



## Entry Form 2018 Annual Awards for Program Excellence

**Entry Deadline: Friday, June 15, 2018, Midnight ET**

Each entry must include a completed entry form. Please complete a form for each entry your HFA is submitting. The completed entry form will become the first page of your entry.

This form is a fillable PDF. Type your information into the entry form and save it as a PDF. Please do not write on or scan the entry form. **Questions: Call 202-624-7710 or email [awards@ncsha.org](mailto:awards@ncsha.org).**

**Entry Title:** Enter your entry's title exactly as you wish it to be published on the NCSHA website and in the awards program.

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**Category:**

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**Subcategory:**

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**Entry Summary:** A 15-word (max) summary of the program, project, or practice you are entering.

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**HFA:**

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**HFA Staff Contact:**

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**Phone:**

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**Email:**

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**Visual Aids:**

Are you mailing to NCSHA 10 copies of any visual aids that cannot be included in your entry PDF?    Yes        No

**Payment:**

My HFA is mailing a check to NCSHA.  
My HFA is emailing the credit card authorization form to [awards@ncsha.org](mailto:awards@ncsha.org).

## **Leveraging Partnerships for Effective Federal Advocacy**

### ***Making the Case for HR1661***

North Carolina has the highest percentage of Affordable Housing Credit Improvement Act (HR1661) sponsors in the House of Representatives. The 12 out of 13 (92%) represent important members across the entire political spectrum, including the:

- Chair of the Freedom Caucus
- Former Chair of the Congressional Black Caucus
- Ranking Member of the THUD Appropriations Committee
- Deputy Whip for the Majority
- Chair of the Republican Study Committee
- Majority-party member of the Ways and Means Committee.

This outcome was the result of a well-designed, coordinated, and targeted advocacy campaign. To win support vital to the bill's passage, the North Carolina Housing Finance Agency launched a robust advocacy campaign in 2017 involving vigorous support from industry partners, targeted visits with members of Congress or their staff in Washington, DC, or their districts, as well as direct promotion of Housing Credit properties to members of Congress through tours and events. The methodology and results can be replicated in other states.

#### ***Background***

Like the rest of the nation, North Carolina has been in the grips of an affordable housing crisis for the past several years. A 2017 UNC-Chapel Hill report revealed that more than a quarter of the state's rental households experienced severe cost burdens, were overcrowded, or lacked critical facilities. For 30 years, the Low-Income Housing Tax Credit had played a strong role addressing unmet needs in North Carolina and nationwide, but for it to keep up with growing demands, it needed to be modernized and expanded. Enter the Affordable Housing Credit Improvement Act (HR 1661).

HR 1661 is bipartisan legislation that, if passed, would make the Housing Credit more flexible, simplify program requirements, support preservation, and enable development in challenging markets.

#### ***Crafting the Message***

In early 2017, the NC Housing Finance Agency executive director and Board of Directors directed staff to launch a campaign to cultivate sponsorships for HR1661 among the North Carolina delegation. This campaign had the dual goal of building support for the Housing Credit itself in anticipation of federal tax reform. When the Agency initiated the campaign, none of the state's congressional representatives had already signed on to HR 1661; our goal was to secure the sponsorship of 5 Members.

We knew we needed to craft a message that would hone in on the economic impact of the Housing Credit that would resonate with our delegation. We emphasized that development of nearly 94,000 Housing Credit apartments in the state had supported 138,000 jobs and generated \$926 million in state and local tax revenues. By including research that showed the positive impact of housing stability on

health and education outcomes, we were able to highlight the numerous cost savings for federal, state, and local governments resulting from Housing Credit investments.

In the second year of the campaign, we refined our message to underscore that while the Housing Credit is our nation's most critical tool for the production and preservation of affordable housing, the reduction of the corporate tax rate from 35 to 21 percent in the Tax Cuts and Jobs Act of 2017 has reduced Credit pricing, resulting in decreased overall production. Our messaging made the case that enacting the Affordable Housing Credit Improvement Act, including the 50 percent increase in Housing Credit allocation authority, would make up for this lost production and further strengthen this already successful program.

Possessing a message that would resonate with lawmakers, our next step was to deploy it.

### ***Sharing the Message***

The Agency assembled a strong arsenal of campaign partners including longtime allies such as the North Carolina Home Builders Association, North Carolina Bankers Association, North Carolina Association of Realtors® and the North Carolina Housing Coalition. In addition, the Agency recruited new partners, including advocacy groups for seniors, children and people with disabilities, and health organizations concerned with social determinants.

We also urged our state's active network of developers and the Community Affordable Housing Equity Corporation (CAHEC), a nonprofit regional tax credit equity syndicator, to advocate for the legislation. During NCSHA's 2017 Legislative Conference in Washington, DC, our Agency teamed up with CAHEC to visit our congressional representatives, educate them on the Housing Credit and ask for their support of HR 1661. After these visits, both organizations maintained ongoing contact with congressional staff to keep the issue top of mind with our members.

These visits were closely followed by well-timed Capitol Hill visits from close partners—the NC Housing Coalition, the NC Bankers Association and the NC Association of Home Builders—who used coordinated talking points to advocate for the legislation.

Stating that he heard the same message from multiple constituencies, newly minted Congressman Ted Budd, a gun shop owner from rural North Carolina, was the first member of the delegation to sign on to the measure.

We followed our DC meetings with appointments in our districts back home, most notably with Congressman George Holding, a member of the Ways and Means Committee. The get-together included multiple partners, such as the NC Housing Coalition, CAHEC, the NC Bankers Association and several developers, and ultimately secured Congressman Holding's support.

Formal visits were one of the mainstays of the campaign, but partners also had success employing very targeted "nudges." For example, a local advocacy group for seniors was successful in soliciting a proclamation of support for the bill in a district of a member who was slow to sign on.

### ***Showcasing the Message***

Combined with the advocacy efforts of campaign partners, the Agency increased its ongoing efforts to get congressional members to property tours, groundbreaking, frame raisings, and ribbon cuttings of Housing Credit developments. We refreshed our event planning guide for partners, *Promote Your Property with a Well-Planned Event*, and helped them identify and execute events with members of Congress and their staff that highlight the impact of the Housing Credit on North Carolinians, surrounding communities, and the economy.

Events that got results included

- A hard hat tour of a textile mill conversion with Congressman Mark Walker: Staff for Congressman Walker, chair of the Republican Study Committee, cited the effectiveness of the district tours as a major factor in his decision to co-sponsor HR 1661.
- A hard hat tour of a furniture mill conversion with Congressman Ted Budd's staff.
- A ribbon-cutting with Congressman Walter Jones: Congressman Jones agreed to co-sponsor the legislation at this event.
- A ribbon-cutting with Congresswoman Adams that helped make the case for HR1661.
- A property tour with Congressman McHenry and his staff.

### ***Message Delivered and Successful***

All told, our campaign secured 12 sponsors for the Affordable Housing Credit Improvement Act. While much work remains to be done to advance the legislation, the campaign exceeded expectations and delivered a very high return on a modest investment in a legislative arena where every additional sponsor counts.

Our comprehensive, targeted, and well-coordinated campaign to secure sponsors for the Affordable Housing Credit Improvement Act provides a low-cost and easily replicable template for other states to use in their own advocacy efforts as well as a blueprint for future legislative advocacy campaigns.

One of the most important outcomes of the campaign was its impact on tax reform and the Omnibus. The groundwork laid during the first year of the coordinated effort to build support for HR 1661 was invaluable as the Agency and its partners sought to thwart threats to Housing Credits and Private Activity Bonds that arose throughout the tax reform process. The relationships forged with members and their staff, the education provided about the importance of the Housing Credit and the broadening and strengthening of the base of support for the Housing Credit within North Carolina paid handsome dividends, not only protecting Housing Credits and PABs in the final tax reform legislation, but helping housing programs to secure historic funding in the FY2018 Omnibus Spending Bill.

# LEVERAGING PARTNERSHIPS

for EFFECTIVE FEDERAL ADVOCACY



*THUD Ranking Member David E. Price helps dedicate Willow Creek Apartments in Cary.*



*Congressman Budd's staff tour Big Chair Lofts in Thomasville.*



*Congressman Jones dedicates Fair Grove Apartments in Snow Hill.*



*Congressman Walker attends a hard hat tour of Oneida Mill Lofts in Graham.*

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# Promote Your Property

With a Well-Planned Event

**Want to give your new development visibility and publicize the successful results of federal and state investments in affordable housing? A groundbreaking, frame-raising or ribbon-cutting can do just that!**

In addition to marketing your development, a well-planned event provides the perfect forum to thank stakeholders and solidify community and local government support. Let the North Carolina Housing Finance Agency assist you in showcasing your property, helping pave the way for your next development and ensuring the availability of both financing and community support for affordable housing.

## Let's Get Started



### Outline Your Event

The stage of development determines whether you are **holding a groundbreaking, frame raising or opening**. Don't rule out doing more than one event. The more you promote your property in your community and with elected officials, the better.

**Consider your optics.** Outline the size, scope and type of event you wish to hold. What will the weather be like during the month you choose? Check community calendars for competing events.

**Determine which elected officials you will invite and who may keynote the event.** Will guests and reporters be able to speak with residents and tour the property? If your budget allows, providing snacks or a meal can allow your guests to experience the sense of community that your residents will enjoy in their new homes.



### Choose the Date and Time

Sometimes the headlining speaker determines the date. If you want a member of Congress, a state legislator or the mayor to be your headliner, their schedule may determine event timing. Mondays and Fridays give elected officials the greatest flexibility. Set the date 30 days in advance to give ample time for planning.

**Contact major partners to discuss the date.** It takes dedicated partners to bring projects like these together and they, like us, will want to support your event and highlight their contributions. Reach out to us and other partners to ensure your event does not conflict with other commitments.

**Choose a time.** Late morning allows time for participants and attendees to arrive, flows into lunch and is not the hottest part of the day. It is also convenient for media, increasing the likelihood that your event may make the news. Avoid early mornings, evenings and weekends unless necessary.



## Take Care of Logistics

**Plan for refreshments.** Food will likely be determined by your budget and other resources, but plan on at least having bottled water. You may decide to hire a caterer to serve lunch, or simply arrange for staff to provide snacks and drinks.

**Reserve special items in advance.** Think about your event's layout. Will it be inside or outside? Where will the speakers stand? Where will the audience sit? You may need to rent a tent, a podium or chairs for guests. Determine any additional needs such as a stage, heaters or microphones.

**Ask key people to save the date.** Once you have coordinated a date with headliners and funding partners, ask other key people to save the date before you send out invitations and be sure to announce the date of the event on your social media.

**Start building the crowd and start building energy.** Consider how you will build a crowd, particularly if elected officials will attend. Your employees, your partners and their employees can boost the crowd. If you have a board, ask them to lobby elected officials and make announcements at other organizations.

**Don't forget to include your residents.** Not only can they add to your crowd and excitement, they provide an opportunity for lawmakers and partners to meet the people who benefit from affordable housing investments.



## Get the Invite Out

Decide who should be invited. Invite key federal, state and local elected officials. The NC Housing Finance Agency Community Outreach Representative can help identify officials. Invite partners and be sure to include program staff, directors and board. Local chamber of commerce executives, booster groups and neighborhood associations should be invited. You may also wish to invite other local dignitaries—the sheriff, police chief, fire chief, town council members—and local advocacy groups.

**Create invitations.** Electronic invitations are popular and can save time and money. Include date, time, the address and directions to the event, enclosing a map if possible. Note any confirmed headliner. For example, “Join Congressperson Doe in celebrating the Grand Opening of Manor Trace” and other speakers. Indicate if food will be served. If you mail invitations, print them yourself to save costs.

**Assign a staffer to be a point of contact.**

Invitations should list an email and phone contact for RSVPs. Ask an employee or volunteer to take over this duty and to follow up with elected officials to determine the VIP list.

**Send them out.** Use standard etiquette. Invitations to elected officials are addressed to “The Honorable John Doe.” The salutation should say “Dear Congressperson Doe” or “Dear Senator Doe.” Ideally, you should send your invites out 30 days prior to the event. If you mail them, use first-class postage.



## Location, Location, Location

**Finalize the event's location.** If the weather is not oppressive, outside is generally a good choice, but have a back-up plan in case of rain. Lobbies and common areas lend themselves to events. Consider the size of the event and what space will be appropriate. Always lean toward a smaller space, as it will make the number of guests appear greater.

**Consider the photo.** Think about background for speakers if photos are taken. Stage the event so that guests are looking at the property, or in a garden area facing a fountain or a playground, and place the podium so photos will include these backgrounds as well. Avoid backgrounds with highways, railroad tracks, unattractive structures and reflective surfaces, and consider how your photos will look on social media. Our Community Outreach Representative can assist in staging the speaking area and a group photo with our banner. Think about the position of the sun, and keep it at the back of the photographer.



## Plan the Program

**Determine the speakers.** Keep the ceremony brief. The formal program should last no more than 30 minutes. Keep in mind that each speaker takes an average of five minutes. Appoint someone to act as a “master of ceremonies” to make introductions and keep the program on schedule.

**Elected officials should be afforded the opportunity to speak.** Those unable to attend may send an aide to represent them and speak on their behalf. Work with their offices in advance to determine these details and plan accordingly. Representatives from the NC Housing Finance Agency and other funding partners should speak. You may choose to have a vetted resident share how their new home has impacted their lives.

**Determine the speaking order.** Typically, your emcee will begin with a welcome and brief remarks. At this point it is appropriate for the emcee to briefly recognize people that played an important role in the project but do not give remarks. This often includes partners such as architects, subcontractors and engineers and elected officials that opt not to speak. If you choose to have an invocation, then this would follow next. Your first speakers will include non-elected guests or partners which include finance partners, board members, etc. Next will be elected people who have been invited to speak, beginning with local, then state and then federal officials unless you have a keynote or headline speaker. The keynote or headliner will be the last person to speak, unless they request otherwise to accommodate their schedule.

**Be flexible.** Your program will be fluid. Elected officials may not know if they are available until just prior to the event. Leave room for last-minute changes.

**Always briefly recognize VIPs and special guests.** If elected officials are present but not speaking, recognize them and give them the opportunity to stand and wave. Staffers representing elected officials should be recognized as well, and may wish to read or present a letter from their member. Other people, such as the local Chamber of Commerce president, board members and other dignitaries may be recognized as well.



## Alert the Media

**Get help from the Agency.** The NC Housing Finance Agency can help you promote your event. Let our Community Outreach Representative know that you would like help and our Public Relations and Marketing staff can draft and issue a media advisory for you.

**Determine the media list.** The Agency has an extensive media list but if you have personal contacts at your local media outlets, please let us know so we can include them. If you are handling the media, remember to include all local newspapers and television stations. If your property is in a small town, include media from the closest major city.

**Issue a media advisory.** The advisory should include the location, date and time of your event, the schedule and speakers and should be emailed to reporters. Highlight human interest angles, or what makes your property different. If you have a big name speaking say so in the headline, the opening paragraph and the schedule. If residents will be available to speak to reporters, include that information.

**Social media.** Many reporters use Twitter and Facebook as a resource for stories, so send your event news directly to reporters. Begin promoting your event up to a month prior, with posts increasing as the event gets closer.

**Make follow-up calls.** Call the news assignment desk or reporters to check that they have received your advisory and reiterate why they should be interested in covering your event.

**Tip:**  
**Hold tours and  
other activities  
after the ceremony!**





## The Big Day

**Stage it.** Set up the podium and remember to be mindful of the background for pictures. Decide where speakers will sit based on their access to the podium. Arrange seating. Sometimes it is best to have fewer chairs than guests so that the crowd will appear bigger, but always consider the needs of elderly and disabled guests. Determine how tours, refreshments and the ceremony itself will be facilitated.

**Designate an onsite press contact.** Have someone available to greet the press, and designate an area with a good view of the ceremony for cameras to be set up. Ask reporters what they want to cover and do what you can to get reporters the interviews they need. Also, suggest interviews with your own leaders. Have someone available to answer technical questions about the property and financing. The more you help, the more likely the event will receive coverage.



## Final Thoughts

Even the best-planned events have surprises. Keep your cool and be flexible! For example, sometimes a speaker may not show up. Be gracious, make an excuse for them and move on with the program.

**After the program.** If you are having a ribbon-cutting or other ceremony at the end of the program, determine how to best transition into this activity. You also may want to set time aside for guests to tour the homes and amenities and let them know where to go for tours. If providing refreshments or food, make sure your guests know.

**Send thank you notes.** Be sure to send thank you notes to elected officials who attended your event. You should also send notes to any officials who were unable to attend to thank them for supporting your project and invite them for a future personal tour.



## Questions?

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