing

• Healthcare

• Education
Public Sector Rationale

• Commercial conversations about project, economics and requirements

• Delaying capital plans risks higher costs later

• Competing priorities and politics

• Limited debt capacity, “inability” to raise taxes, or limited financing options

• New or increased demand on services, facilities or infrastructure

• Referendum fear

• Long standard procurement cycle
The P3 Process - Public Sector

• Defining the Project and Investment Decision
• Procurement Decision
• Value for Money Analysis
• Integrated Recommendation
• Project Funding and Affordability
• Procurement Strategy
• Implementation Plan
Managing Risk is Essential

"We've considered every potential risk except the risks of avoiding all risks."
<table>
<thead>
<tr>
<th>Entities for Economic and Community Development</th>
</tr>
</thead>
<tbody>
<tr>
<td>Development Authority</td>
</tr>
<tr>
<td>Redevelopment Agency</td>
</tr>
<tr>
<td>Downtown Development Authority</td>
</tr>
<tr>
<td>Community Improvement District (CID)</td>
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<tr>
<td>Business Improvement District (BID)</td>
</tr>
<tr>
<td>Community Development Finance Institution (CDFI)</td>
</tr>
<tr>
<td>EB-5 Regional Center</td>
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# Tools for Redevelopment Projects

<table>
<thead>
<tr>
<th>Tools for Redevelopment Projects</th>
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<tbody>
<tr>
<td>Enterprise Zones</td>
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<tr>
<td>Urban Redevelopment Area</td>
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<tr>
<td>New Market Tax Credits</td>
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<tr>
<td>EB-5 Financing</td>
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<td>Brownfield Programs</td>
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<tr>
<td>CDBG</td>
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<tr>
<td>State and Local Economic Development Incentives and Grants</td>
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<tr>
<td>Economic Development Administration (Commerce) grants</td>
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<tr>
<td>HUD 108</td>
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<tr>
<td>Assessment Districts</td>
</tr>
<tr>
<td>Opportunity or Military Zone</td>
</tr>
<tr>
<td>Workforce Housing Tax Credits</td>
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<tr>
<td>Historic Tax Credits</td>
</tr>
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</table>
Thank you!

Charles Whatley – Economic Development Advisor

Development Authority of the City of Warner Robins

Warner Robins Downtown Development Authority

Warner Robins Redevelopment Agency

cwhatley@developwr.com

(478) 225-8013
Pennrose Development wins Tax Credits from DCA and kicks off design

CVB becomes part of the Economic Development team

Fiber City project begins design and permitting

Walk at Sandy Run park land is gifted to the DAWR as part of Pines @ Westdale project

JDA purchase land for industrial park in Warner Robins-Peach County

Vantage begins construction on Pines at Westdale multi-family project

Highlights of 2017

Development Authority of the City of Warner Robins
Act as the tip of the spear for facilitating commercial, industrial and residential economic vitality in the City of Warner Robins.
Our Focus

New Jobs and Companies

New Technology and Aviation-Related Jobs

Increase in Property Value

New Affordable Workforce and Student Housing Units

New Recreation Facilities, Parks and Greenspace

Collaborate with Higher Education to Attract Industry and Students

Support Tourism and Conference Trade
City Fiber – A2D Key Benefits to Warner Robins, GA

- **Fiber City – 1Gbps+**
  - More secure, economical and efficient City WAN operations and ownership.
  - Attractive to Tech/Manufacturing Industries, Professionals & Entrepreneurs
  - Enables enhanced at-home digital learning & telehealth services

- **Smart Utility Integration – Remote Metering, Enhanced Public Safety, Smart Lighting, etc.**

- **Intranet – Distance Learning, Telehealth, Workforce Dev, Virtual Classrooms**
  - Directly connect with Tier 1 Universities and Fortune 1000 Industries
  - Directly connect with Municipal, State and Federal Agencies – .gov, .edu, etc.

- **Direct Connect with Warner Robins AFB – securely linking base & city resources.**
  - Direct connect fire & public safety resources.
  - Direct connect to contractors and vendors on/off base.
  - Direct connect to veterans to critical on base resources.

- **Consumer Choice – Open Private Network allows for Multiple providers.**
  - Quality services at lower cost – Internet, IPTV, VoIP, Netflix Direct, etc.
  - Flexible payment plans – Month-to-Month, Credit Challenge, etc.

- **Revenue Share from broadband expansion for Economic Development.**

  Development Authority of the City of Warner Robins
Pennrose Wall Street Project

90 units workforce rental housing in phase I
90 additional units in phase II

20 townhomes + commercial/retail
Partnering with VECTR to provide cost-free housing to active duty & veterans while attending training.
Vantage Development

Pines at Westdale
Multi-family
180-units

Development Authority of the City of Warner Robins
Walk at Sandy Run Park

- 11.2-acre linear park
- 4-acre site for parking
Coordinating the Authorities

Development Authority of the City of Warner Robins, Georgia (DAWR)
- Primary Economic Development arm of the City of Warner Robins citywide
- Promotes Public-Private Partnerships (P3) for economic development projects

Warner Robins Downtown Development Authority (DDA)
- Responsible for Downtown development in the City
- Redevelopment agent for the Tax Allocation District

Warner Robins Redevelopment Agency (RDA)
- Responsible for redevelopment of an area of the City that has experienced disinvestment
- Military Zone is part of the RDA footprint
Gary Lee, Director

DEPARTMENT OF ECONOMIC DEVELOPMENT
CITY OF WARNER ROBINS, GEORGIA
Transformational Communities: Planning as a platform for community health & housing
What is the Housing Tax Credit and the QAP?
What are Housing Tax Credits (LIHTC)?

- The IRS allocates ~$2.35/resident to each state
- Developers compete to win award of credits
- Private investors contribute equity to build housing and receive benefits of the tax credits
- Housing is built and rents must be affordable (typically 60% AMI) for 30 years
- Once housing is inhabited, then tax benefits begin
States allocates LIHTC via Qualified Allocation Plan

- Each State sets their own criteria for the competitive selection of affordable housing developers to receive LIHTC
- These priorities and criteria are summarized in the Qualified Allocation Plan (QAP)
  - Site-based criteria
  - Property-based incentives
- QAP differentiates between:
  - Pool: Flexible (Urban, Suburban) and Rural
  - Tenancy: Properties serve Families or Seniors
Planning and the QAP
QAP already builds on local planning efforts

- IRS requires that States give preference in selection to those properties that “are located in Qualified Census Tracts, the development of which contributes to a concerted community revitalization plan.”

- Definitions:
  - QCT: 50% of households in a Census Tract with incomes below 60% of Area Median Gross Income (AMGI)
  - Concerted community revitalization plan: Up to State discretion
DCA’s definition: “Concerted Community Revitalization Plan”

Must include:

a) Targeted area including proposed site
b) Public input and engagement
c) Policy goal of affordable housing
d) Designate implementation measures along with specific timeframes
e) Assessment of the community’s physical structures
f) Discussion of resources for plan implementation
g) Official Local Government adoption

Cannot be:

a) Formulated by a Project Team member and submitted to a Local Government for approval
b) A short-term work plan, comprehensive plan, consolidated plan, municipal zoning plan or land use plan
c) Outdated and not reflective of current neighborhood conditions
Moving from Revitalization to Transformation
Key differences: Revitalization v. Transformation

- Authoring entities

<table>
<thead>
<tr>
<th>Public Participation</th>
<th>CCRP</th>
<th>Transformation Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>Affordable housing developer involvement</td>
<td>Prevented</td>
<td>Required</td>
</tr>
<tr>
<td>Cross-sector collaboration</td>
<td>Absent</td>
<td>Required</td>
</tr>
</tbody>
</table>

- Purpose: Strategies for how one affordable housing development
  1. Implements the infrastructural aims of existing revitalization plans targeting a specific area;
  2. Catalyzes improved collaboration among health, education, transit, employment providers serving that area
Who: Community-Based Transformation Team

**Community-Based Developer**

At least two of the following:

- Partnerships with at least 2 community nonprofits resulting in measurable resident/community improvements
- Participated/led philanthropic activities benefitting community
- Selected by Local Government through RFP

OR

- Selected by DCA as Community Housing Development Organization & received commitment for DCA HOME funds

**Community Quarterback**

- Drives the revitalization initiative to make sure the housing, education, and wellness components are successful and sustainable;
- Ensures residents are engaged, included, and served
- Single point of accountability for partners and funders.

**AND**

- have a demonstrated record of increasing residents’ access to resources such as employment, education, transportation, and/or health
Transformation Partners

- Transformation Partners: Identified Sectors
  - K-12 school district representative
  - Employment services provider
  - Transportation services provider
  - Local health provider

- Public & Private Engagement Requirements
  - Family Applicants engage at least two
  - Seniors engage at least one
  - At least one meeting between Partners open to public to identify challenges to transformation
Where: Defined Neighborhood (DN)

- Developer works with Transformation Team to identify a Defined Neighborhood around the proposed development

Location:
- Transformation Plan requires assessment of existing and/or past revitalization strategies directly affecting the Defined Neighborhood.
- DN should align or fall within Targeted Area of any existing revitalization strategies

Size
- Not to be smaller than one census tract
- May not encompass the entire city or county in which the proposed site is to be located (except for when the city/county falls within one tract)
How: Community-Driven Strategies

- Transformation Team identifies population to be served: low-income families or seniors in Defined Neighborhood
- QAP Requirements for Citizen Outreach
  - Survey; or
  - Two public meetings (one of which may be meeting between Partners)
- Transformation Plan must include community data and input that
  - demonstrates the level to which the local population to be served currently accesses community resources (e.g., education, health services, employment, and transportation).
  - identifies the challenges the local population to be served face in accessing those community resources.
Transformation Plan Components

- For each prioritized challenge, the Transformation Team identifies at least one measurable goal for
  1. increasing future residents’ access to these resources and
  2. catalyzing improved access to such resources for the Defined Neighborhood as a whole.

- For each goal, the Community Transformation Plan names at least one solution to be implemented by one or more Transformation Partners.
2017-Funded Transformational Communities
Transformational Communities, in their own words:

“We are taking the vision outlined in the Trion Urban Redevelopment Plan and putting that priority into action.”
– Breakers at Trion (Senior Property), Trion, GA

“The CTP takes this work a step furthering by using a process of engaging the public and the stakeholders in this area to craft real-world strategies that can be undertaken by the community to further all of the plans' goals, without relying on the government to need to make changes to existing policies or ordinances to accomplish those goals.”
– MainStreet Walton Mill (Senior Property), Monroe, GA

“...All of our elected officials, community leaders, and Transformation Partners have caught the “transformation vision” and are all on board to help improve the lives of the residents in the Defined Neighborhood. Between the new housing being built and planned at Tindall Fields, and the Transformation Plan, we have a real catalyst for change.”
– Tindall Fields Phase 2 (Family Property), Macon, GA
Snapshot: 18 funded Transformational Communities

- **Tenancy & Pool**
  - 6 Rural, 12 Flex
  - 9 Senior, 9 Family

<table>
<thead>
<tr>
<th></th>
<th>Rural</th>
<th>Flexible</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Family</td>
<td>1</td>
<td>8</td>
<td>9</td>
</tr>
<tr>
<td>Senior</td>
<td>5</td>
<td>4</td>
<td>9</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>6</td>
<td>12</td>
<td></td>
</tr>
</tbody>
</table>

- Placed-in-service dates range from 4/1/19 to 12/31/19
Building on Revitalization for Transformation

- 16 of 18 communities built on at least one existing revitalization strategy
  - 9 communities cited a Urban Redevelopment Plan
  - 3 communities cited a TAD/CID Master Plan
  - 2 communities cited a corridor-specific plan
- 2 communities w/o an existing revitalization strategy: the Community Transformation Plan represented their first ever concerted community revitalization plan
Building Capacity for Community Strategies

Grove Gardens: Terry Mill Community (Atlanta, GA)

• “Despite its historic disadvantages and pending opportunities for redevelopment, the Terry Mill Community has not benefited from a concerted Community Revitalization Plan led by the local government…

• “As the first ever strategic planning document for the Terry Mill community, it was important to ensure that the Plan was highly influenced by the priorities articulated by the community, but also consistent with the strengths and capabilities of The Grove CDC, which will be charged with leading implementation of the Plan.”

Chandler Trace: Hartwell, GA

• Res. No. 2017-03-04, Support for Transformational Plan: “Resolved to designate the Defined Neighborhood in an area defined by itself, to create a community-based team with the owner (of Chandler Trace) to develop a Community Transformation Plan for the coordination and provision of local services and resources to those most in need in the Defined Neighborhood, and determined the request for affordable housing for older persons and the creation of a Community Transformation Plan to be in the best interest of the citizens of the City.”

• Motion carried unanimously, 6-0.
Community-Based Developer

- 11 affordable housing developers qualified as a Community-Based Developer (3 Rural, 8 Flexible)

<table>
<thead>
<tr>
<th>Qualification (multiple allowed)</th>
<th>Total</th>
<th>Rural</th>
<th>Flexible</th>
</tr>
</thead>
<tbody>
<tr>
<td>Participated/led philanthropic activities benefitting community</td>
<td>10</td>
<td>3</td>
<td>7</td>
</tr>
<tr>
<td>Selected by Local Government through RFP</td>
<td>7</td>
<td>3*</td>
<td>4</td>
</tr>
<tr>
<td>Partnerships w/ 2+ community nonprofits</td>
<td>7</td>
<td>2</td>
<td>5</td>
</tr>
<tr>
<td>HOME consent &amp; designated as CHDO</td>
<td>2</td>
<td>0</td>
<td>2</td>
</tr>
</tbody>
</table>

- High level of engagement among local governments in Rural areas
  - *doesn’t include Chandler Trace (Hartwell), which passed a resolution in favor of the plan and the specific developer
Community Quarterbacks (CQBs)

- 17 Applicants—all but one—partnered with a Community Quarterback.
- Two Applicants each partnered with two organizations as co-Community Quarterbacks.
Across the board, majority of CQBs are nonprofits

<table>
<thead>
<tr>
<th>Nonprofit CQBs</th>
<th>Nonprofit CQB Types</th>
<th>CQBs</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>Health</td>
<td>Piedmont Columbus Regional, Healthy Savannah, Phoenix Health Center</td>
</tr>
<tr>
<td>1</td>
<td>Human Services</td>
<td>Family Promise of Hall County</td>
</tr>
<tr>
<td>8</td>
<td>Public-Society Benefit</td>
<td>Westside Future Fund, Houston Co. Family Connection, Community Action for Improvement, Greater Piney Grove Community Development, Inc., Chattooga Chamber Foundation, United Way of Central Georgia, United Way of Hall County, Truth Spring, Inc.</td>
</tr>
<tr>
<td>2</td>
<td>Religious</td>
<td>MUST Ministries, Faith In Serving Humanity (FISH)</td>
</tr>
</tbody>
</table>
But most Local Government CQBs are in Rural Pool

Though 12 of the 18 Applicants were Flexible Pool, 4 of the 5 local government CQBs were from the Rural Pool.

<table>
<thead>
<tr>
<th>Local Government CQBs</th>
<th>Nonprofit CQB Types</th>
<th>CQBs</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>City Manager</td>
<td>City of Lafayette, City of Hartwell</td>
</tr>
<tr>
<td>2</td>
<td>Downtown Development Authority</td>
<td>Monroe DDA, Fort Valley Main Street/DDA</td>
</tr>
<tr>
<td>1</td>
<td>Local Government Department</td>
<td>Augusta Housing and Community Development</td>
</tr>
</tbody>
</table>

5 of 17
Community Engagement & Outreach

- Despite a short time frame before Application, many communities reported high levels of engagement among Transformation Partners.

- 14 communities disseminated a survey to low-income Defined Neighborhood residents, reaching a total of 1,571 people.
  - Average number of respondents per survey = 112
  - Common questions included:
    - Demographic questions about the respondent and family
    - Obstacles preventing respondent from accessing education, employment, transportation, and health services
    - Community amenities and cohesion
## Community-Identified Challenges

<table>
<thead>
<tr>
<th>Transformation Partners</th>
<th>Number of Communities w/ these Partners</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local Health Provider</td>
<td>16</td>
</tr>
<tr>
<td>Transportation Services Provider</td>
<td>10</td>
</tr>
<tr>
<td>Employment Services Provider</td>
<td>5</td>
</tr>
<tr>
<td>Local K-12 School District Representative</td>
<td>9</td>
</tr>
<tr>
<td>Other</td>
<td>9</td>
</tr>
</tbody>
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<table>
<thead>
<tr>
<th>Challenges</th>
<th>Number of Communities Identifying these Challenges</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health</td>
<td>16</td>
</tr>
<tr>
<td>Housing</td>
<td>15</td>
</tr>
<tr>
<td>Transportation</td>
<td>12</td>
</tr>
<tr>
<td>Employment</td>
<td>9</td>
</tr>
<tr>
<td>Education</td>
<td>9</td>
</tr>
<tr>
<td>Other</td>
<td>6</td>
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“Other” included:
- Development Authority
- Police/Sheriff Department
- GICH Team
- University/Technical College
- Housing Authority

“Other” included:
- Safety
- Community disinvestment
- Partnership coordination/Resident awareness of resources
- Community fellowship/isolation
All committed to housing as platform for community health

- All 18 Developers agreed to provide to residents:
  - On-site preventative health screenings at least monthly, at minimal or no cost
  - Health and wellness education

- Health programming may also include
  - Community gardens and mobile vending of fresh foods
  - Nutrition education
Community Transformation Plans
Catalyze Public and Private Investment
Private Investment: Community Improvement Fund

All 18 communities secured a commitment of at least $50,000 to support Community Transformation Plan goals

9 Family properties at $50,000 each totaled $450,000 for residents’ education:
- Monthly reading events
- Fund for residents’ education expenses
- Supplies, transportation, salaries for after-school and summer programming
- Tutoring
- Direct support to two local school districts
  - “Leader in Me” at Ingram Pye Elementary School
  - STEM programming at Walker County School District

9 Senior properties totaled $460,000 for achieving CTP goals and services, including
- Establishing community garden
- Resource guide of community services
- Senior transportation
- Community development goals, such as blight removal

With the exception of the Griffith Family Foundation (Macon, GA), all donations came from the Developer Project Team itself.
Third-Party Capital Investment

- Eligible investors
  - Unrelated third party (foundation, business, local government)
  - Local funding mechanism dedicated by local government

- Eligible uses:
  - Development of parks, green space, shared amenities, recreational facilities, and/or
  - The completion of a targeted, place-based component of a Community Revitalization Plan/Community Transformation Plan

- Within 0.5 miles of proposed housing site
11 communities reported third-party investment, totaling $38,649,988

Only 4 communities reported this investment occurring before Application Submission → over 70% of investment will occur in conjunction with proposed development

<table>
<thead>
<tr>
<th>Pool</th>
<th>Communities w/ Third-Party Investment</th>
<th>Total Investment</th>
<th>Average Investment</th>
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<tbody>
<tr>
<td>Rural</td>
<td>4</td>
<td>$5,636,223</td>
<td>$1,409,056</td>
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<tr>
<td>Flex</td>
<td>9</td>
<td>$33,013,765</td>
<td>$3,668,196.1</td>
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<table>
<thead>
<tr>
<th>Pool</th>
<th>Rural Communities</th>
<th>Flex Communities</th>
<th>Total Investment</th>
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<tbody>
<tr>
<td>Local Government</td>
<td>4</td>
<td>7</td>
<td>$33,042,545</td>
</tr>
<tr>
<td>Foundation</td>
<td>1 (reported both)</td>
<td>2</td>
<td>$5,607,443</td>
</tr>
<tr>
<td>Total</td>
<td>4</td>
<td>9</td>
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From The East Savannah Gateway Transformation Plan:

The core objectives of the planning and implementation processes include:

- To create guiding strategies to a “Neighborhood by Design” that presents viable solutions to:
  - **Improve access to recreation and open spaces**;
  - **Increase access to healthy foods and quality medical services**;
  - **Enhance public transit and safe, active transportation**;
  - **Develop quality, affordable housing**;
  - **Provide economic opportunity**;
  - **Improve school performance and quality of childcare**;
  - **Ensure safe neighborhoods with adequate public spaces for social interaction**;
  - **Enhance environmental quality, i.e. air and water quality, and noise reduction**;
  - **Implement green and sustainable development and practices**.
Community Transformation Plan For Health + Wellness in East Savannah
Community Transformation Plan For Health + Wellness in East Savannah

Community Quarterback

Transformation Partners
We will lead and support healthy lifestyles in Savannah by:
• Creating an environment that makes a healthy choice an easy choice
• Building a collaborative network that identifies and shares resources
• Collecting and disseminating information
• Promoting best practices and supporting innovative programs, and advocating for effective policies

www.healthysavannah.org
Launched in 2007 by Savannah Mayor Otis with the aim of making Savannah a healthier place to live. Major successes include:

- Breath Easy Savannah campaign to pass Savannah’s Smoke Free Air Act of 2010
- Adoption of a Complete Streets Policy by the City of Savannah
- Consistent voice for policies that make “the healthy choice the easy choice.”

www.healthysavannah.org
Plan Development Process
Community Assets

Active Neighborhood Associations
And Community Center

Farm Truck 912
Forsyth Farmer’s Market
Community Assets

Use of City-owned land for gardens

Savannah community gardens

Provides Bikes to Partner Organizations

SAVANNAH BICYCLE CAMPAIGN
BICYCLECAMPAIGN.ORG

CAT
CHATHAM AREA TRANSIT
The Cove at Dundee
(Tiny House Project for Homeless Veterans)

72 Tiny Homes

The land for the 72 Tiny Houses has been located at 75 Dundee Street. The development will provide electricity, running water, and trash removal.

Pride & Security

The village will function as a community with three Clubhouses that allow for residents to meet and share meals, as well as offering space for services such as AA meetings, nutrition and health classes, and individual meetings with support personnel and case managers.
Canyon Ranch Institute catalyzes the possibility of optimal health for all people by translating the best practices of health literacy and integrative health with our partners to help educate, inspire, and empower every person to prevent disease and embrace a life of wellness.

Learn More

Saturday gardening sessions give empowerment, solace – and spring produce

by Sue Fedora

Savannah Morning News

Institute, Morris announce Savannah health initiative
Community Survey

- If there was a community garden in your neighborhood, would you grow your own food there?
  - Over 85% of responses indicated ‘yes’ (43%) or ‘maybe’ (43%).

- Would you be interested in learning more about how to grow food?
  - 75% of responses indicated ‘yes’ (46%) or ‘maybe’ (29%)

- If there was a community garden in your neighborhood, would you be willing to help maintain it?
  - Almost 80% of responses indicated ‘yes’ (54%) or ‘maybe’ (25%).
Keys to Success

- Build on Existing Plans
  - Comp Plan
  - Choice Neighborhood

- Recognize Assets
  - Non-profits
  - Local gov’t
  - Infrastructure

- Support What Works
  - Healthy Savannah
Questions?

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