



Competition Guidelines

Planning and Design Criteria

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The Competition

Project Statement

HUD’s Office of Policy Development and Research (PD&R) presents the 2024 Innovation in Affordable Housing Student Design and Planning Competition. Celebrating its 11th year, the competition invites teams of students pursuing graduate degrees to participate. The competition uniquely focuses on proposed solutions that demonstrate the interdisciplinary teams’ understanding of community, population served, housing affordability, and the development process, including design and finance.

A jury of subject matter experts selects innovative solutions that demonstrate originality, incorporating current best practices in design and finance, with high-level consideration given to the affordability, and sustainability of the proposed project designs. Solutions will be judged on social, financial, environmental, planning & design, and construction issues addressed by the proposals.

The 2024 partnering housing agency is the Madison Community Development Authority (CDA) in Madison, Wisconsin

As teams develop their proposals, the competition challenges them to apply innovative design strategies, while being thoughtful of the cultural and social context of the partnering community. Additionally, submissions should address the need for a moderately dense and sustainable mixed-income community that includes affordable and workforce housing while adding amenities and connecting the site to the surrounding neighborhood. This aspect of the project cannot be overstated, as quality of life for residents and the creation of true, vibrant neighborhoods goes beyond attention to physical structure.

First and foremost, entries will be evaluated for viable solutions demonstrating innovative, creative, and imaginative approaches. In past competitions, jurors and housing authority partners have been most impressed by original thinking, so don’t be afraid – in fact, teams are encouraged – to think outside of the box.

While the competition is based on an existing site selected by the housing authority, there is no guarantee that the solutions offered by the winning team will be incorporated by the Madison CDA. To the greatest extent possible, students should attempt to address potential challenges with implementing their solutions.

Competition Schedule

09-11-2023	Competition launch; registration opens
November 2023	Detailed Program Site and Housing Authority announced
01-08-2024	Deadline for teams to register and submit a finalized team roster, including all team member names and contact information: Noon Eastern Time



HUD Innovation in Affordable Housing

student design & planning competition

01-26-2024	Deadline for teams to submit Phase I: Noon Eastern Standard Time
02-20-2024	Finalists announced; Phase II released
03-7 & 3-8-2024	Site visit to Madison, WI for finalist teams
04-12-2024	Phase II submissions due
04-18-2024	Final presentations and awards ceremony in Washington D.C.

Awards and Recognition

\$20,000	First Place
\$10,000	Runner Up
\$5,000	Finalists

Eligibility

- The competition is open to current graduate students working as a team, with a minimum of three and a maximum of five students.
- Teams should represent various disciplines as the evaluation criteria include design, construction, planning, financial, environmental, and social issues.
- Each team must have students representing at least three disciplines that grant three different degrees, at least one of which must be from an architectural or design-related program, and one must be from a non-design-related discipline.
- Each team must work with one faculty advisor who may be from any of the team-represented disciplines and who serves only in an advisory capacity. The faculty advisor is not an active team participant.
- Students from different accredited educational institutions in the U.S. may combine to form a single team.
- Team leaders must be U.S. citizens or permanent residents; teams must comprise of at least three students who are U.S. citizens or permanent residents. The remaining team students may be international students.
- Due to federal requirements, only U.S. citizens or permanent residents are eligible to receive cash awards.

Competition Structure

The competition is conducted in two phases:

Phase I:

The following are required:

- A schematic design level site plan, schematic floor plans, section and building massing.
- Narrative to include rationale demonstrating an understanding of the community, planning, resident needs and provision of community services, and financing.
- Preliminary pro forma, as well as other financial calculations and leveraging using the template provided by HUD. Note: financing schemes should consider the overreliance on grant funding and capacity of PHA's to leverage private funding sources realistically.

The evaluation criteria emphasize innovation and an understanding of and provision for services

for the specified constituency, planning context (including zoning), and economic considerations related to affordable housing development (including financing, first cost, maintenance and operation, rental subsidies, etc.), as well as design. Phase I submissions will be evaluated by an independent subject-matter-expert panel of jurors, and four finalist teams will be selected to continue to Phase II based on the criteria described in the Planning and Design Criteria document.

Phase II:

Teams will be challenged to further refine their solutions, incorporating more detail, develop floor plans, refine their pro forma and analyses (economic, energy, etc.). Note, teams must HUD with their site designs in CADD files, to offer and for the benefit of the partnering PHA, tribe or TDHE in their utilization and examination of final design scheme proposals. However, teams will not be scored or evaluated based on their CADD files.

The four finalist teams will have the opportunity to travel to the project site in Madison, WI for a walk-through of the site and meet with housing authority management and staff on March 7-8, 2024.

The final presentations and award ceremony will be held on April 18, 2024, at HUD HQ in Washington, D.C. Travel expenses for both the site visit and final events will be paid for two members of each finalist team. Additional team members are encouraged to attend; however, travel costs will not be covered and will need to be arranged independently.

Evaluation Criteria

Teams will be evaluated on their ability to:

- Defend design and planning decisions.
- Provide enough detail to communicate innovation and innovative approaches to all aspects of the solution (e.g., planning, design, construction, planning, environmental, and social).
- Demonstrate innovative approaches to feasible financing, leveraging, and public/private collaboration. Note: Financing schemes should consider the overreliance on grant funding and capacity of PHA's to leverage private funding sources realistically.

Phase I Submissions

In the schematic phase, it is not necessary to provide a high level of detail. Teams should provide drawings and descriptions that best characterize concepts to the jury. General layouts will likely accomplish this and should include schematic site plan, building plans and sections, massing, and energy and financial analysis. Demonstration of the team's understanding of the social, financial, environmental, design, and construction issues is critical.

Narrative (three-page maximum)

- Include rationale and demonstrate an understanding of the community and resident needs, planning, resiliency and sustainability, and provision of community services, and financing.
- Be compelling. Focus on your description of what is innovative about your approach including, site planning, building configurations, materials and methods selection, mechanical systems, and community integration. Highlight unique and novel aspects of

your project.

- Be clear and concise.

Graphics (maximum four slides – PowerPoint or other)

- Teams should provide drawings and descriptions that best communicate their solution to the jury.
- The presentation should include graphics and analyses that visually convey critical and central tenets of your solution, such as schematic floor plans, section and building massing.
- Slide One MUST include the Site Plan.

Financial

- Pro forma, using the template (provided by HUD).
- Phase I financial submission should focus on sources and uses; a more detailed financial analysis will be required in Phase II.

Instructions for submission

- All submissions are to be electronic files, uploaded to the [competition website](#) by **noon EST January 26, 2024**.
- Written narrative (PDF or Word) to be on standard, white 8.5 x 11-inch paper, single-spaced and in a legible font (e.g., Times New Roman). The font size should be 11 pt. Set document margins to 1 inch on all sides.

Instructions for uploading (A link to upload submissions will be provided to participating teams ahead of the Phase I deadline.)

- Filename [e.g., [team ID number]_01_graphic_01]
- Filename [e.g., [team ID number]_01_narrative_01]
- Filename [e.g., [team ID number]_01_financial_01]

Phase II Submissions

Finalist teams will present Phase II submissions in person to the jury in front of an audience at HUD HQ in Washington, D.C. (travel conditions permitting). The presentation will also be webcast. A link to view the webcast will be available to registered attendees of the event. More information will be provided closer to the event date.

- The final submission is limited to six (6) slides, plus title and conclusion slide if desired, which may not contain presentation content (total of eight slides).
- Two (2) presentation boards, 20" X 30" maximum size, will be displayed during the presentations. Easels will be provided.
- Presentation files (ppt or other) must be 16 x 9 widescreen format with a non-white background (e.g., dark blue, black, etc.)

The Solution

Successful projects will solve for the design criteria and will demonstrate:

- An understanding of the needs of the intended residents and how those needs will be addressed innovatively in your design solution.
- Knowledge and understanding of codes and zoning restrictions and their impact on your solution.
- How your solution creatively responds to the opportunities and constraints imposed by the site.
- Knowledge and understanding of energy, water, resource efficiency, resiliency, and renewable energy strategies and how they can be incorporated into your design solution.
- How your solution integrates into the neighborhood and community.
- How your solution equitably addresses past injustices based on race, income, or other critical demographic and cultural differences.
- How your solution engages the community, and how diversity, equity and inclusion play a role.
- Knowledge and understanding of financing opportunities and constraints.
- Development and application of innovative financing solutions through leveraging and partnerships.
- Integration of best practices and technology into your solution.

The Jury

The jury will be announced at a later date.

Questions

During the competition, teams may send questions in writing to IAH@huduser.gov. Answers will be posted on the website throughout the competition. Please check the website Q&A page regularly.

HUD reserves the right to edit submitted questions before posting them to the website. HUD also reserves the right not to answer all questions and not post redundant questions or remarks deemed to be inappropriate or irrelevant.

Under *no circumstances* should there be any communication regarding the competition other than in the manner stipulated here, with HUD PD&R, or the housing authority staff or consultants who are working or have worked on the project, or the competition jury.

No phone calls or other contact is allowed with HUD, Madison CDA, or to competition jurors. Teams contacting HUD, Madison CDA, and/or jurors will be eliminated.

Terms and Conditions

Copyrights

By participating in this challenge, each member of the Student Team certifies that their Student Team's submission was created by the Student Team and that it is free of any copyright trademark, patent rights, or other intellectual property held by any other party.

HUD reserves the right to disqualify submissions containing material suspected of being intellectual property owned by another individual or entity and that cannot be proved to be original to the entrant.

HUD will claim no rights to intellectual property. Individuals on the Student Team will retain intellectual property ownership as applicable arising from their entry.

Publicity

By participating in this Competition, each member of the Student Team consents to the use, publication, reproduction and for all purposes, including publicity, promotion and advertising, in any media (including without limitation, the Internet, television, or offline promotions), each winner's name, city, photograph, likeness, voice, image, and competition entry each in perpetuity without further compensation, payment of fees or royalties, credit or right of review or approval.

Student Teams further consent to the use of personal information about the Student Teams and individual members of such teams by HUD, the partnering housing authority divisions, and third parties acting on their behalf.

Limitation of Liability

By participating in this challenge, each individual agrees to assume any and all risks and waive claims against the Federal Government and its related entities, except in the case of willful misconduct, for any injury, death, damage, or loss of property, revenue, or profits, whether direct, indirect, or consequential, arising from participation in this prize challenge, whether the injury, death, damage, or loss arises through negligence or otherwise.

Based on the subject matter of the challenge, the type of work that it will possibly require, as well as an analysis of the likelihood of any claims for death, bodily injury, or property damage, or loss potentially resulting from challenge participation, individuals are not required to obtain liability insurance or demonstrate financial responsibility to participate in this challenge.

By participating in this competition, each individual agrees to indemnify the Federal Government against third party claims for damages arising from or related to challenge activities.

By participating in this competition, each member of the Student Team agrees to release and hold harmless HUD and the partnering housing authority divisions, advertising and promotional

agencies, wholesalers and retailers, vendors, contractors, sub-contractors, and each of the foregoing entities' employees, officers, directors, shareholders, members and agents (collectively the "Released Parties"), from and against any and all claims, actions and/or liability for any injuries or death, loss or damage of any kind arising from or in connection with participation in and/or entry into the competition or acceptance, delivery, or use of any recognition, including without limitation, recognition of the finalists.

The Released Parties are not responsible or liable for any incorrect or inaccurate information, and assume no responsibility for (i) typographical or other errors in the printing of the promotional materials or the offering or announcement of recognition; (ii) any error, printing error, omission, interruption, defect or delay in operation or transmission at any website; (iii) failure of any entry to be received by HUD due to technical problems, printing error, human error or traffic congestion on the Internet or at any website; (iv) communications line, hardware and/or software failures; (v) damage to any computer (software or hardware) resulting from participation in the competition; (vi) theft or destruction of, tampering with, unauthorized access to, or alteration of entries and/or entry information; or (vii) entries that are late, lost, stolen, damaged, illegible and/or unintelligible (or any combination thereof).

General Conditions

All federal, state, and local laws and regulations apply.

HUD reserves the right, in its sole discretion, to cancel, terminate, modify or suspend this competition or any portion thereof, or to disqualify any individual, if for any reason: a) infection by computer virus, bugs, tampering, unauthorized intervention, actions by entrants, fraud, technical failures, or any other causes which, in HUD's sole opinion, corrupt or affect the administration, security, fairness, integrity or proper conduct of the competition; (b) the competition or any website associated therewith (or any portion thereof) becomes corrupted or does not allow the proper processing of entries; or (c) the competition is otherwise not capable of running as planned.

Planning and Design Criteria

As in past years, the HUD Innovation in Affordable Housing (IAH) competition focuses on innovation. Understanding innovation provides a foundation for approaching your solution and should be a starting point for each team. Innovation has three basic definitions: a new idea, the act or process of introducing new ideas, and the process of translating an idea or invention into a good or service that increases value. In application, the starting point for innovative design is deconstructing the design program and the owner's objectives for the project: What are we attempting to accomplish? What are the performance attributes we wish to improve? How can we improve durability, reduce energy consumption, improve resource utilization, improve indoor environmental quality, reduce environmental impact, increase community integration, increase density, improve resident quality of life, all while reducing first-cost? By analyzing and deconstructing the problem statement, and by asking insightful questions, we place ourselves in a position to uncover, develop, and deploy innovative solutions. It is this journey that constitutes innovative design and the road competitors should travel.

The HUD Innovation in Affordable Housing competition is specifically asking teams to identify and develop innovative ideas and solutions. Innovation should be highlighted in all aspects outlined below, while balancing affordability with resource efficiency, durability, and resiliency. The dwellings should be designed for accessibility and healthy living with natural daylight and indoor environmental quality, as well as defined outdoor community and appropriate recreational spaces. The integration of advanced technologies is encouraged along with renewable and renewable-ready design.

Creative and imaginative solutions are sought. Keep in mind that jurors and housing authorities will be most impressed by original thinking. Teams are encouraged to create a new narrative for affordable housing, reimagining the way we plan for, design, and build affordable housing.

While teams should emphasize innovation in all aspects of their solutions, the following criteria should be investigated:

Environmental

- **Durability:** Long lasting/low maintenance requirements.
- **Healthy:** Design for occupant health, safety, and psychological well-being.
- **Energy and Water Efficient:** Design for low-energy and low-water use requirements.
- **Resource Efficient:** Efficient use of materials; rapidly renewable materials; recycled content/recyclable.
- **Low-impact:** Design that either enhances or does not significantly diminish environmental quality.
- **Resilient:** Design and construction of buildings that resist natural and man-made hazards and provide for the protection of life, safety, and security of all residents.
- **Life Cycle Assessment:** Technique to assess environmental impacts of a product over all stages of its life.

Financial

- **Funding:** Primary sources contributing to financial pro forma; understanding rules, regulations, and guidelines.
- **Leveraging:** Secondary sources making use of or combining various financial instruments, such as tax credits, to increase the potential return of an investment.
- **Cash Flow:** Explore all potential funding sources and create alternative or innovative financing plans.
- **Affordable:** Determine cost effective measures to construct and operate over the long term.
- **Initial Capital Cost:** Fixed, one-time expenses associated with development.
- **Operations and Maintenance:** Day-to-day activities required to ensure that the building, systems, and equipment perform as intended.
- **Design for Replacement:** Ease of replacing systems, equipment, or building components as they wear or fail.
- **Infrastructure Longevity:** Design to remain serviceable well beyond financing term.

Social

- **Neighborhood:** Allowing for and encouraging social interaction among residents of a distinct community and within the wider surrounding community.
- **Access to Employment and Services:** Provide or make use of existing transportation networks to link the site with commercial centers.
- **Accessible:** Readily usable by individuals with varying degrees of physical ability.
- **Sense of Community:** Emotional connections wherein residents care about the community, value their relationships to community and its members, and are invested in the future of the community.
- **Social Networking:** The ability to connect with people and places, including access to amenities, health care, and supportive services, contributes to overall well-being, helps to lower the risk of isolation, and enhances independence.
- **Sense of Place:** Creating an imageable perception of a unique or special place.
- **Sense of Control and Comfort:** Engendering individual ownership of place to promote physical and emotional well-being.

Equity

- **Redressing Past Social Injustices:** Equitably addressing past injustices based on race, income, or other critical demographic and cultural differences.

The Project:

The Madison CDA owns and operates the Romnes Apartments, a 169-unit public housing building situated on a 7-acre site at 540 W. Olin Ave., Madison, WI 53715, established in 1968 to offer affordable housing within the community. As the two-story, horseshoe-shaped structure would likely face overwhelming rehabilitation and modernization costs in its existing form, CDA expects that it may be most cost-effective to ultimately demolish the facility and replace it with one or more buildings on the same site providing improved resident amenities, sustainable and climate-friendly design features, and operational efficiencies. This process will include repositioning the 169 Public Housing units residents through a RAD/Section 18 blend application.

The primary goal for this project is to create a moderately dense and sustainable mixed-income community that includes affordable and workforce housing. To accomplish this goal, the project should include both multifamily rental developments as well as affordable homeownership opportunities while connecting the site to the surrounding Bay Creek neighborhood.



Site Development:

The current unit density on the site is approximately 21 units per acre. However, zoning allows up to 90 units per acre. The CDA would like to see a redevelopment that increases density but is thoughtful of the lower density neighborhood context and that connects the site to the neighborhood. Just as important, the CDA wants to ensure the existing residents are able to stay onsite and move just once, into their new unit. This presents a logistical phasing challenge due to the placement of the current building and the available open space. Also, upon completion of construction there should be onsite resident amenities including space for healthcare services, self-sufficiency programming, and supportive services. Finally, there should be a space for HUD and Madison CDA staff to use for project planning meetings as well as for internal HUD staff meetings.

Affordability:

Public Housing replacement units are likely to be financed using a RAD/Section 18 Blend and rents should be set accordingly. Additional new rental units are expected to have some amount of affordability based on proposed funding sources. Any homeownership opportunity should be targeted at households at or under 120% AMI.

For the repositioned Public Housing units:

- The RAD portion (likely 40%) is \$946.00 for the 168 one-bedroom units and \$1,102.00 for the 1 two-bedroom unit.
- The Section 18 portion (likely 60%) will use SAFMRs @ 110% payment standards. Those numbers are \$1,639 for the one-bedrooms and \$1,903 for the two-bedroom.

Program:

The Madison Community Development Authority's Housing Operations Division oversees 742 Public Housing units and 115 Multifamily Housing units across 40 locations in Madison, catering to low-income families, individuals over 50, and those with disabilities. Moreover, the CDA manages the Section 8 Housing Choice Voucher Program, offering support to around 1,750 low-income households within the city. Operating under the Community Development Authority of the City of Madison (CDA), this division fulfills the roles of the Housing Authority, Redevelopment Authority, and Housing Finance Authority as mandated by statute for the city.

Critical Considerations:

Successful projects will address the program, solve for the design criteria, and will respond to the following questions:

- What aspects of your design innovatively addresses the CDA's need to create a moderately dense and sustainable mixed-income community that includes affordable ownership and rental opportunities while phasing development to eliminate the displacement of current residents?
- How does your solution respond to the site, zoning, and building code requirements or restrictions?
- How does your proposed design interact with the site?
- What innovative approaches did you employ in developing your design relative to the restrictions or opportunities presented by the site?
- What innovative energy efficiency, water conservation, and renewable energy strategies

did you incorporate into your design?

- What innovative approaches did you employ in order to integrate your design into the neighborhood and community?
- How are themes of transit-oriented development emphasized?
- What services and activity settings are planned and provided for to improve the quality of life for the population served?
- How are you planning to finance the project?
- What innovative financing solutions did you explore for leveraging and partnerships?
- Explain how your design and financial solutions innovatively integrate best practices and technology into your solution.

Financial Considerations:

Public Housing replacement units should be considered like-for-like with 168 one-bedroom units, and 1 two-bedroom unit. Additional new rental units should be varied between one-through four-bedroom units and have some amount of affordability based on proposed funding sources. Any homeownership opportunity should be targeted at households at or under 120% AMI.

Accessibility Regulations

Federal:

Fair Housing Amendments Act (FHA)

- In newly constructed non-elevator buildings containing at least 4 dwelling units, all ground floor units must comply with the FHA’s seven design and construction requirements.
 - Req 1: Accessible building entrance on an accessible route
 - Req 2: Accessible public and common-use areas
 - Req 3: Usable doors
 - Req 4: Accessible route into and through the unit
 - Req 5: Controls in accessible locations
 - Req 6: Reinforced walls for the later installation of grab bars
 - Req 7: Usable kitchens and bathrooms
- There are 10 HUD-approved ‘safe harbors’ for FHA compliance. They can be found here: <http://www.fairhousingfirst.org/faq/safeharbors.html>

Section 504 of the Rehab Act of 1973 (Section 504)

- Section 504 requires access to programs which receive HUD funding. When a newly constructed HUD-funded housing development contains at least 5 units, ‘the project’ is subject to Section 504. Housing developed by a Housing Authority is subject to Section 504. Among other requirements of the Section 504 regulations; no less than 5% of the total number of dwelling units in ‘the project’ must comply with the accessible design and construction requirements of the Uniform Federal Accessibility Standards (UFAS) or the 2010 ADA Standards for Accessible Design; these must be disbursed throughout the building(s) and site and among the various unit types available. An additional 2% of the total number of dwelling units in ‘the project’ must accommodate the needs of people with hearing and visual disabilities (H&V units). The Section 504 regulations can be

found here:

http://portal.hud.gov/hudportal/HUD?src=/program_offices/fair_housing_equal_opp/disabilities/sect504faq; UFAS can be found here: <http://www.access-board.gov/guidelines-and-standards/buildings-and-sites/about-the-aba-standards/ufas>; the 2010 ADA Standards for Accessible Design can be found here: https://www.ada.gov/2010ADASTandards_index.htm

Americans with Disabilities Act Title II (ADA)

- Title II of the ADA applies to activities of states and local governments. A housing authority is considered part of a local government. As a result, Title II applies to all housing developed by a housing authority. No less than 5% of the total number of dwelling units in ‘the project’ must comply with the accessible design and construction requirements of the 2010 ADA Standards for Accessible Design; these must be disbursed throughout the site and among the various unit types available. An additional 2% of the total number of dwelling units in ‘the project’ must accommodate the needs of people with hearing and visual disabilities. The 2010 ADA Standards can be found here: http://www.ada.gov/2010ADASTandards_index.htm

NOTE: Use of the 2010 Standards for Accessible Design in lieu of UFAS will satisfy the accessible design and construction requirements of Title II of the ADA and Section 504.

State:

The Wisconsin Fair Housing Law protects the rights of people in the rental or purchase of housing. It is unlawful to discriminate against a person in housing because of that person's protected class.

Protected classes are:

- Race
- Source of Income
- Sex
- National Origin
- Religion
- Family Status
- Disability
- Marital Status
- Color
- Age
- Sexual Orientation
- Ancestry
- Status as a Victim of Domestic Abuse, Sexual Assault or Stalking

All housing is covered under the law except when a person is seeking a roommate to share a dwelling.

Exceptions under the law include circumstances when a person's protected characteristic may be considered. A few examples are:

- A family with too many people may be turned away, if a reasonable government requirement limits the number of occupants for the dwelling unit.
- Housing primarily intended and operated for older persons may, under certain conditions,

be restricted to persons over a certain age.

- Housing may be denied to a person who poses a direct threat to the safety of others or whose tenancy would result in substantial physical damage to property, provided the risk can't be sufficiently reduced by a reasonable accommodation.

City of Madison and Dane County Protected Classes: City and county fair housing ordinances include additional protected classes.

They are:

- Military Discharge Status – Type of military discharge, also including active-duty status.
- Physical Appearance – The outward appearance of any person.
- Political Beliefs – A person's opinions concerning the social, economic and governmental structure of society and its institutions.
- Student Status – Having or not having standing as an enrollee of a school or apprenticeship program.
- Domestic Partnership – Two adults in a relationship of mutual support, who occupy the same dwelling as a single housekeeping unit, and whose relationship is of a permanent domestic character.
- Tenant Union Association – Persons who form or are associated with a tenant union.
- Gender Identity – Identifying or presenting oneself as male, female or androgynous, regardless of one's biological sex at birth.
- Genetic Identity – Genetic information unique to the individual, including information about genetic tests. (City of Madison only)
- Citizenship Status – The immigration status or citizenship of any person. (City of Madison only)
- Receipt of Rental Assistance – Participants in the Housing Choice Voucher Program (Section 8) or persons who receive other types of rental assistance.
- Nonreligion – Atheism, agnosticism, or other disbelief or lack of belief in the existence of God or gods. (City of Madison only)
- Homelessness – The status of lacking housing, including having a shelter or transitional housing facility as a primary residence. (City of Madison only)
- Unemployment - The status of not having a job or employment. (City of Madison only)
- Status as a Building Code Complainant - Persons who have complained to their housing provider, the City of Madison Building Inspection Division of the Department of Planning and Community and Economic Development, Public Health Madison and Dane County, or to any state or local investigatory or enforcement agency within the last six months. (City of Madison only)

Applicable HUD Programs:

The Rental Assistance Demonstration (RAD)

- The Housing Authority plans to use HUD's RAD program to help finance the rehabilitation or redevelopment of the property.
- RAD allows proven financing tools to be applied to at-risk public and assisted housing and has two components:

1st Component - Allows Public Housing and Moderate Rehabilitation (Mod Rehab) properties to convert, under a competition limited to 60,000 units, to long-term Section 8 rental assistance contracts;

2nd Component - Allows Rent Supplement (Rent Supp), Rental Assistance Payment (RAP), and Mod Rehab properties to convert tenant-based vouchers issued upon contract expiration or termination to project-based assistance.

- RAD is a central part of the Department's rental housing preservation strategy, which works to preserve the nation's stock of deeply affordable rental housing, promote efficiency within and among HUD programs, and build strong, stable communities.

Housing Choice Voucher Program Section 8

- The housing choice voucher program is the federal government's major program for assisting very low-income families, the elderly, and the disabled to afford decent, safe, and sanitary housing in the private market. Since housing assistance is provided on behalf of the family or individual, participants are able to find their own housing, including single-family homes, townhouses and apartments.
- The participant is free to choose any housing that meets the requirements of the program and is not limited to units located in subsidized housing projects.
- Housing choice vouchers are administered locally by public housing agencies (PHAs). The PHAs receive federal funds from the U.S. Department of Housing and Urban Development (HUD) to administer the voucher program.
- A family that is issued a housing voucher is responsible for finding a suitable housing unit of the family's choice where the owner agrees to rent under the program. This unit may include the family's present residence. Rental units must meet minimum standards of health and safety, as determined by the PHA, tribe or TDHE.
- A housing subsidy is paid to the landlord directly by the PHA, tribe or TDHE on behalf of the participating family. The family then pays the difference between the actual rent charged by the landlord and the amount subsidized by the program. Under certain circumstances, if authorized by the PHA, a family may use its voucher to purchase a modest home.

Other Applicable Federal Programs:

LIHTC

- The Low-Income Housing Tax Credit (LIHTC) program uses tax policy to help develop affordable rental housing for low and very low-income families. Originally part of the Tax Reform Act of 1986, the LIHTC program leverages private capital and investor equity to support the development of new and rehabilitated affordable rental housing.
- In general, state governments can adapt the LIHTC program to meet their housing needs under broad federal guidelines.
- The private sector carries all development and marketing risk and enforces strong oversight and accountability. Investors only get to claim and keep the tax credits if their units are built, leased, and maintained as affordable housing throughout a 15-year compliance period.
- Many states enforce a 15-year extended-use period to require that properties stay

affordable beyond the first 15 years.

- States use a competitive process to award developers with credits.

CDBG

- The Community Development Block Grant (CDBG) Program provides annual grants on a formula basis to states, cities, and counties to develop viable urban communities by providing decent housing and a suitable living environment, and by expanding economic opportunities, principally for low- and moderate-income persons.

The CDBG program was designed to reinforce several important values and principles of community development:

- CDBG's flexibility empowers people and communities to design and implement strategies tailored to their own needs and priorities.
- CDBG's emphasis on consolidated planning expands and strengthens partnerships among all levels of government and the private sector in enhancing community development.
- CDBG's technical assistance activities and set-aside for grantees builds the capacity of these partners.

CDBG-DR

- Community Development Block Grant Disaster Recovery (CDBG-DR) grant funds are appropriated by Congress and allocated by HUD to rebuild disaster-impacted areas and provide crucial seed money to start the long-term recovery process.
- These flexible grants help cities, counties, Indian tribes, and States recover from Presidentially declared disasters, especially in low-income areas, subject to availability of supplemental appropriations. Since CDBG-DR assistance may fund a broad range of recovery activities, HUD can help communities and neighborhoods that otherwise might not recover due to limited resources.
- CDBG's flexibility empowers people and communities to design and implement strategies tailored to their own needs and priorities.
- CDBG's emphasis on consolidated planning expands and strengthens partnerships among all levels of government and the private sector in enhancing community development.
- CDBG's technical assistance activities and set-aside for grantees builds the capacity of these partners.

HOME and CDBG

- Two programs form the cornerstone of the U.S. Department of Housing and Urban Development's (HUD's) community development efforts—the HOME Investment Partnerships Program and the Community Development Block Grant (CDBG). Across the country, HOME and CDBG funds are helping communities develop new affordable housing for both renters and homebuyers, rehabilitate existing homes, and turn around troubled neighborhoods.
- While HOME and CDBG share the same goals—the growth and improvement of America's communities—the programs differ in important ways. For example, HOME and CDBG have different eligible activities, different approaches to meeting the needs of

- low- and moderate-income families, and different rules regarding matching funds.
- By using HOME and CDBG funds strategically, communities can optimize their use of both funding sources, while working within the limitations and regulations of both programs.

Federal Home Loan Bank

- Affordable Housing Program

Applicable State Programs:

Wisconsin Housing and Economic Development Authority (WHEDA)

- State 4% Housing Tax Credit

Applicable Local Programs:

Dane County

- Affordable Housing Development Fund (AHDF)

Madison Development Corporation

- Dane Workforce Housing Fund

City of Madison

- Affordable Housing Fund (AHF)

** Please note: Due to the location of the site and the nature of the single-family housing context, teams should not consider Tax Incremental Financing (TIF) as a funding option for projects.*