

## 2020 Housing Opportunity Grant - Level 3 Application

Status: Submitted

Date Submitted: 2020-07-13 08:50:55

Submitted By: egreenfield@rarealtors.com

Does the proposed activity adhere to the stated requirement? Yes

First Name: Lynn

Last Name: Bivens

Contact Title: Program Director

Contact Email: lbivens@rarealtors.com

Contact Phone: 8044225085

Association: RICHMOND ASSOCIATION OF REALTORS® INC

Association ID: 8475

Address 1: 8975 Three Chopt Road

Address 2:

City: Richmond

State: VA

Zip: 23229

Association AE First Name (if different from above): Laura

Association AE Last Name (if different from above):

Association AE Contact Email (if different from above): Llafayette@rarealtors.com

### Activity Details

Please check the box of the application deadline for which you are applying.: July 15

**NOTE: Associations cannot receive funding for activities previously supported by a Housing Opportunity grant (ex. recurring events such as housing expos or classes) Contact NAR staff at [HousingOpportunityGrants@realtors.org](mailto:HousingOpportunityGrants@realtors.org) if you questions about eligibility.**

Review the [frequently asked questions](#) and [Tip Sheet](#) before completing the application.

Amount Requested (Max \$10000): \$

1. Date of activity (or timeframe if an ongoing activity):

2. What type of activity are you planning?: Coalition initiative

:

3. Will the grant be funding a project in a rural community within your association's jurisdiction? Note that the Rural Housing Service defines "rural" as areas with less than 30,000 population and rural in character.: No

4. Describe the proposed activity including specific details about how the activity will be executed.: The Partnership for Housing Affordability (PHA) is a nonprofit affordable housing organization that is housed at the Richmond Association of REALTORS® and is led by RAR's Elizabeth Greenfield. PHA is overseeing the development of a regional Housing Resource Line (HRL), which will serve as a coordinated referral network for housing resources in the Richmond region. The HRL will be a phone-based access point to connect people with housing services, ranging from foreclosure prevention and elderly tax relief to locating stable rental housing and first-time mortgages. In April, PHA hired a contractor to oversee the development of the HRL, in partnership with PHA's Director of Implementation. The development phase of the project includes: (a.) Introducing the HRL to stakeholders, service providers and partners (completed); (b) Releasing a request for proposal to service providers for inclusion in the referral database (completed); (c) Identifying and procuring specialized software, equipment, and other administrative needs for the program (in progress); (d) Hiring and training two resource specialists (June-August 2020); and (e) Launching the HRL (September 2020). PHA anticipates that over 80% of HRL users will earn low and moderate incomes (at or below 80% of area median income). Its service area mirrors the local planning district's footprint, including the localities of Charles City, Chesterfield, Goochland, Hanover, Henrico, New Kent, Powhatan, Richmond, and the Town of Ashland. When operational, the HRL will provide a streamlined process

whereby users have one number to call that is answered by trained resource experts with current information to direct them to the correct agency based on their needs. This process is aimed at reducing confusion and saving users time, while also maximizing the resources of local service providers by decreasing unrelated calls, allowing them to focus on their specific services. The data compiled by the resource providers will be tracked using specialized software that will help the HRL determine the next steps to establishing a sustainable model. The information gathered at the conclusion of the pilot will also help quantify the greatest housing needs in each jurisdiction, helping to inform future housing strategies and decisions made by local governments and service providers.

**5. Why is the association interested in conducting the activity?:** According to the 2020 Richmond Regional Housing Framework (RRHF), housing information is scattered across many platforms, and sifting through these resources can be overwhelming for individuals who are looking for services that meet their needs. According to the Central Virginia Legal Aid Society's report, Achieving Coordinated Access 2020, residents say that it "may take three stops or tries to address your needs, as opposed to the ideal scenario where you speak to someone and say, 'Where do I go?'" The report describes that tenants often "call multiple numbers only to be referred to another organization that either refers them to yet another organization, find that the organization has no available funds, or that they are ineligible." RAR believes that the HRL will reduce the frustration that these residents experience by connecting them directly with the resources they need.

**6. What are the outcomes that the association expects to accomplish through this activity?:** RAR expects to achieve the following outcomes through this activity: (a) A permanent referral network exists for finding reliable housing information that meets the needs of Richmond area residents, especially those earning low and moderate incomes. (b) Demand for services is distributed more effectively across agencies by the resource specialists. (c) Service providers' intake systems see increased inquiries from qualified program candidates and spend less time is spent redirecting calls to other agencies. (d) HRL callers are referred to the resources they need quickly and efficiently, allowing them to resolve their housing issues faster and more effectively. (e) Data collected during the first year identifies the greatest housing needs in each jurisdiction, where those needs are located, and resource gaps to guide decisions made by local governments and service providers about future housing strategies.

**7. How will the association measure the success of the activity?:** RAR will use the following measures to track the activity's effectiveness: (a) PHA will provide a RAR with a report that will verify details about the launch of the HRL and its ongoing operation. (b) Data from the call tracking software will be used to establish: (1) the number of calls per month; (2) caller profiles, including income qualification, housing needs, geographic location; and (3) other factors that help to establish that the resources provided meet caller needs. (d) Resource providers will provide feedback during quarterly meetings that track the impact that the HRL is having on the workload of participating agencies, and the qualified nature of the calls they receive.

**8. How will this activity help the association achieve its housing advocacy goals?:** RAR's 2019-2020 Strategic Plan includes a goal to enhance RAR's position as a leading advocate for housing availability/affordability and community sustainability. In general, the HRL supports this goal because it: facilitates housing affordability by providing information about affordable housing directly to residents who need it; builds relationships within the nonprofit housing sector; and allows RAR to assist public officials with information/strategies for facing specific housing needs in their communities using the geographic data provided during the intake process. Specifically, a strategy in RAR's Strategic Plan recommends the continuation of its commitment to staff and coordinate the Partnership for Housing Affordability and its programs.

**9. How will REALTORS® be involved in the planning and implementation of the activity?:** Two REALTORS® sit on the board of the Partnership for Housing Affordability (PHA), which is housed and managed by RAR. These REALTORS® oversee the activities of PHA, including the implementation of this project. In addition, REALTORS® will be encouraged to refer their clients to the HRL, should they need technical information about purchasing an affordable home.

**10. How will association staff be involved in the planning and implementation of the activity?:** Laura Lafayette is Vice Chair for the Partnership for Housing Affordability, which is led by Elizabeth Greenfield, Vice President of Government Affairs for RAR. They are involved in the planning and implementation of the HRL pilot. In addition, RAR staff is deeply involved in preparing the physical space for the HRL, meeting its technical needs; and providing accounting services.

**11. List any organizations that will partner with your association in the activity. Describe their role(s) in the activity.:** Currently, service providers are responding to a request for proposal to be a resource for the HRL. PHA expects that more than 50 service providers will ultimately participate; currently the following 23 have committed: USDA, RURAL DEVELOPMENT Central Virginia Legal Aid Society George Hettrick Community Law Center Habitat for Humanity affiliates for Powhatan, Hanover and Richmond Henrico County agencies Maggie Walker Community Land Trust Commonwealth Catholic Charities Senior Connections Rebuilding Together Richmond Area Congregations Together in Service Capital Area Partnership Uplifting People Virginia Housing GoochlandCares Second Chance At Renewing Self (S.C.A.R.S) Housing Opportunities Made Equal of Virginia project:HOMES Powhatan County agencies

## Budget Details

12. Please provide your budget in the table below. If needed, provide additional details in response to question #13.

- REALTOR® association staff time/hours
- Fundraising contributions
- Money to hold a fundraiser
- General operating expenses
- Donations to an organization or person
- Cash prizes or payment for gifts and prizes
- Materials for the construction or rehab of a home/building
- Landscaping materials
- Home furnishings

**Note: Associations are encouraged to use the majority of grant funds for expenditures related to the development and implementation of an activity (such as research, speaker fees, marketing, printing, etc.) rather than venue and catering costs.**

### Revenue

|                                                                              |                 |
|------------------------------------------------------------------------------|-----------------|
| Housing Opportunity Program Grant<br>(enter requested amount)                | \$10,000        |
| Contribution from your association =<br>10% of grant request                 | \$1,000         |
| Contribution from other REALTOR®<br>association(s)                           | \$2,000         |
| Contribution from non-REALTOR®<br>collaborating partners                     | \$0             |
| Admission fee/tickets                                                        | \$0             |
| Revenue from sponsors (e.g., booth<br>rental, payment for advertising, etc.) | \$36,375        |
| In kind (rent/RAR)                                                           | \$6,000         |
| <b>Total</b>                                                                 | <b>\$55,375</b> |

**Expenditures**

|                                           |          |
|-------------------------------------------|----------|
| Consulting Fees                           | \$36,750 |
| Venue rental                              | \$0      |
| Catering/refreshments                     | \$0      |
| Marketing                                 | \$0      |
| Speaker fees                              | \$0      |
| Speaker expenses (travel, lodging, meals) | \$0      |
| Equipment/Supplies/Software               | \$9,500  |
| Printing/Copying                          | \$1,000  |
| Rent                                      | \$6,000  |
| Phone/Internet                            | \$2,075  |
| postage                                   | \$500    |
| Total                                     | \$55,825 |

**13. Additional Budget Information:** If applicable, use the space below to: provide explanations for "other" revenue or expenses noted above; provide an estimated number of attendees for activities with an admission fee; provide a breakdown of consulting fees; or provide details about in-kind contributions the association will make toward the activity.: Richmond Association of REALTORS has made a \$1,000 commitment to the HRL, and will provide \$6,000 in in-kind support by housing the HRL at RAR's offices. Virginia Realtors is supporting the HRL through a \$2,000 community engagement grant. The consultant who is overseeing the creation of the HRL is being paid \$5250/month for 7 months to complete the project, which includes: (1) Assessing the requirements of the project and creating a project & resource plan (completed); (2) Managing the implementation, including establishing the resource network of nonprofits; establishing operational processes and infrastructure; identifying data/technology needs, engaging stakeholders; creating a communications plan; establishing policies, etc. (ongoing through August) (3) Staying on at least 1 month post-launch to evaluate operations and address any needs. (September/October).

**14. For local associations:** The state association must be notified of this funding request. Provide the name and title of the person at the state association most familiar with the request.

First Name Association Contact: Lynne

Last Name Association Contact: Wherry

Association Staff Email: lwherry@virginiarealtors.org

**15. In reference to THIS activity, as described in question #4, has your association applied for funding from another NAR grant program including Smart Growth, Diversity, Placemaking, or Issues Mobilization?:** No

**16. If this funding request is approved, do you give NAR permission to share your application with others (either directly or on the REALTOR® Party website) as an example of a successful application?:** Yes

Please direct questions to: Wendy Penn 202-383-7504 [HousingOpportunityGrants@realtors.org](mailto:HousingOpportunityGrants@realtors.org)

## 2020 Housing Opportunity Grant - Level 3 Application

Status: Submitted

Date Submitted: 2020-07-02 09:17:16

Submitted By: connor@taar.com

Does the proposed activity adhere to the stated requirement? Yes

First Name: Connor

Last Name: Miller

Contact Title: Government Affairs Director

Contact Email: connor@taar.com

Contact Phone: 231-313-9027

Association: TRAVERSE AREA ASSOCIATION OF REALTORS®

Association ID: 4930

Address 1: 852 South Garfield Ave

Address 2:

City: Traverse City

State: MI

Zip: 49686

Association AE First Name (if different from above): Kimberly

Association AE Last Name (if different from above): Pontius

Association AE Contact Email (if different from above): kim@taar.com

### Activity Details

Please check the box of the application deadline for which you are applying.: July 15

**NOTE: Associations cannot receive funding for activities previously supported by a Housing Opportunity grant (ex. recurring events such as housing expos or classes) Contact NAR staff at [HousingOpportunityGrants@realtors.org](mailto:HousingOpportunityGrants@realtors.org) if you questions about eligibility.**

Review the [frequently asked questions](#) and [Tip Sheet](#) before completing the application.

Amount Requested (Max \$10000): \$10,000

1. Date of activity (or timeframe if an ongoing activity): 2020-08-17

2. What type of activity are you planning?: Marketing campaign

: This marketing campaign will be conducted starting in August 2020 and ending in July 2021.

3. Will the grant be funding a project in a rural community within your association's jurisdiction? Note that the Rural Housing Service defines "rural" as areas with less than 30,000 population and rural in character.: Yes

4. Describe the proposed activity including specific details about how the activity will be executed.: The Traverse Area Association of REALTORS® (TAAR) would like to support the Housing North communication strategy and its Homes for Our Future public awareness campaign through enhanced outreach to local governments and community organizations, webinars, and advocacy resources and training. Housing North (<http://housingnorth.org/>) is a cross-sector group of regional housing partners to overcome the communications, policy, and financial barriers that stand in the way of housing solutions. The Homes For Our Future Campaign is a call to action from the public, local governments, employers, and community organizations, and is intended to provide clear courses of action and resources about how to engage in, support, and lead work towards housing solutions. The HomesForOurFuture.org website provides information and resources on housing needs, solutions, and success stories, and includes up-to-date market studies, communications and messaging toolkits, checklists for local governments, information on policy initiatives, sample resolutions, PowerPoints, and opportunities to sign up to join the campaign. Housing North launched the Homes For Our Future campaign in January 2020, with a scheduled series of events to build awareness and participation throughout the region. Since mid-March when Michigan issued a Stay Home-Stay Safe order, Housing North has shifted communication and outreach from in-person meetings and events to an on-line webinar series, and continues to explore creative ways to connect and build engagement virtually. Housing North is now working with TAAR to develop

additional strategies for a virtual campaign and increased participation, endorsements, and advocates, including: - Organizing and developing a webinar series that can provide short, informative presentations to diverse audiences about housing needs, solutions, and advocacy opportunities. Resources including PowerPoint slides and recorded webinars will be made available on HomesForOurFuture.org. - Collecting resolutions and endorsements from local governments and community partners to build a coalition of housing supporters that can drive local and statewide action. - Creating a platform for a grassroots advocacy network through locally-based Homes for Our Future committees with locally-designated navigators for advocates that will provide information, opportunities and on-ramps, if you will, for local partner participation and advocacy. - Developing, promoting, and sharing advocacy materials and resources, including advocacy trainings and toolkits on HomesForOurFuture.org.

**5. Why is the association interested in conducting the activity?:** The Homes For Our Future Campaign has compiled a great deal of data regarding the need for housing in the Northern Michigan region, including surveys and studies of Young Professionals (Traverse Connect, which is the Traverse City regional chamber of commerce, and the Manistee Chamber of Commerce), Housing Needs Assessments (Michigan Statewide assessment, Benzie and Wexford Counties), Businesses (Leelanau Peninsula Economic Foundation), and most notably a Northern Michigan Target Market Analysis LandUse USA which shows the potential demand for new units in each county, city, and village in Northwest Lower Michigan through 2025. While the need for housing in Northwest Michigan is well-documented, including in the Northern Michigan Target Market Analysis, the region faces significant challenges in meeting that need - because of development costs, policy barriers, and community opposition. Overcoming these challenges will require significant public-private partnerships and community support - both of which require ongoing education and advocacy among multiple audiences. Traverse Area Association of REALTORS® (TAAR) hopes to support those education and advocacy efforts to better engage public and private sector partners while creating a development-friendly environment. Homes For Our Future has built the infrastructure to support action and advocacy from community organizations (REALTOR® Associations, chambers of commerce, trade associations, United Way, etc.), local community housing networks, employers, and the general public in creating housing ready communities. With information and resources available, individual partners and advocates must now be directly engaged as advocates and campaign partners that can drive local and statewide action on policy solutions and development. However, the barrier to entry for new housing advocates is high: many interested citizens and organizations lack the knowledge or experience with local and state governments to advocate effectively. TAAR and Housing North hope to provide the information and infrastructure needed to build an informed, active advocacy network with support from this Housing Opportunity Grant.

**6. What are the outcomes that the association expects to accomplish through this activity?:** We (Traverse Area Association of REALTORS®) expect to build an advocacy on-ramp, if you will, and network of local campaign committees; as well as a significant increase in the supporters and partners of the Homes For Our Future Campaign. Anticipated outcomes include: - Creation of a minimum of 5 local committees to support grassroots advocacy - A minimum of 5 advocacy training events - Development and promotion of an advocacy toolkit - Increased numbers of general public advocates and campaign supporters - Adoption of a minimum of 5 resolutions by county and local governments - Introduction of Housing Ready Checklists to a minimum of 5 local/county governments - A minimum of 10 sponsorships/endorsements by employers/affiliate advocacy groups

**7. How will the association measure the success of the activity?:** The Traverse Area Association of REALTORS® (TAAR) will measure success by the number of individuals, local governments, and employers/affiliate advocacy groups engaged in the Homes For Our Future campaign, as follows: - An increased number of informed individuals and organizations, shown by the number of attendees at each event and increased traffic to the HomesForOurFuture.org website. - An increased number of engaged citizens, shown by the number of individuals/organizations that sign up to be a housing advocate on HomesForOurFuture.org. - An increased effort by local governments to address housing issues in their communities, shown by an increase in resolutions supporting the goals of the Homes For Our Future campaign and Housing Ready Checklists preparing local communities to support additional future housing development. - Increased support from private and public organizations across the Northern Michigan region, shown by increased sponsorships and endorsements of the Homes For Our Future Campaign by private and public sector organizations. Increased engagement numbers will illustrate the success of the Homes For Our Future campaign events in driving action in Northwest Lower Michigan in efforts to create a housing ready environment.

**8. How will this activity help the association achieve its housing advocacy goals?:** These activities will forward the most important housing advocacy goal for our association and the country at large - increasing inventory to meet housing demands. The efforts of the Homes For Our Future campaign are designed to create housing ready communities by adding advocacy resources and creating a network that can work hand-in-hand with the efforts of the Traverse Area Association of REALTOR® (TAAR) to support development of housing opportunities. TAAR and Housing North have taken early steps to work together on local advocacy, with immediate results and action from local governments in the form of development approvals and zoning changes. The Housing Opportunity Grant and enhanced Homes For Our Future campaign will provide an opportunity to scale that work up to the regional level, creating more action and change throughout the region and potentially the State of Michigan.

**9. How will REALTORS® be involved in the planning and implementation of the activity?:** REALTORS® will participate in local Homes for Our Future committees, housing networks, and Housing North Advocacy and Communications committees. REALTORS® will also be invited and encouraged to participate in events and act as advocates.

**10. How will association staff be involved in the planning and implementation of the activity?:** Traverse Area Association of REALTORS® (TAAR) and Housing North staff will engage a qualified consultant to conduct the majority of the work. TAAR, Housing North staff, and consultant will meet regularly to plan and promote events and explore and develop advocacy strategies and activities. TAAR staff will review advocacy tools and assist in the sharing of information to its members. Additionally, TAAR will participate in the annual Northwest Michigan Housing Summit - an important Homes For Our Future event - by coordinating a keynote speaker and sharing key TAAR and REALTORS initiatives to support housing.

**11. List any organizations that will partner with your association in the activity. Describe their role(s) in the activity.:** Traverse Area Association of REALTORS® (TAAR) and Housing North will work closely together throughout the grant as described above, engaging a qualified consultant to develop resources, materials, and events, with TAAR and Housing North input and participation. Additionally, local and regional committees will work with TAAR, Housing North staff, and a consultant to provide input, guidance, and implementation assistance. Committee membership will include a broad base of partners, including Networks Northwest (Provider of workforce development, business & economic development, and community development for the ten county Lower Northwest Michigan region); Traverse Connect (The Traverse City regional chamber of commerce); local community foundations; local units of government such as the cities of Manistee, Charlevoix, Boyne City, East Jordan, Cadillac, Petoskey, Harbor Springs, Frankfort, Traverse City; the villages of Elk Rapids, Suttons Bay, Northport, and Kingsley; community colleges, including Baker College; employers, including Munson Healthcare; and housing agencies including Northwest Michigan Community Action Agency, Traverse City Housing Commission, the Northwest Michigan Coalition to End Homelessness, and Habitat for Humanity.

## Budget Details

12. Please provide your budget in the table below. If needed, provide additional details in response to question #13.

- |                                                                                                                                                                                                                                                        |                                                                                                                                                                                                                               |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"><li>• REALTOR® association staff time/hours</li><li>• Fundraising contributions</li><li>• Money to hold a fundraiser</li><li>• General operating expenses</li><li>• Donations to an organization or person</li></ul> | <ul style="list-style-type: none"><li>• Cash prizes or payment for gifts and prizes</li><li>• Materials for the construction or rehab of a home/building</li><li>• Landscaping materials</li><li>• Home furnishings</li></ul> |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

**Note: Associations are encouraged to use the majority of grant funds for expenditures related to the development and implementation of an activity (such as research, speaker fees, marketing, printing, etc.) rather than venue and catering costs.**

## Revenue

|                                   |          |
|-----------------------------------|----------|
| Housing Opportunity Program Grant | \$10,000 |
|-----------------------------------|----------|

(enter requested amount)

|                                                                           |          |
|---------------------------------------------------------------------------|----------|
| Contribution from your association = 10% of grant request                 | \$1,000  |
| Contribution from other REALTOR® association(s)                           | \$0      |
| Contribution from non-REALTOR® collaborating partners                     | \$4,000  |
| Admission fee/tickets                                                     | \$0      |
| Revenue from sponsors (e.g., booth rental, payment for advertising, etc.) | \$1,000  |
| Total                                                                     | \$16,000 |

#### Expenditures

|                                           |          |
|-------------------------------------------|----------|
| Consulting Fees                           | \$13,000 |
| Venue rental                              | \$0      |
| Catering/refreshments                     | \$0      |
| Marketing                                 | \$2,000  |
| Speaker fees                              | \$1,000  |
| Speaker expenses (travel, lodging, meals) | \$0      |
| Total                                     | \$16,000 |

**13. Additional Budget Information:** If applicable, use the space below to: provide explanations for "other" revenue or expenses noted above; provide an estimated number of attendees for activities with an admission fee; provide a breakdown of consulting fees; or provide details about in-kind contributions the association will make toward the activity.: Grant dollars will be used primarily to support fees and costs of a local consultant who is familiar with the region, TAAR, the Homes For Our Future campaign, and Housing North. The consultant will be engaged by TAAR and Housing North to assist in the development of webinars and communications, advocacy materials, promotions, web-related activities, and one-on-one outreach for campaign endorsements and committee participation, at a cost of \$100/hour with an anticipated total of 130 hours. Consultant expertise and capacity will allow TAAR and Housing North to maintain and build momentum for the Homes For Our Future campaign and advocacy efforts through consistent messaging, communication and advocacy materials. We anticipate some speaker fees for webinars, and will have costs associated with advertising and marketing to promote the events to a wider audience.

**14. For local associations:** The state association must be notified of this funding request. Provide the name and title of the person at the state association most familiar with the request.

First Name Association Contact: Doug

Last Name Association Contact: Merriam

Association Staff Email: dmerriam@mirealtors.com

**15. In reference to THIS activity, as described in question #4, has your association applied for funding from another NAR grant program including Smart Growth, Diversity, Placemaking, or Issues Mobilization?:** No

**16. If this funding request is approved, do you give NAR permission to share your application with others (either directly or on the REALTOR® Party website) as an example of a successful application?:** Yes

Please direct questions to: Wendy Penn 202-383-7504 [HousingOpportunityGrants@realtors.org](mailto:HousingOpportunityGrants@realtors.org)