# ANNUAL REPORT

**of the**

# SHIMBERG CENTER FOR AFFORDABLE HOUSING

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# Cover Story

**Affordable Housing Suitability Model**

As housing costs have skyrocketed, the availability of affordable housing has declined. The issue has become critical throughout Florida as communities try to ensure that people of all income levels have access to affordable housing.

The University of Florida College of Design, Construction and Planning, supported by a $500,000 gift from the Wachovia Foundation, is beginning a three-year project to address the state's affordable housing issues by identifying and assessing the suitability of sites for affordable housing development and preservation. Using Geographic Information Systems (GIS) and data sets, project leaders will work with case study communities to design, build, test, and refine a flexible, spatial suitability model that will locate and evaluate sites for affordable housing development and preservation. The model and its design process will integrate land use analysis, weighted spatial indicators relevant to affordable housing, and GIS spatial analysis tools.

**Partnerships with local communities**

The project leaders will partner with case study partners to assess and refine the model. A preliminary study has already been completed with the City of Jacksonville, which involved identifying public lands consistent with House Bill 1363. Anticipated outcomes and policy implications of the project are that local governments, and those that partner with them to address affordable housing needs, will have the means to visualize policy recommendations to better coordinate land acquisition activities and to more effectively balance competing goals. The schematic shown on the cover is an example of the site suitability factors considered in a preliminary affordability model developed with the City of Jacksonville.

**Applications of the Affordable Housing Suitability Model**

The Affordable Housing Suitability Model will have immediate applicability for state agencies, local governments, for-profits, lending institutions, community development corporations, other non-profits, such as the Florida Housing Coalition, and other stakeholders involved in housing development and preservation. These applications may include:

- Identifying surplus public lands suitable for affordable housing purposes in accordance with HB 1363.
- Assessing neighborhood revitalization opportunities while maintaining housing affordability.
- Offering a means to evaluate lands for Community Land Trusts, an increasingly significant approach to address housing needs in Florida.
- Identifying and ranking parcel locations to assist in prioritizing and targeting expenditure of the state housing trust fund.

**Research leadership**

This project brings together two significant research centers in the University of Florida's College of Design, Construction and Planning to develop the Affordable Housing Suitability (AHS) model: the Shimberg Center for Affordable Housing in the Rinker School of Building Construction and the GeoPlan Center in the Department of Urban and Regional Planning

## AUTHORIZATION

The Shimberg Center for Affordable Housing in the College of Design, Construction, and Planning, Rinker School of Building Construction, at the University of Florida was created by the Florida legislature in 1988. The text of Section 1004.46, Florida Statutes, establishing the Center and as amended by the William E. Sadowski Affordable Housing Act of 1992 reads:

> *The Board of Regents shall establish the Multidisciplinary Center for Affordable Housing within the School of Building Construction of the College of Architecture of the University of Florida with the collaboration of other related disciplines such as agriculture, business administration, engineering, law, and medicine. The center shall work in conjunction with other colleges in the State University System. The Multidisciplinary Center for Affordable Housing shall:*
>
> *(a) Conduct research relating to the problems and solutions associated with the availability of affordable housing in the state for families who are below the median income level and widely disseminate the results of such research to appropriate public and private audiences in the state. Such research shall emphasize methods to improve the planning, design, and production of affordable housing, including, but not limited to, the financial, maintenance, management, and regulatory aspects of residential development.*
> *(b) Provide public services to local, regional, and state agencies, units of government, and authorities by helping them create regulatory climates that are amendable to the introduction of affordable housing within their jurisdictions.*
> *(c) Conduct special research relating to fire safety.*
> *(d) Provide a focus for the teaching of new technology and skills relating to affordable housing in the state.*
> *(e) Develop a base of informational and financial support from the private sector for the activities of the center.*
> *(f) Develop prototypes for both multifamily and single-family units.*
> *(g) Establish a research agenda and general work plan in cooperation with the Department of Community Affairs, which is the state agency responsible for research and planning for affordable housing and for training and technical assistance for providers of affordable housing.*
> *(h) Submit a report to the Governor, the President of the Senate, and the Speaker of the House of Representatives by January 1 of each year. The annual report shall include information relating to the activities of the center, including collaborative efforts with public and private entities, affordable housing models, and any other findings and recommendations related to the production of safe, decent, and affordable housing.*

This Annual Report has been prepared and submitted in response to and in accordance with Section 1004.46(h), F.S.

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## EXECUTIVE SUMMARY

The purpose of this Annual Report is to describe the highlights of the teaching, research, and service activities of the Shimberg Center for Affordable Housing during the past year. A separate administrative section is presented that describes the Shimberg Center team members and the funding for the Center. An Appendix is included listing the various publications that have been produced independently by the Center.

Three major areas of activity have dominated the Center's activities:

- Development of the Home Structure Rating System to assess hurricane storm worthiness of Florida's homes,
- Teaming Florida State University economists with economists from the UF Bureau of Economic and Business Research for the purpose of modeling the economic impact of alternative approaches to property taxation in Florida,
- Teaming with the UF Department of Urban & Regional Planning and its Geoplan Center to develop a tool for selecting sites that are appropriate for affordable housing development, and
- Continued maintenance and development of the Florida Housing Data Clearinghouse.

The Center operated with a staff of eighteen in 2007 including three students pursuing doctoral degrees and three pursuing masters degrees. Support for the staff came from the University $280,815 plus a combination of funds from foundations, the Center's endowments, and contracted research for a total operating budget of $1,155,963. Dr. Robert C. Stroh, Sr., continues serving as director of the Shimberg Center with Dr. Anne R. Williamson and William J. O'Dell serving as associate directors.

# Introduction

The 1988 legislative initiative that established the Shimberg Center for Affordable Housing envisioned a multi-disciplinary organization capable of addressing a broad range of housing and community development topics. In order to respond to this charge, the Shimberg Center has focused its effort in five housing-related areas: Housing Technology, Florida Housing Data Clearinghouse, Housing Policy & Programs, Teaching, and Service.

# Housing Technology

**Hurricane Damage Mitigation Training & Demonstration Centers**

Since 1998, with funding provided by the Florida Department of Financial Services, the Shimberg Center began building a state-wide network of six regional Windstorm Damage Mitigation Training & Demonstration Centers. The first regional center was built in St. Lucie County, Florida, in 1999. Similar facilities are now located in Escambia (1999), St. John's (2002), and Broward (2005) Counties. The goal is to have a facility located within a two-hour drive of every location in the state. The outreach and educational programming that takes place at the centers is planned and coordinated by the IFAS Program for Resource Efficient Communities. These regional centers will play a major role in breaking the cycle of destruction and reconstruction that has been associated with Florida's hurricane season. Unfortunately, funding for the final two facilities was eliminated in 2007 by the line-item veto powers of the Governor.

**Home Structure Rating System**

In late 2006 the Shimberg Center teamed with the College of Engineering and the IFAS Program for Resource Efficient Communities to develop a program for producing a Home Structure Rating System (HSRS) that can be used state wide. This work was funded by a contract from the Florida Office of Insurance Regulation. The University of Florida, Shimberg Center for Affordable Housing, coordinated the development of the Home Structure Rating System as authorized by the Florida Legislature in 2006 (SB-1980, Section 39). The multi-college team brought together resources from the Rinker School of Building Construction, the College of Engineering – Civil & Coastal Engineering, and the Program for Resource Efficient Communities in the Institute of Food and Agricultural Sciences (IFAS) to accomplish two tasks: 1) coordination and development of the Home Structure Rating System (HSRS) and 2) dissemination of information about the Home Structure Rating System to Florida's homeowners.

The HSRS focused on assessing the present condition of a home based on a visual inspection and estimating the cost and benefits that can accrue through specific wind damage mitigation improvements. The seven damage mitigation improvements considered are: Roof deck attachment, Secondary water barrier, Roof covering, Bracing gable ends, Reinforcing roof-to-wall connections, Opening protection, and Exterior door protection (including garage door). Where visual inspection was not adequate, the assumed condition of the structure was based on the year of its construction and the building code that was extant at the time of its construction.

In order for the Home Structure Rating System to have an impact on reducing the exposure of the existing housing inventory to damage from hurricanes or other windstorm activity, it was essential that homeowners be made aware of the program. Accordingly, the IFAS Program for Resource Efficient Communities prepared and distributed to county-level extension offices educational material about the program, the home inspection process, and the process that local homeowners must follow in order to apply for financial assistance from the Department Financial Services for recommended damage mitigation improvements for their homes. This state wide network of IFAS Extension faculty met face-to-face with local residents to explain the process and to answer questions thus providing a grass-roots aspect to the program.

The Home Structure Rating System uses the features of existing homes collected during a visual inspection by a certified inspector to rate the storm worthiness of the structure, to identify the most beneficial retrofit measures for the home, to provide a cost estimate of the recommended improvements, and to estimate the potential property insurance premium savings that may be realized.

**Energy Characteristics of New Homes in Florida**

Since February 2001, the Shimberg Center has received and processed the Energy Code Compliance Forms from every permit-issuing jurisdiction in Florida. A five percent random sample of the forms describing newly constructed single-family and multi-family residential buildings is drawn. As a result, the Center is able to publish periodic reports summarizing the energy conserving characteristics of new homes in Florida. These periodic reports illustrate changes over time as well as by major climatic region of the state. The most recent report is dated November 2003 and is titled *Energy-related Characteristics of Multi-family Housing Construction in Florida - 2003*. This and other publications of the Center are available on the Internet at www.shimberg.ufl.edu.

# Housing Policy & Programs

**The Oaks at Riverview HOPE VI Evaluation**

As 2007 drew to a close, the Shimberg Center's Housing Policy and Programs research team was in the process of finalizing its evaluation of The Oaks at Riverview, a HOPE VI redevelopment effort in Tampa. The Oaks at Riverview is a redevelopment of the site formerly occupied by distressed public housing complexes known as Riverview Terrace and Tom Dyer Homes. The Oaks is located in the historic Seminole Heights neighborhood, and the redevelopment effort has made a significant contribution to rising home values and reduction in crime rates in the surrounding area.

The Shimberg Center for Affordable Housing undertook this evaluation for the Tampa Housing Authority with the collaboration of its partner in community and economic development outreach activities, the Jim Walter Partnership Center of the University of South Florida. The Florida Survey Research Center at the University of Florida also contributed significant time and expertise to the evaluation. The final evaluation report will be delivered to the Tampa Housing Authority in January 2008.

**Florida Property Taxation**

The Shimberg Center for Affordable Housing successfully proposed to provide analytical services relating to property taxation in Florida as requested by the Florida Legislature's Office of Economic and Demographic Research (EDR). The Shimberg Center organized a team of the state's leading economic, real estate and housing policy faculty from the University of Florida and Florida State University. A pre-proposal planning session comprised of all team members agreed to divide the project into four elements and assigned primary performance responsibility as follows:

- **Revenue Effects** of the Save Our Homes provisions of s. 4(c), Article VII of the State Constitution addressed under the Scope of Services. The Bureau of Economic and Business Research at the University of Florida led this portion of the effort.
- **Assessment Effects** of the Save Our Homes provisions of s. 4(c), Article VII of the State Constitution as addressed under the Scope of Services. The Florida State University's Center for Real Estate Education and Research was the lead organization for this element with the University of Florida's Center for Real Estate Research contributing to the affordable-housing-related research included in the Scope of Services.
- **Analysis and Evaluation of Truth In Millage** notification process as defined under s. 200.069, Florida Statutes., and addressed under the Scope of Services. It was anticipated that the Office of EDR would provide data useful in this portion of the Scope of Services. If not, the Shimberg

Center would work with the Florida Survey Research Center to conduct field surveys and focus-group sessions while serving as lead for this portion of the research.

- **Integration and presentation of findings and policy options** as described under the Scope of Services will be a joint effort of all project team members with lead responsibility resting with the Shimberg Center for Affordable Housing.

Organizationally, the University of Florida's Shimberg Center for Affordable Housing served as the lead organization and the point of contact for Office of Economic and Demographic Research regarding both technical and administrative matters. In addition, the Shimberg Center was responsible for preparation of monthly progress reporting and integration of the findings and policy options into a comprehensive final report.

**City of Deltona Housing Needs Assessment**

The project consists of an analytical report for the City of Deltona regarding the current housing stock and projected future need for housing. The report was prepared using multiple data sources, including Census and local property appraiser information. Multiple maps were also provided using GIS technology to assist local policy makers and administrators with visualizing important aspects of the data analysis.

**City of Deltona Analysis of Impediments to Fair Housing Choice**

Following the successful completion of a housing needs assessment for the City of Deltona, the city requested further services from the Shimberg Center for Affordable Housing in the preparation of an *Analysis of Impediments to Fair Housing Choice*. This analytical report is required of all local jurisdictions receiving federal funds such as the HOME Investment Partnership program. The analysis builds on the housing needs assessment and provides the city with information it will use to develop strategies for addressing barriers to fair housing choice.

**University Area Community Development Corporation Anti-Crime Programming**

The Shimberg Center for Affordable Housing began its fourth year of service to the University Area Community Development Corporation in July 2007. These services will extend through June 2007, and primarily focus on exploring the linkages between crimes and housing condition. The project includes an extensive effort to survey the condition of housing within the target neighborhood on a parcel-by-parcel basis. This survey will provide information that will be useful for years to come in planning redevelopment efforts and in advocating for resources necessary to accomplish redevelopment and revitalization in this severely distressed area of North Tampa.

**Housing Element of the Hillsborough County Comprehensive Plan**

The Shimberg Center worked with Hillsborough County in the preparation of an updated Housing Element for its state-required Comprehensive Plan in 2007. This project built on information developed by the Shimberg Center while preparing the county's federal Consolidated Plan in 2006. The updated Housing Element provides detailed information to be used in the planning process through 2030.

## Florida Housing Data Clearinghouse

The origin of the Clearinghouse was with the Governor's Affordable Housing Study Commission. At the Commission's urging a working group of stakeholders that included representatives from local governments, regional entities, housing advocates, groups such as the Florida Home Builders Association and the Florida Association of Realtors, and state agencies was organized in 2000. The Housing Data Clearinghouse was created to provide public access to data on housing need and supply from a variety of national, state, and local sources.

In addition to collecting and developing housing data, the Clearinghouse is expanding its capacity to collect, produce, and store this information for easy public access. Users obtain data, produce reports, and perform analysis by going to the Clearinghouse website (http://www.flhousingdata.shimberg.ufl.edu). Indeed, the Affordable Housing Needs Assessment, which is the data and analysis package prepared by the Clearinghouse for each local government to aid them with their comprehensive planning responsibilities, is available on the clearinghouse website along with a variety of other reports.

The Clearinghouse successfully completed the fifth year of its original 5-year startup plan. As part of the completion of that 5-year plan and in anticipation of a second 5-year funding proposal to our contract manager, Florida Housing Finance Corporation, we underwent an intensive self-evaluation. The evaluation included a number of interviews with stakeholders and clients as well as several similar organizations throughout the U.S. At mid-year we were refunded by Florida Housing and have entered our sixth year of operation.

The Clearinghouse has been actively involved in the state's burgeoning interest in the preservation of its affordable housing inventory. The Clearinghouse has made extensive preservation-related additions to the general inventory of assisted housing; worked closely with the Governor's Affordable Housing Task Force in it's 2-year study of the preservation issue in Florida; was one of two case study partners in a National Low Income Housing Coalition (MacArthur Foundation-funded) investigation into development of a national preservation catalog; and with Florida Housing as a partner

received a $172,000 grant from the MacArthur Foundation to continue expanding capacity in the Clearinghouse to deliver useful information for this extremely important affordable housing policy initiative.

Fiscal Year 2005-2006 is the sixth year of operation. The Clearinghouse has begun a second, five-year development schedule led by the Shimberg Center. The FY2006-2007 state contract is $326,000, using monies from the State Housing Trust Fund, plus another $100,000 contributed by the Shimberg Center from its own resources. In addition, the Clearinghouse received a contract from the Department of Community Affairs for work in West Florida (Sustainable Emerald Coast) and a contract from Progress Energy to provide information for use in an energy conservation project. The Clearinghouse in partnership with the Florida Housing Finance Corporation also successfully pursued funding from the MacArthur Foundation for work in preservation of the state's affordable housing stock. And, we were recently notified of a gift from the Wachovia Foundation to design, test, and refine a flexible spatial model that will identify and assess the suitability of sites for affordable housing development and preservation. We were joined in the submission of this successful proposal to the Wachovia Foundation by two faculty members in the Department of Urban and Regional Planning, Kristin Larsen and Ilir Bejleri; we look forward to this partnership.

The responsibilities of the Florida Housing Data Clearinghouse include:

- Creating a data "warehouse" to store data for use by the public;
- Designing a website which allows for user-friendly access to housing data;
- Promoting standard formats to collect and share local housing data;
- Preparing the Affordable Housing Needs Assessment;
- Creating neighborhood-level affordable housing data;
- Preparing an annual report on the "State of Florida's Housing" to provide perspective on trends and conditions in housing at the state, regional, and local level;
- Preparing a statewide rental market study for the Florida Housing Finance Corporation; and
- Creating an integrated database of federal, state, and local assisted housing data.

**First Time Homebuyer Program** – the Center continues to provide assistance to Florida Housing Finance Corporation in evaluating its First Time Homebuyer Program relative to market share and target households.

**Preserving Affordable Housing** – With funding provided by the MacArthur Foundation, the Center teamed with the Florida Housing Finance Corporation, convened a national meeting of organizations already engaged in collecting housing preservation data and implemented a housing-preservation-related

data collection project in the state of Florida. The objective of organizing the meeting and conducting the data collection and analysis is to identify the information needs for housing policy and program development professionals and to create a data infrastructure that other states can implement for the preservation of the affordable rental housing.

**Affordable Housing Site Selection Modeling**

As housing costs have skyrocketed, the availability of affordable housing has declined. The issue has become critical throughout Florida as communities try to ensure that people of all income levels have access to affordable housing.

A $500,000 gift from the Wachovia Foundation to the University of Florida College of Design, Construction and Planning will allow researchers to address the state's affordable housing issues by identifying and assessing the suitability of sites for affordable housing development and preservation.

The three-year grant will support an interdisciplinary research project in the college between the Department of Urban and Regional Planning and the Shimberg Center for Affordable Housing, located in the Rinker School of Building Construction

. Wachovia's funding of this project allows integration of the expertise of the Shimberg Center, the research and knowledge of the Department of Urban and Regional Planning, and the cutting-edge spatial analysis available through the department's GeoPlan Center.

The project team from the Shimberg Center and the Department of Urban and Regional Planning will create a model that will assist Florida communities in evaluating and ranking the areas identified as suitable for affordable housing. The software and mapping tool they create will be unique in that it will incorporate the local values and vision of the communities with which they work. A critical component of the process is seeking and receiving community input through public hearings and meetings.

The community-based solutions that will result from this model represent an exciting potential breakthrough in the Florida affordable housing market.

## TEACHING

A formal "residential track" within the construction management curriculum of the M. E. Rinker, Sr. School of Building Construction was approved by the faculty in 1998 and implemented in 1999. This addition to the curriculum was the result of requests from the home building industry. Three undergraduate courses currently comprise the specialization: Creating Affordable Housing, Housing Transactions for Home Builders, and Project Planning & Feasibility. One graduate-level course focusing

on housing economics and housing policy in the United States is also offered by the Shimberg Center faculty.

Interest in the residential track of courses fell off in 2006 and 2007 because of the slow-down in the home building market. Only six students listed themselves as being enrolled in the Residential Tract. This number represents about one-tenth of the graduates each semester. A number of other undergraduate students and some graduate students took at least one of the courses as an elective. The project planning and feasibility class attracts an interdisciplinary group with students from such programs as urban planning, civil engineering, and real estate in addition to the building construction students.

The three courses that comprise the residential track offered within the Rinker School of Building Construction are:

- **Project Planning and Feasibility** exposes the student to the process of producing a proposal for development of a residential project on a specific site, generally a site provided by a local nonprofit organization. The proposal includes sections on market analysis, site analysis, project programming, schematic design, project cost estimate, and financial feasibility.
- **Creating Affordable Housing** introduces the student to the key factors that have produced changes in US cities that, in turn, have contributed to the current housing situation. The student gains an appreciation for ways to reduce the cost of housing delivery, factors in the delivery process (including federal, state, and local regulations, finance, building materials, construction methods) that contribute to affordability problems, and potential methods to facilitate the delivery of housing that is affordable to the buyer. Upon completion of the course the student has an appreciation for: non-technical factors impacting housing costs, current information on the regulations that effect homebuilding, and the alternative building systems available for use in residential construction. They will be prepared to intervene effectively in discussions regarding local land use and building regulations.
- **Housing Transactions for Homebuilders** is modeled on the real estate licensing course and provides an introduction to ownership rights in real property and limitations on those rights, the transfer of rights, the process of selling a property including contracts and closing, mortgages, markets, and valuation of property. The emphasis is on providing the homebuilder with a working knowledge of the sale and leasing of property. Upon completing the course the students will have an understanding of mortgage types, market opportunities, and the valuation process. They will also be able to complete the process of selling property including the documents involved.

The Shimberg Center offers one graduate-level course titled **Housing Economics and Policy** that familiarizes students with basic theories, concepts, terminology, and issues in housing as well as

examining the factors contributing to housing problems and evaluating housing policies. Upon completion of the course the student is able to estimate the demand for housing, examine the feasibility of a housing project, and understand the role of government, lenders, and other institutions in the housing market. The course attracts an interdisciplinary mix of students interested in housing. The enrollment for Spring Semester 2008 is fifteen students.

In addition to the graduate-level course in Housing Economics and Policy, the faculty has teamed with faculty from the Rinker School of Building Construction to offer a required graduate course titled **Research Methods in Building Construction**. The purpose of this course is to introduce beginning graduate students to the task of preparing a dissertation, thesis, or master's paper. It also provides a review of basic statistical methods that many of the graduate students will need in conducting their research.

Patricia Roset-Zuppa, one of the Ph. D. candidates supported by the Center, prepared and presented for the second time a 3-credit course titled "Housing and Urban Development", an undergraduate course offered by the Department of Urban and Regional Planning.

# SERVICE

The Shimberg Center is called upon by many organizations and communities to participate in working groups, to speak on issues related to the delivery of affordable housing, or to serve as an information resource and referral center. These requests for assistance span a range of topics such as building technology, building regulations, land development, financing, consumer education, and more. Responding appropriately to these requests is an important function of the Center in its efforts to encourage and facilitate the production of affordable housing throughout Florida.

## Information Dissemination

Volume XIII of the Center's bi-monthly newsletter titled, *Affordable Housing ISSUES*, included the following topics. A complete listing of the topics addressed in the newsletters is presented in Appendix A.

- December 2005 - *Creating Affordable Housing Demand*
- February 2006 – *Preservation of Affordable Housing Stock*
- April 2006 –*Impact of Construction & Real Estate on Florida's Economy – 2005 Update*
- June 2006 – *Hurricane Resistant Homes*

- August 2006 – *The Shimberg Center for Affordable Housing*
- October 2006 - *Florida's Commitment to Preservation of Affordable Housing*

All newsletters, annual reports, and technical reports are available publicly on the Internet at the Center's web site at http://www.shimberg.ufl.edu by clicking on "Publications" on the home page.

The members of the Shimberg Center team also are called upon to participate in various planning meetings, workshops, and conferences throughout the year such as:

- Invited speaker. National Low Income Housing Coalition, Housing Policy Conference, Washington, DC, 25 February 2007.
- Invited speaker. National Preservation Data Infrastructure Meeting, Ft. Lauderdale, FL, 17-18 May 2007.
- Speaker. European Network for Housing Research, International Conference, Rotterdam, The Netherlands, 25-28 June 2007.
- Moderator. Florida Housing Coalition, Statewide Affordable Housing Conference, Orlando, FL, 5-7 September, 2007.
- Invited speaker. Florida Coalition for the Homeless and the Florida Supportive Housing Coalition, Joint Statewide Conference, St. Petersburg, FL, 25-26 October 2007.
- Invited speaker. Florida Housing Finance Corporation, Board Meeting, Orlando, FL, 7 December 2007.
- Invited speaker. Governor's 2007 Windstorm Mitigation Study Committee, Tallahassee, FL, 15 Feb 2007.
- Video taping, Windstorm Damage Mitigation Training & Demonstration Center Tour, Ivanhoe Broadcast News, St. Augustine, FL, 2 March 2007.
- Invited panelist. In-service Training Workshop, "*Mitigation Measures to Minimize Windstorm Damage to Your Home: What You Need to Know*". IFAS County Extension Faculty. Hilton Conference Center. May 2007.
- Video Taping. WETV-Jacksonville. *Taking Action to Preserve Your Home from Hurricane Damage*. April 2007. St. Augustine, FL.
- Audio taping. WKTK-Gainesville with John Boyer. Windstorm Damage Mitigation Technologies, April 2007.
- Invited speaker & member. City of Alachua-Affordable Housing Committee, July 2007
- Dissertation reviewer. Indian Institute of Technology, Delhi (Mr. Nirmal Kumar), November 2007.
- Association for Budgeting and Financial Management, *Informed Citizens and the Local Government Budget Process: Florida's Truth-in-Millage Act*. 19th Annual Conference, Washington, DC, October 25-27, 2007.
- American Collegiate Schools of Planning, *Local Housing Plans and the Low Income Housing Tax Credit*. Annual Conference, Milwaukee, Wisconsin, October 18-21, 2007.
- Roset-Zuppa, Patricia. 2007. *Sustaining the Affordability of Rental Housing in Florida: Challenges and Opportunities*. Conference paper presented at the International Conference of the European Network for Housing Research, Rotterdam, The Netherlands, June 2007.
- The National Low Income Housing Coalition invited the Clearinghouse team to present at its annual Housing Policy Conference in Washington, DC in February. Anne Ray and Patricia Roset-Zuppa prepared

a presentation titled "Preserving Affordable Rental Housing: The Role of Data" to discuss the MacArthur research, the Clearinghouse and data issues.

- The National Low Income Housing Coalition organized a meeting to discuss a new initiative for property-level data collection using local project monitors. The Clearinghouse was invited to make a presentation. Patricia Roset-Zuppa attended to present on the work of the Clearinghouse and the preservation-related data. The meeting took place in Miami in May 2007.
- At the National Preservation Data Infrastructure Meeting, Marc Smith and Patricia Roset-Zuppa made a presentation on their preliminary risk analysis research findings and facilitated a discussion with the audience about risk analysis methodologies and preservation.
- Presentation to Florida Housing Finance Corp. staff titled "Potential changes to the current Needs Assessment methodology with application to the 2007 Rental Market Study."
- Presentation to the Dept. of Elder Affairs Best Practices Conference titled "The Clearinghouse – An Overview"
- Presentation to the Indian River County Commission titled "The Need for Affordable Housing in Indian River County – An Overview."
- Presentation to Florida Legal Services conference titled "The Assisted Housing Inventory and How to Use It."
- Florida Defense Alliance/Special Meeting for Florida Military Installation Commanders – Affordable Housing for the Military in Florida.
- Presentation to Sustainable Emerald Coast – Housing in West Florida.
- Board member. Florida Housing Coalition. Tallahassee, FL.
- Board member. Neighborhood Housing and Development Corporation, Gainesville, FL.

The Shimberg Center's faculty also prepared scholarly works that are available in refereed academic journals:

- Williamson, Anne R., "Creating New Patterns of Social and Economic Activity through Planned Housing Environments: HOPE VI and Neighborhood Transformation", *Journal of Community Practice,* Vol. 15, No. 4 (Winter 2007).
- Williamson, Anne R., "A Decent Home for Every Family? Housing Policy Initiatives since the 1980s", *Journal of Sociology & Social Welfare*, Vol. XXXV (forthcoming March 2008).
- Williamson, Anne R., "Owning a Home: New Opportunities and Challenges for Low-Income Women", *Journal of Poverty* (forthcoming).

In addition to formal presentations and publications, the Shimberg Center personnel respond to telephone and e-mail inquiries received on a daily basis from a broad range of audiences ranging from newspaper and television reporters, to local government offices, to private sector organizations interested in serving the needs of Florida's growing population.

# ADMINISTRATION

## Financial

The funds that support the Shimberg Center's activities come from three sources: 1) university funds, 2) endowment earnings, and 3) contracts and grants. During the fiscal year ending 30 June 2007, the Shimberg Center for Affordable Housing received $280,815 for salaries & benefits, for other expenses,

and other personnel services funds from the University of Florida. The distribution of these funds by expense category for FY 2004 through FY 2007 is shown below.

| Fiscal year → | 2003 | 2004 | 2005 | 2006 | 2007 |
|---|---|---|---|---|---|
| **Total** | $255,684 | $260,044 | $268,790 | $256,755 | $280,815 |
| **Expense category** | | | | | |
| Salaries & benefits | 91% | 92%% | 92% | 91% | 92% |
| Other personnel | 2% | 2% | 2% | 3% | 2% |
| Other expenses | 6% | 6% | 6% | 6% | 6% |

The estimated annual earnings from the endowments that are administered by the University of Florida Foundation for the Shimberg Center provide another $96,988 for the support of faculty and graduate research assistants plus approximately $12,890 per year for discretionary uses. The Center's two endowments are:

- Ida Rogero Childre Fellowship/Assistantship in Affordable Housing
- James H. Shimberg Professorships/Fellowships Endowment & Discretionary Endowment

The other sources of funding for the Center are contract and grant supported activities. In FY 2007 the total contract and grant awards received from state and local agencies, from private corporations, and from foundations came to $1,155,963. This total includes two major projects that began in the last quarter of 2006 and continued beyond mid 2007. Combining this funded research with the FY 2007 University support and the support from UF Foundation endowments brought the total operating budget to $1,546,656. This total represents a leverage of 5.5:1 for the support provided by the University.

## Personnel

Dr. Robert C. Stroh, Sr. continues to serve as director of the Center and both Dr. Anne R. Williamson and Mr. William J. O'Dell continue serving as Associate Directors. Dr. Williamson leads the housing policy and programs area and Mr. O'Dell leads the development and application of the Florida Housing Data Clearinghouse. Office administration and secretarial support are provided by Ms. Linda Stanley. Other key members of the Shimberg Center's team are Mr. James Martinez who continues as coordinator of computer applications and implementation of Internet access to the Florida Housing Data Clearinghouse and Ms. Diep Nguyen is the principal programmer for Clearinghouse database development. Eric Kramer is another member of the Clearinghouse professional staff and Robert Wells is a Research Associate working with the Policy & Programs team. The Shimberg Center's website and the Florida

Housing Data Clearinghouse website are both maintained by Ignacio Paz Posse. The Shimberg Center also supports two doctoral students: Patricia Roset-Zuppa and Marta Strambi-Kramer and three Master degree students: Teresa Russin, Mauricio Ruiz, and Amanda Montgomery.

# APPENDIX A

## List of Publications

### *Affordable Housing ISSUES* Newsletter

**2007**

Oct New Rules for Roof Covering Replacement
Aug American Community Survey & Assisted Housing Parameters
Jun Foreclosure Prevention
Apr Belmont Heights Estates: A Success Story
Feb Housing Affordability Index in Florida

**2006**

Dec Energy Efficiency of New Homes
Oct Florida's Commitment to Preservation of Affordable Housing
Aug The Shimberg Center for Affordable Housing
Jun Hurricane Resistant Homes
Apr Belmont Heights Estates: A HOPE VI Success Story
Feb Housing Affordability Index in Florida

**2005**

Dec Creating Affordable Housing Demand
Oct Employer Assisted Housing
Aug Workforce Housing
Jun State if Florida's Housing - 2004
Apr Individual Development Accounts
Feb Building Green Buildings

**2004**

Dec Florida's Public Housing Authorities
Oct Manufactured Housing & Hurricanes
Aug Impact of Construction & Real Estate on Florida's Economy – Update for 2004
Jun Pressure Treated Lumber
Apr Low-Impact Development
Feb Measuring Housing Affordability in Florida

**2003**

Dec Smart Growth Principles
Oct New Office Location
Aug Florida's Single-family Housing Supply
Jun Impact of Construction & Real Estate on Florida's Economy
Apr Predatory Lending
Feb Top Ten State & Local Strategies to Increase Affordable Housing Supply

**2002**

Dec Measuring Sprawl & Its Impact
Oct Mold
Aug The State of Florida's Housing, 2002
Jun Local Economic Contribution of Home Building
Apr Exemption from Ad Valorem Taxation for Affordable Housing
Feb Assessing Outcomes

**2001**

Dec Community Land Trust

**2000**

Oct 13th Annual Statewide Housing Conf.
Aug Three HUD Housing Programs
Jun The State of Florida's Housing, 2000
Apr Social Benefit & Cost of Homeownership
Feb Rehabilitation Subcode

**1999**

Dec Design Matters in Affordable Housing
Oct Rental Property Management
Aug Rental Housing Affordability Gap
Jun HUD Community Builder Program
Apr 21st Century Housing Symposium
Feb Regional Training & Demonstration Centers

**1998**

Dec Affordable Housing Alternatives
Oct Affordable Housing Through Historic Preservation
Aug Florida Housing Data Center
Jun The Positive Effect of Homeownership
Apr Hidden Cost of Inadequate Housing
Feb Community Builders Fellowship

**1997**

Dec Local Economic Contribution of Home Building
Oct A Program for Youth at Risk
Aug Housing Assistance in Florida
Jun Affordable Housing Research Needs in Florida
Apr Fannie Mae Trillion Dollar Commitment
Feb Comprehensive Homeownership Assistance Program

**1996**

Dec Estimating Affordable Housing Need
Oct Resident Economic Development Initiative
Aug Rural Development Strategic Plan
Jun Shimberg Center Home Page
Apr 1996 Summer Housing Institute
Feb There Goes the Neighborhood?

**1995**

Dec Florida Housing Coalition: At Work for Affordable Housing

| | |
|---|---|
| Oct | Affordable Housing Auction |
| Aug | Technical Assistance Providers |
| Jun | One-stop Permitting Process |
| Apr | Defensible Space |
| Feb | Summer Housing Institute 1995 |
| | **1994** |
| Dec | A Visit to Age-Sensitive Housing |
| Oct | Sustaining Housing Affordability |
| Aug | Alternative Residential Building Systems |
| Jun | Public/Private Partnership for Affordable Housing |
| Apr | Affordability After Occupancy |
| Feb | Housing Trends |
| | **1993** |
| Dec | Impact Fee Exemption for Affordable Housing in Florida |
| Oct | Low- and Moderate Income Lending Experiences |
| Aug | Density Bonuses for Affordable Housing in Florida |
| Jun | Affordable Housing Advisory Committee |
| Apr | Homeownership Training |
| Feb | Employer Assisted Housing |
| | **1992** |
| Dec | State Housing Initiatives Partnership |
| Oct | Affordable Housing Indexes – An Overview |
| Aug | Sadowski Affordable Housing Act |
| Jun | Inclusionary Affordable Housing |
| Apr | Jobs/Housing Balance |
| Feb | Single-Room Occupancy (SRO) |
| | **1991** |
| Dec | Understanding and Neutralizing NIMBYism |
| Oct | Impact Fees and Affordable Housing |
| (Spec) | Shimberg Commits $1 Million to Housing Center |
| Aug | Housing Price Impact of Affordable Housing |
| Jun | The Low Income Housing Tax Credit |
| Apr | Subsidized Housing Inventory |
| Feb | Cost Reducing land Development Guidelines |
| | **1990** |
| Dec | Mutual Housing Associations |
| Oct | Financing Schemes |
| Aug | Technical Resources |
| Jun | Keys to Success for Community-based Development |
| Apr | Affordable Housing Organizations in Florida |
| Feb | SUS Housing Related Research |
| | **1989** |
| Dec | Introduction to the Center |

## Technical Note Series

| | |
|---|---|
| #03-5 | Energy Related Characteristics of Multi-family Housing Construction in Florida - 2003 |
| #03-4 | Impact of Real Estate on the Alachua County Economy |
| #03-3 | Energy Related Characteristics of New Home Construction - 2003 |
| #03-2 | Public Housing Authorities: An Analysis of Practices & Resources for Serving Disabled Persons |
| #03-1 | Impact of Real Estate on the Florida Economy – Update for 2003 |
| #02-2 | Impact of Real Estate on the Florida Economy – Update for 2002 |
| #02-1 | Energy-Related Characteristics of New Home Construction in Florida (Revised) |
| #01-4 | County Locations of Frail, Low-income Older Persons in Need of Affordable Assisted Living in Florida |
| #01-2 | The Low-Income Housing Tax Credit & Multi-family Bond Financing: A Comparison of State-level Allocation Policies |
| #01-1 | Inclusionary Housing – A Discussion of Policy Issues |
| #00-2 | Alternative Residential Building Systems – Second Edition |
| #00-1 | Affordable Housing in Florida, 1999 |
| #99-1 | Migrant Farmworker Housing Needs Assessment Methodology |

#98-1 Affordable Housing in Florida - 1998

#97-1 Affordable Housing in Florida - 1997

#95-3 Technical Assistance Resources: Organizations and Publications

#95-2 A Cost Comparison Study Between Steel and Wood Residential Framing Systems

#95-1 *Affordable Housing ISSUES*: 1989 - 1995

#94-4 Bridge Builders: Community Development Intermediary Systems in the United States

#94-3 Demographics, Technology, and the Future of Housing: Preparing for the 21st Century

#94-2 Manufactured Housing in Florida

#94-1 Alternative Residential Construction Systems

#93-1 Impact Fee Usage in Florida

#92-1 Effects of Growth Controls on Housing Prices: A Review of Literature

## Research Reports

#93-3 Inclusionary Housing & Density Bonuses for Affordable Housing in Florida: A Survey of Performance

#93-2 Growth Management and Housing

#93-1 Design of Flexible Homes the Contain Future Expansion Capabilities

#92-1 A Layman's Guide to Low-income Housing Tax Credits in Florida