NCSHA 2016 Annual Awards Entry Form

(Complete one form for each entry)

Deadline: Wednesday, June 15, 2016

Visit ncsha.org/awards to view the Annual Awards Call for Entries.

<u>Instructions:</u> Type entry information into the form and save it as a PDF. Do not write on or scan the form. If you have any questions contact awards@ncsha.org or 202-624-7710.

| Fill out the entry name <i>exactly</i> as you want it listed in the program. |
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|--|

Entry Name:

| HFA: | | | |
|------|--|--|--|
| | | | |

 Submission Contact:
 (Must be HFA Staff Member)______
 Email:

Please provide a 15-word (maximum) description of your nomination to appear on the NCSHA website.

Use this header on the upper right corner of each page:

| HFA: | |
|-------------|--|
| Entry Name: | |

Select the appropriate subcategory of your entry and indicate if you are providing visual aids.

| Communications | Homeownership | Legislative Advocacy | Management Innovation |
|---------------------------------------|---|----------------------|--------------------------------|
| Annual Report | Empowering New Buyers | Federal Advocacy | Financial |
| Creative Media | Encouraging New Production | State Advocacy | Human Resources |
| Promotional Materials and Newsletters | Home Improvement and | | Operations |
| | Rehabilitation | | Technology |
| Rental Housing | Special Needs Housing | Special Achievement | Are you providing visual aids? |
| Encouraging New Production | Combating Homelessness | Special Achievement | Yes |
| | | | |
| Multifamily Management | Housing for Persons with Special Needs | | No |



Trickle-Down Effect – Introduction

For nearly a year, the Indiana Housing and Community Development Authority ("IHCDA") embraced an opportunity to build a unique and noteworthy working group that has proven to advance the strategic objectives and overall mission of the agency. IHCDA and key stakeholders leveraged knowledge gained through this working group to creatively make housing and community development policy a priority in Indiana. While embracing this challenge, IHCDA created a formidable coalition, helped to develop a solution-driven strategy to research, and produced an inaugural housing policy event, along with passing Senate Bill 325 ("SB 325").

Building Strange Bedfellows – Indiana Housing and Community Development Coalition

Toward the end of the 2015 meeting of the Indiana General Assembly ("Session"), it became evident that a few advocacy organizations were seemingly misinformed and disconnected from IHCDA policy positions. Rather than addressing these issues individually, IHCDA seized the opportunity to develop a much broader working group of advocates and experts that are connected to housing and community development in Indiana. After receiving strong support and encouragement from several organizations, IHCDA formally organized the oracle of advocates and industry experts dubbing it the Indiana Housing and Community Development Coalition ("Coalition").

The initial Coalition gathering was held on July 23, 2015. The key objective and short-term goal to simply educate the group on IHCDA's procedures, policies, and positions quickly transformed into a long-term goal of collaborating with a unified voice when it comes to specific policy issues surrounding housing and community development. After setting the long-term goal, the Coalition decided on how often to meet and scheduled the next two meetings along with confirming the best approach for communicating, which was the creation of a repository to share position papers and talking points. The Coalition determined there is a gap or lack of market research on specific topics in Indiana as well as endorsing a housing and community development policy event. The Coalition not only decided to support the event, they acted as the event's partners and executive advisory committee.

Culmination of Collaboration - Indiana Housing Policy Summit ("Summit")

Although housing is one of the leading drivers of Indiana's economy, representing approximately 18% of Indiana's GDP, and a crucial component of comprehensive community development, it is often absent in the larger debate over economic policies and long-term community stability and prosperity. Acting as the executive advisory committee, the Coalition took charge in developing and providing a unique event to focus on higher level policy discussions, problem solving, and the sharing of ideas with influential Hoosiers on an issue that is vital to the Indiana economy. By encouraging dialogue around critical housing and community development issues among practitioners, policy makers, and the communities they serve proved to be a positive step toward long-term solutions to community stability and prosperity.

On Friday, December 11, 2015, more than 100 attendees crowded into the Grand Hall Ballroom within the Historic Union Station at Crowne Plaza in Indianapolis, IN for the one-day inaugural event. The attendees included realtors, developers and builders, title insurers, local housing officials, elected officials, grassroots activists, financial services industry, closing attorneys and many others. The content of the event was developed by more than 15 partners and members of the executive advisory committee, representing a broad cross-section of housing related professionals.

The Summit began with opening remarks by Lieutenant Governor Sue Ellspermann followed by a discussion about the state of Indiana housing moderated by Scott Olson, a real estate reporter for the Indianapolis Business Journal. John Franklin Hay, Near East Area Renewal ("NEAR"), Jacob Sipe, IHCDA, George Tikijian, Tikijian & Associates, and Rick Wajda, Indiana Builders Association ("IBA"), conversed on multiple issues including Indiana's housing priorities, millennials and homeownership, vacant and abandoned homes, property tax caps, as well as other challenges and opportunities in Indiana's housing market.

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During the luncheon plenary session, attendees heard from Abdul-Hakim Shabazz, radio talk show host on WIBC and political commentator for RTV 6, to update attendees on issues of interest during the upcoming meeting of the Indiana General Assembly prior to moderating a legislative panel. Jeff Whiting, City Real Estate Advisors, provided federal updates, David Jamison, Iowa Finance Authority, inserted an outside perspective and discussed Iowa's upcoming Presidential Caucus while Rick Wajda, IBA, and Kathleen Taylor, Indiana Association for Community Economic Development, added to the discussions on the federal budget, property tax reforms, tax sales, disparate impact, among other topics.

In addition to popular workshops regarding the Indiana qualified allocation plan, blight elimination, and homeownership, attendees engaged in spirited dialogue about the consolidated plan, moving forward program, data-driven policy, healthy homes and fair housing. The afternoon plenary revealed the results and next steps for two of the largest challenges facing Indiana, mental health issues and housing, after spending the day using the "Simplex process" to problem solve a better understanding between the two. At closing, attendees enjoyed networking with peers during a lively reception featuring a local musician, Brett Wiscons.

The Inaugural Indiana Housing Policy Summit exceeded expectations with 94 persons pre-registered and 39 onsite registrations totaling 133. Officially, there were 110 persons in attendance throughout the day, providing very positive feedback. The attendees were extremely satisfied with the food and the venue and, most importantly, they felt that the sessions were varied, informative and just the right amount of time. Additionally, the majority stated that the event is a great opportunity to identify barriers and develop solutions while a strong majority are willing to attend the event again and recommend others to attend.

Solution-Driven Strategy – Hoosier Housing Now

After the initial meeting, the Coalition continued to meet the remainder of the year (August 27, September 4, November 20, and December 11) leading up to the 2016 Session. In addition to developing and executing the Summit, they also highlighted the lack of industry research. IHCDA Research & Innovation team met with the Coalition to discuss their proposed housing report. Deriving out of those discussions the Research & Innovation team took a different direction rather than a full housing report.

In a fast-paced world, many professionals neither have the time or the inclination to read long reports. In response to changes in how people consume information, IHCDA began releasing a series of short fact sheets, entitled **Hoosier Housing Now**. These fact sheets provide Indiana-specific housing and community development data necessary to fully address housing affordability needs in Indiana.

The first issue debuted on January 12, 2016 and focused on household incomes of Indiana homeowners and renters. IHCDA has recently released Issue #11, Homeownership at Very Low Income Levels, and plans on releasing at least five more by the end of the year. Hoosier Housing Now has been very well received and the Coalition along with the conversations at the Summit, led to this new initiative approach to research.

Curbing the Complications – Senate Bill 325, Individual Development Accounts ("IDA")

Another major accomplishment resulting from the Coalition's willingness to work collaboratively in building consensus on specific housing issues, the group advanced Senate Bill 325 during the 2016 Legislative Session. Not only was the introduced version of SB 325 not altered throughout the entire legislative process, it did not receive one vote opposing the bill. This has much to do with the strong alliance and support from the Coalition.

Description: Indiana's IDA program was established in 1997 via state legislation, making it one of the first largescale asset demonstrations in the country. The objective of the IDA program is to assist people with limited means in achieving financial independence and becoming self-sufficient by providing them the skills to develop a budget and set goals, establish regular savings habits, and invest in assets.

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Indiana takes advantage of the opportunity to receive Federal money from the US Department of Health and Human Services ("HHS") for our IDA program through the Assets for Independence ("AFI") Act. IHCDA is required to match all Federal monies with State monies on a dollar-for-dollar basis.

Qualified participants set savings goals and make regular savings deposits. Every dollar they save is matched, at a minimum, \$3 for every \$1 saved, to help them reach their asset-building goals which are limited to launching a new business, furthering their education, or purchasing a new home.

Background: On December 4, 2015, representatives from HHS reached out to IHCDA informing us they were making a clarification to the Grandfather Clause of the AFI Act that would expand participant's eligible assetbuilding goals to include owner-occupied home rehabilitation and home principle payments in Indiana. IHCDA immediately reached out to our Indiana Housing Policy Summit partners and the executive advisory committee to discuss the decision and an opportunity to clarify and expand Indiana's State Code dealing with IDAs.

Within two business days, we had representatives from the Indiana Association for Community Economic Development ("IACED"), Indiana Association of United Ways ("IAUW"), Indiana Community Action Association ("INCAA"), and Indiana Institute for Working Families ("IIWF") at IHCDA offices considering IDA specific legislation. Since a legislator wanting a bill drawn up for the 2016 Legislative Session had to submit a request by December 10, 2015 to the Office of Bill Drafting and Research of the Indiana Legislative Services Agency, there was a time crunch. With support of the group, Kathleen Taylor, Convener and Policy Director, IACED, took the lead by reaching out to Senator Mark Messmer (R-District 48) who championed the bill and was able to put in the request to create SB 325.

Legislation and Process: The introduced bill made several technical corrections and several important updates, including requiring that qualifying participants be Indiana residents and allowing participants to purchase vehicles with their savings. The bill also requires that when participants purchase a primary residence or business that it must be located or based in Indiana and the bill increases eligibility from 175% to 200% of the federal poverty level.

Several members of the Coalition testified in support of the bill at every committee hearing, helping to garner the active and passionate support of nearly 10 authors and sponsors in the Indiana General Assembly and achieving unanimous support throughout the legislative process. The collaborative efforts of the Coalition along with establishing immediate policymaking priorities were paramount to the unlikely and vast support for this bill. The Coalition will continue to be utilized by IHCDA to assist with our strategic objectives and long-term policy initiatives.

Welcome to the Future – Conclusion

Within a year of the first meeting of the Coalition, the working group has accomplished huge steps in cutting communication red tape, prioritizing research needs, passing SB 325, and hosting a first-of-its-kind event in Indiana. The success of the Inaugural Indiana Housing Policy Summit and the passage of SB 325 would have been nearly impossible to accomplish without IHCDA recognizing and grasping opportunities to utilize available resources to discover the problem and constructing the robust Coalition. With the legislative success of SB 325 and the Summit, the Coalition is already collaborating for this year's Summit and to also establish an Indiana housing first program, to provide housing support services to eligible homeless persons, along with other important housing measures in 2016 and beyond.





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Appendix A

Members of the Housing and Community Development Coalition. The bipartisan Coalition consists of roughly 20 advocates and lobbying groups representing a wide-array of stakeholders.

- Association of Indiana Counties
- Coalition for Homelessness Intervention & Prevention
- Corporation for Supportive Housing
- Habitat for Humanity of Indiana
- Lieutenant Governor's Office
- Indiana Affordable Housing Council
- Indiana Apartment Association
- Indiana Association of Cities and Towns
- Indiana Association of Community Economic Development
- Indiana Association of Realtors
- Indiana Association of United Ways
- Indiana Bankers Association
- Indiana Builders Association
- Indiana Community Action Association
- Indiana Credit Union League
- Indiana Institute for Working Families
- Indiana Landmarks
- Indiana Mortgage Bankers Association
- Mental Health of America Indiana
- Metropolitan Indianapolis Board of Realtors
- National Alliance on Mental Illness Indiana



Above is the graphic developed for the Coalition.



Appendix **B**

Website, marketing materials and photos from the Inaugural Indiana Housing Policy Summit held on December 11, 2015.

Website (www.in.gov/myihcda/IndianaHousingPolicySummit.htm)



Click here to register. (The password is: summit).

Contact

If you have any questions, comments, or would like additional information about the Inaugural Indiana Housing Policy Summit, contact Zachary Rice, Legislative Affairs and Policy Director at 317-232-0624 or <u>zrice@ihcda.in.gov</u>

Logo



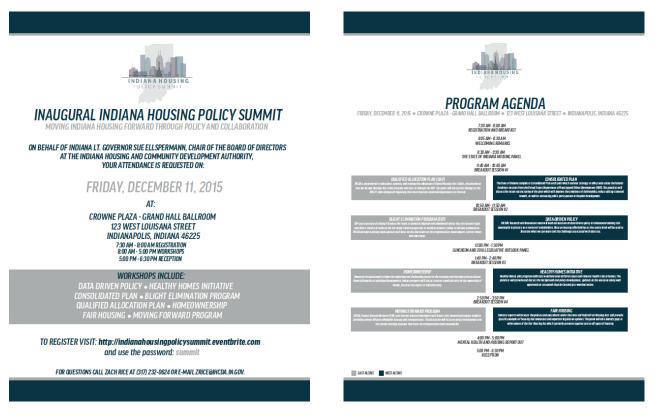


Indiana Housing and Community Development Authority

Entry Name: Making Housing and Community Development Policy a Priority Category: Legislative Advocacy – Subcategory: State Advocacy

Invitation

Agenda





Indiana Housing and Community Development Authority Entry Name: Making Housing and Community Development Policy a Priority Category: Legislative Advocacy – Subcategory: State Advocacy

Photos



Lt. Governor Sue Ellspermann provides opening remarks at the Inaugural Indiana Housing Policy Summit.



Rebecca Nannery with IHCDA's Research and Innovation Department Introduces Hoosier Housing NOW at the Inaugural Indiana Housing. Policy Summit.



IHCDA Executive Director Jacob Sipe provides greetings.



IHCDA Deputy Executive Director and Chief Legal Counsel Mark Wuellner provides a "report out" on the Simplex Training conducted During the Inaugural Indiana Housing Conference.



Appendix C

An example of the IHCDA Special Info which is the platform for sending Hoosier Housing NOW. This bulletin, sent through GovDelivery, is distributed to our list serve of more than 4,000 people and posted on Facebook.

Hoosier Housing Now Issue #10



Note: In addition to each Hoosier Housing NOW being sent through GovDelivery and posted on Facebook, a .pdf version is housed on the IHCDA Partner Portal: http://www.in.gov/myihcda/2544.htm



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Appendix D

SB 325: INDIVIDUAL DEVELOPMENT ACCOUNTS (Messmer, M) - Requires that a primary residence or business for which money is withdrawn from an individual development account (account) must be located or based in Indiana. Provides for use of money from an account for purchase of a motor vehicle. Increases from 175% to 200% of the federal income poverty level the maximum annual income that an individual may have to qualify for an account. Requires a qualifying individual to be an Indiana resident. Removes the deadline for deposits to accounts. Provides that a community development corporation may apply to the housing and community development authority for an allocation of tax credits for contributors to an individual development account fund. Prohibits application of fees to an account. Allows a community development corporation to approve a business plan before receiving the plan with a request for a withdrawal for use in connection with a business. Codifies current practices for allocation and claims of individual development account tax credits.

03/21/2016 SIGNED BY GOVERNOR

| 03/14/2016 | Signed by the President of the Senate |
|------------|---|
| 03/02/2016 | Signed by the Speaker |
| 02/29/2016 | Signed by the President Pro Tempore |
| 02/23/2016 | Third reading passed; Roll Call 232: yeas 100, nays 0 |
| 02/22/2016 | Second reading ordered engrossed |
| 02/18/2016 | Representative Bacon added as cosponsor |
| 02/18/2016 | Committee Report do pass, adopted |
| 02/17/2016 | DO PASS Yeas: 8; Nays: 0 |
| 02/09/2016 | Referred to Family, Children and Human Affairs |
| 02/09/2016 | First Reading |
| 02/02/2016 | Referred to House |
| 02/01/2016 | Senator Randolph added as coauthor |
| 02/01/2016 | Representatives Clere and Wright added as cosponsors |
| 02/01/2016 | Representative Truitt added as sponsor |
| 02/01/2016 | Third reading passed; Roll Call 107: yeas 50, nays 0 |
| 01/28/2016 | Second reading ordered engrossed |
| 01/25/2016 | Committee Report do pass, adopted |
| 01/21/2016 | DO PASS Yeas: 6; Nays: 0 |
| 01/12/2016 | Senator Breaux added as coauthor |
| 01/11/2016 | Senator Kruse added as second author |
| 01/07/2016 | Referred to Family & Children Services |
| 01/07/2016 | First Reading |
| 01/07/2016 | Authored By Mark Messmer |