

**Collier County
Affordable Housing Advisory Committee (AHAC)**



AGENDA

Growth Management Community Development Department
Conference Rooms 609/610
2800 N. Horseshoe Dr., Naples, FL 34104

January 17th, 2023, 8:30 A.M.

AHAC MEMBERS

Joe Trachtenberg, Chair
Steve Hruby, Member
Mary Waller, Member
John Harney, Member
Jennifer Faron, Member
Gary Hains, Member

Commissioner Chris Hall, Member
Jessica Brinkert, Member
Arol Buntzman, Member
Todd Lyon, Member
Paul Shea, Member

COLLIER COUNTY STAFF

Michael Bosi, Director, Planning & Zoning
Cormac Giblin, Interim Director, Economic Development and Housing
Julie Chardon, Operations Coordinator, CHS
Chris Montolio, Operations Analyst, Economic Development & Housing
Kelly Green, Accountant, Economic Development & Housing

NOTE: ALL PERSONS WISHING TO SPEAK ON ANY AGENDA ITEM MUST REGISTER PRIOR TO SPEAKING. ALL REGISTERED SPEAKERS WILL RECEIVE UP TO THREE (3) MINUTES UNLESS THE TIME IS ADJUSTED BY THE CHAIRMAN. DURING COMMITTEE DISCUSSION, COMMITTEE MEMBERS MAY ASK DIRECT QUESTIONS TO INDIVIDUALS. PLEASE WAIT TO BE RECOGNIZED BY THE CHAIRMAN AND STATE YOUR NAME AND AFFILIATION FOR THE RECORD BEFORE COMMENTING.

IF YOU ARE A PERSON WITH A DISABILITY WHO NEEDS ACCOMMODATION IN ORDER TO PARTICIPATE IN THIS MEETING, YOU ARE ENTITLED, AT NO COST TO YOU, THE PROVISION OF CERTAIN ASSISTANCE. PLEASE CONTACT THE COLLIER COUNTY FACILITIES MANAGEMENT DEPARTMENT. ASSISTED LISTENING DEVICES FOR THE HEARING IMPAIRED ARE AVAILABLE IN THE COUNTY COMMISSIONER'S OFFICE.

- 1. CALL TO ORDER & PLEDGE OF ALLEGIANCE**
- 2. ROLL CALL OF COMMITTEE MEMBERS AND STAFF**
- 3. APPROVAL OF AGENDA AND MINUTES**
 - a. Approval of today's agenda
 - b. Approval of December 20th, 2022, AHAC meeting minutes
 - c. 2023 AHAC Chair and Vice Chair nominations and vote
- 4. INFORMATIONAL ITEMS AND PRESENTATION**
 - a. Staffing Changes
 - b. 2023 January Apartment Survey
- 5. PUBLIC COMMENT**
 - a. Persons wishing to speak must register prior to speaking. All registered speakers will receive up to three (3) minutes unless the time is adjusted by the Chairman.
- 6. DISCUSSION ITEMS**
 - a. AHAC Bylaws/ Ad-Hoc Committee
 - b. Update on Surtax Funding/ Developer Requests
 - c. Workshop Dates with Growth Management Staff
 - d. Housing Plan Recommendations - BCC Agenda Item request
- 7. STAFF AND COMMITTEE GENERAL COMMUNICATIONS**
- 8. NEW BUSINESS**
- 9. ADJOURN**
- 10. NEXT AHAC MEETING DATE AND LOCATION: February 21th, 2023, 8:30 A.M. at Conference Room 609/610- Growth Management Department**

MINUTES OF
THE COLLIER COUNTY
AFFORDABLE HOUSING ADVISORY COMMITTEE

December 20th, 2022
8:30 A.M.
Naples, Florida

LET IT BE REMEMBERED that the Collier County Affordable Housing Advisory Committee met on this date at 8:30 A.M. in a *WORKING SESSION* in Conference Room 609/610 located at 2800 North Horseshoe Dr. Naples, FL 34104, with the following Members present:

Present: Mary Waller
John Harney
Joe Trachtenberg – Chair
Comm. Chris Hall
Paul Shea
Jennifer Faron
Arol Buntzman
Stephen Hruby

Excused: Gary Hains
Jessica Brinkert
Todd Lyon

Unexcused:

ALSO PRESENT:

Jacob LaRow, Director Economic Development and Housing Division- GMD
Michael Bosi, Director, Planning & Zoning
Jamie Cook, Director, Development Review
Donald Luciano, Manager Federal & State Grant Operations-CHS
Chris Montolio, Operations Analyst, Economic Development & Housing
Julie Chardon, Operations Support Specialist - CHS

OTHERS PRESENT; Louise Jarvis; Kelly Green, GMD; Michael Puchalla, HELP; Katerina Pelic, Clerks Office; Betty Schwartz; League of Women’s Voters; Ted Blankenship, City of Naples; Chris Watson, GMD; Michael Dalby, Naples Chamber of Commerce, Samantha Roesler; Gulf Shore Business.

1. CALL TO ORDER

Joe Trachtenberg called the meeting to order at 8:30 a.m. He read the procedures which was followed by the Pledge of Allegiance.

2. ROLL CALL – COMMITTEE MEMBERS AND STAFF

Julie Chardon led with Roll Call.

There were 7 active members present when the meeting, therefore a quorum was established.

One member (Commissioner Chris Hall) arrived at 8:46 am bringing the final total to 8 members present.

3. APPROVAL OF AGENDA AND MINUTES

- a. Joe Trachtenberg made a motion to approve the agenda. The motion was seconded by John Harney. The motion passed by a vote of 7-0.
- b. A motion was made by Joe Trachtenberg to approve the minutes from the November 15th, 2022, meeting of and was seconded by Steve Hruby.
- c. A Motion to amend the minutes was requested by Mary Waller. Wanted to include the list of properties that has been requested in previous meetings. Joe Trachtenberg seconded; Motion passed 7-0.

4. INFORMATIONAL ITEMS AND PRESENTATION

- a. AHAC Incentives- Mike Bosi addressed AHAC on what he believes are the key components AHAC should be focusing on. Four initiatives were brought up that were part of a housing plan created more than five years ago but has had no clear structure on how they should be developed. The first initiative is an increase in housing units within the county's activity centers from 16 units per acre to 25 for affordable housing projects, the second is the process of converting commercial zones to residential to not require a public hearing, the third involves providing developers incentives to build along transit lines near major traffic arteries, and lastly focusing on strategic opportunity sites near big corporate companies which could benefit from having multifamily units near their campuses. Out of these four initiatives that need to get brought before the BCC, Mike Bosi feels the one with the most benefit for affordable housing is the increase in housing units within the county's activity centers from 16 units per acre to 25 for affordable housing projects. Due to the nature of developers building out and a shift to more online shopping, the 22 activity centers designated in the county to be shopping centers can be relooked at. Increasing to 25 units which would only be a four-story building can help incentivizes private developers. Mike Bosi asked if Chris Hall, at the January 10th BCC Meeting, can address the commissioners on when they can have a discussion of the four initiatives. Joe Trachtenberg wanted to provide an unpaid advertisement to a forum that is taking place on January 11th, 2023. Major city organizations such as the Sheriff's office, Naples Daily

news, and Arthrex will be voicing their concerns on the Affordable Housing crisis going on in our community.

Jacob LaRow provided the email to the committee that he had previously sent. This email contained the Vacant Property list and links to maps that show what could happen if the four initiatives were adopted.

Joe Trachtenberg brought up difficulties trying to get the board to look at the McDowell Housing Project that was presented at the November 15th AHAC Meeting. He wants to get county staff started on looking at a process on how to develop the 20 million surtax funding that lacks structure. Mike Bosi clarified that the 20 million needs to be spent on land and wants to know what's the land acquisition strategy. Jamie French and staff are in the beginning stages but noted how can we identify the right acquisition process? And how much jeopardy will be caused having to rezone and present it to the BCC? Jacob LaRow brought up house bill 1339 that can provide affordable housing without rezones. There will be more conversations with this topic on further development of this process.

Chris Hall wants to get something done and has been listening to both sides of the stories. He wants viable options and viable solutions presented to the BCC. Chris Hall expressed how he knows about the struggles of long commutes because he too couldn't afford to live close to where he worked and wants to help Collier County.

Joe Trachtenberg and Mary Waller would like if Jamie French and Mike Bosi come back to next months AHAC and propose some rules on how the 20 million should be utilized and call for proposals to see projects.

AHAC Charter- Joe Trachtenberg presented an item in the beginning of the meeting on creating a charter for AHAC. He will bring this item up at the January 17th, 2023, meeting but asked Julie Chardon to reach out to the Housing Alliance group and get sample charters from other AHAC to have available for the next meeting. At our next AHAC meeting Joe Trachtenberg will appoint an AHAC Committee.

Mike Bosi notified AHAC that Jacob LaRow is leaving the county and that this will be his last meeting. Joe Trachtenberg and AHAC members thanked him for all his efforts and for all that he did for the Committee.

5. PUBLIC COMMENT

- a. Michael Puchalla- Executive Director with Collier County Community Land Trust and with HELP. HELP is a local nonprofit organization that help individuals gain housing. He just wanted to make a quick note that he is here to be part of the solution and make sure with acquiring land and working with developers the land that's slated to be affordable doesn't get phased out. He tasked himself with

creating an income certification process that builders can come forward and utilize. He will share the Income Certification process with the group.

6. DISCUSSION ITEMS

- a. 2023 AHAC Calendar- Joe Trachtenberg questioned if a vote should be taken to have the next meeting be for New Member Orientation or have a separate meeting for it. He wants to include staff from Growth Management and AHAC members. Joe Trachtenberg asked Mike Bosi to propose an orientation schedule with what AHAC should know from GMD and what members who should be there. Mike Bosi did advise the meeting may take place in late January into February. It was agreed that the January meeting will be a regular working meeting and a separate orientation meeting will be held later.
- b. 2023 Grant Cycle Update- Donald Luciano, Federal and State manager for CHS gave an update on the two Grant Cycles. They're finishing up one cycle and have new HOME-ARP funding which has five applicants with seven projects. One of the included projects is the Rural Neighborhoods Golf Course (\$2.3 million). For 2023, CHS just sent their new application to their software vendor and will have the applications opened on January 10th. Looking towards the first week of March after the process has been done to have projects listed for the 2023 cycle.

7. STAFF AND GENERAL COMMUNICATIONS

- a. Update on Rural Neighborhoods Golf Course- Jennifer Faron requested an update on the progress of the project. She noted its rare to see a non-for profit handle a project of this size, usually it's for profit. Jacob LaRow clarified that Steve Kirk is awaiting more funds that will make its way to the BCC in February/ March. Jamie Cook gave an update on issues that County staff are working on. Since land was previously a golf course, they are making sure the land is not contaminated due to chemicals used in the past. GMD staff is also awaiting a site development plan from the developers.

Jennifer Faron questioned if we picked the right developer since large amounts of money has been donated and invested in this process and no plan has come forward from the developer.

Steve Hruby mentioned a Non-Profit developer was used due to fact a for-profit developer would potentially take advantage of making a profit. Jennifer Faron brought up looking into the 990's of some largest Non-for Profits housing developers.

Donald Luciano will follow up with Steve Kirk to see if they can get the site development plan moving.

8. ADJOURN

There being no further business for the good of the County, the meeting was adjourned at 10:50 a.m.

NEXT MEETING: THE NEXT REGULARLY SCHEDULED MEETING WILL BE HELD ON THE THIRD TUESDAY ON JANUARY 17TH, 2023, AT 8:30 A.M.

Location: Conference Room 609/610-Growth Management Department 2800 N. Horseshoe

**COLLIER COUNTY AFFORDABLE HOUSING ADVISORY
COMMITTEE**

Joe Trachtenberg, Chairman

The foregoing Minutes were approved by Committee Chair on _____, 2023, "*as submitted*" **OR** "*as amended*" .

**Collier County Community and Human Services Division
Quarterly Rental Apartment Inventory Survey January, 2023**

Information deemed reliable but should be independently verified

Very Low Income (VLI): Means a household earning between 30% and 50% of the Area Median Income
 Low Income (LI): Means a household earning between 50% and 80% of the Area Median Income
 Moderate Income (MI): Means a household earning between 80 and 120% of the Area Median Income

Property Name	Property Address	Phone #	1/1 Rental Rate	2/2 Rental Rate	3/2 Rental Rate	Total # of Units in Development	Occupancy Rate	Total Available Units as of Jan 1st, 2023	January 2023	October 2022	July 2022	April 2022	January 2022	October 2021	July 2021	April 2021	Oct 2020	July 2020	April 2020	Jan 2020	Oct 2019
									Very Low Income \$1065 2/2	Very Low Income \$1065 2/2	Very Low Income \$1065 2/2	Very Low Income \$1065 2/2	Very Low Income \$1065 2/2	Very Low Income \$1065 2/2	Very Low Income \$1065 2/2	Very Low Income \$1065 2/2	Very Low Income \$1065 2/2	Very Low Income \$1065 2/2	Very Low Income \$1065 2/2	Very Low Income \$1065 2/2	Very Low Income \$1065 2/2
Goodlette Arms	950 Goodlette Rd N Naples, FL - 34102	(239) 262-3229	\$925	N/A	N/A	242	100.0%	0													
Bear Creek	2367 Bear Creek Dr, Naples, FL 34109	(239) 514-0600	N/A	\$1,038	\$1,204	108	100.0%	0	0	12	0	0									
Whistler's Green	4700 Whistlers Green Cir, Naples, FL 34116	(239) 352-2999	\$998	\$1,189	\$1,368	168	100.0%	0													
Brittany Bay	14815 Triangle Bay Dr, Naples, FL 34119	(239) 354-2002	\$1019	\$1,198	\$1,375	392	100.0%	0													
Summer Lakes 1&2	5520 Jonquil Ln, Naples, FL 34109	(833) 290-3367	\$1066	\$1,200	\$1,487	416	100.0%	0													
Saddlebrook Village	8685 Saddlebrook Cir, Naples, FL 34104	(239) 354-1122	N/A	\$1,218	\$1,338	140	100.0%	0													
Windsong Club	11086 Windsong Cir, Naples, FL 34109	(239) 566-8801	\$1050	\$1,263	\$1,458	120	100.0%	0													
Jasmine Cay	100 Jasmine Circle Naples, FL - 34102	(239) 963-9920	N/A	\$1,266	\$1,463	73	100.0%	0													
Osprey's Landing	100 Osprey's Landing, Naples, FL 34104	(239) 261-5454	\$1055	\$1,267	\$1,467	176	100.0%	0													
Villas of Capri	7725 Tara Cir, Naples, FL 34104	(239) 455-4600	\$1054	\$1,271	\$1,468	235	100.0%	0													
Whistler's Cove	11400 Whistlers Cove Blvd, Naples, FL 34113	(239) 417-3333	\$1056	\$1,271	\$1,476	240	100.0%	0													
College Park	6450 College Park Cir, Naples, FL 34113	(833) 219-9964	N/A	\$1,278	\$1,482	210	100.0%	0													
Noah's Landing	10555 Noah's Cir, Naples, FL 34116	(239) 775-7115	\$1055	\$1,268	\$1,465	264	100.0%	0	Low Income	Low Income	Low Income	Low Income	Low Income	Low Income	Low Income	Low Income	Low Income	Low Income	Low Income	Low Income	Low Income
Tuscan Isle	8650 Weir Dr, Naples, FL 34104	(239) 304-3668	\$1064	\$1,279	\$1,452	298	100.0%	0	0	1	2	2	3	9	23	105	313	119	102	84	135
George Carver Apts	350 10th St N Naples, FL - 34102	(239) 261-4595	\$1224	\$1,450	\$1,746	70	100.0%	0													
Laurel Ridge	5460 Laurel Ridge Ln, Naples, FL 34116	(239) 353-7766	N/A	N/A	\$1,404	78	100.0%	0	\$1698/2	\$1698/2	\$1698/2	1698/2	1482/2	1482/2	\$1482/2	\$1482 2/2	\$1482 2/3	\$1482 2/4	\$1482 2/5	\$1482 2/6	\$1482 2/7
Wild Pines Naples 1&2	2580 Wild Pines Ln, Naples, FL 34112	(239) 793-6419	\$1,706	N/A	N/A	200	100.0%	0													
Naples 701	3531 Plantation Way, Naples, FL 34112	(239) 775-8000	\$1,300	N/A	N/A	188	100.0%	0													
Oasis Naples	2277 Arbor Walk Cir, Naples, FL 34109	(239) 598-9944	\$1545	\$1,755	N/A	216	100.0%	0													
Jade at Old Naples	402 11th St N, Naples, FL 34102	(239)213-5888	\$1,400	\$1,800	N/A	104	100.0%	0													
Gordon River Apartments (Still Water)	1400 5th Ave N, Naples, FL 34102	(239)263-7700	N/A	\$1,850	\$2,050	96	100%	0													
Naples Place I-III	4544-4626 Sunset Rd, Naples, FL 34116	(239) 450-9126	\$1,200	\$1,900	\$2,350	170	100.0%	0													
Briar Landings	1385 Wildwood Lakes Blvd, Naples, FL 34104	(239) 455-2400	\$1,700	\$2,000	N/A	240	100.0%	0													
Belvedere At Quail Run	260 Quail Forest Blvd, Naples, FL 34105	(239) 434-0033	\$1,990	\$2,075	N/A	162	100.0%	0													
The Coast (Berkshire Lakes)	3536 Winifred Row Ln, Naples, FL 34116	(239) 455-8174	N/A	N/A	\$2,820	146	95.2%	7													
10x Living (Alvista at Laguna Bay)	2602 Fountainview Cir, Naples, FL 34109	(239) 254-7889	\$2,039	\$2,304	N/A	456	98.5%	7													
The Point at Naples (Heron Park)	2155 Great Blue Dr, Naples, FL 34112	(239) 417-5500	\$1,945	\$2,350	\$2,639	248	100.0%	0													
River Reach	1970 River Reach Dr #179, Naples, FL 34104	(239) 643-2992	\$1,938	\$2,359	N/A	556	98.9%	6													
Advenir Aventine	9300 Marino Cir, Naples, FL 34114	(239) 793-4603	\$1,895	\$2,375	\$2,805	350	95.4%	16	Moderate Income/ \$2547 2/2	Moderate Income/ \$2547 2/2	Moderate Income/ \$2547 2/2	Moderate Income/ \$2547 2/2	Moderate Income/ \$2223 2/2	Moderate Income/	Moderate Income/	Moderate Income/	Moderate Income/	Moderate Income/	Moderate Income/	Moderate Income/	Moderate Income/
Alvista at Golden Gate/Sabal Key	1600 Wellesley Cir, Naples, FL 34116	(239) 353-1211	\$1,850	\$2,380	N/A	200	99.5%	1													
Meadow Lakes	105 Manor Blvd, Naples, FL 34104	(239) 403-4130	\$1,984	\$2,381	\$2,716	252	90.9%	23	100	210	365	158	4								
Mer Soleil	4250 Jefferson Ln, Naples, FL 34116	(239) 354-1155	\$1,750	\$2,399	N/A	320	100.0%	0													
Waverley Place	5300 Hemingway Ln, Naples, FL 34116	(239) 353-4300	\$1,800	\$2,403	\$2,900	300	100%	1													
Somerset Palms	15985 Arbor View Blvd, Naples, FL 34110	(888) 479-3911	N/A	\$2,423	\$3,140	169	91.1%	15													
Inspira Apartments	7425 Inspira Circle, Naples, FL 34113	(239) 298-5680	\$2,275	\$2,425	\$3,563	304	96.1%	12													
Bermuda Island	3320 Bermuda Isle Cir., Naples, FL 34109	(888) 415-1140	\$1,960	\$2,450	\$2,890	360	96.9%	11													
Malibu Lakes	2115 Malibu Lakes Circle, Naples, FL 34119	(239) 596-0035	\$2,190	\$2,475	\$3,225	356	99.7%	1													
Legacy Naples Apartments	7557 Campania Way, Naples, FL 34104	(239) 354-7417	\$2,162	\$2,641	\$3,575	304	95.4%	14													
Meadow Brook Preserve	1130 Turtle Creek Blvd, Naples, FL 34110	(239) 514-4449	\$2,025	\$2,675	\$3,000	268	98.9%	3													
Sierra Grande at Naples	6975 Sierra Club Cir, Naples, FL 34113	(239) 529-5631	\$2,515	\$2,684	\$3,279	300	97.3%	8													
Milano Lakes	3713 Milano Lakes Circle, Naples, FL 34114	(239) 558-1534	\$2,352	\$2,705	\$3,916	296	95.6%	13													
Edge 75	120 Bedzel Cir, Naples, FL 34104	(239) 276-7770	\$2,260	\$2,775	\$3,675	320	70.0%	7													
The Crest	11496 Summer Grove Cir Naples, FL 34113	(239)963-1209	\$2,407	\$2,796	\$3,581	200	96.5%	7													
Atrium Gulfshore	5301 Summerwind Dr, Naples, FL 34109	(239) 597-6605	\$2,606	\$2,845	N/A	368	98.9%	4													
Aster at Lely Resort	8120 Acacia St, Naples, FL 34113	(239) 919-8375	\$2,197	\$2,868	\$2,900	308	97.4%	8													
Addison Place	8677 Addison Place Circle, 34119	(239) 963-8937	\$2,558	\$2,923	\$3,554	294	99.0%	3													
Orchid Run	10991 Lost Lake Drive, Naples, FL 34105	(833) 676-4450	\$2,035	\$3,204	\$3,376	282	97.9%	6													

**Collier County Community and Human Services Division
Quarterly Rental Apartment Inventory Survey January, 2023**

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The Pearl (Founders Square)	8820 Walter Way Naples, FL 34120	(239)-294-8985	\$2,304	\$3,244	\$4,259	400	96.5%	14													
Lago Apartments	10200 Sweetgrass Circle, Naples, FL 34104	(239)384-6881	\$2,429	\$3,255	\$3,782	320	96.3%	12													
Allura	16210 Allura Circle, Naples FL 34110	(239) 788-2641	\$2,387	\$3,264	\$4,174	304	99.3%	2													
The Springs at Hammock Cove	4360 Petal Dr, Naples, FL 34112	(239) 203-9072	\$2,431	\$3,280	\$3,529	340	92.4%	26	439	418	761	356	87	61	79						
Mark Lane Apartments	15500 Mark Lane, Naples FL 34119	(239) 631-9325	\$2,334	\$3,310	\$4,110	286	94.8%	15													
Marea	3550 Putney Court, Naples FL 34112	(239) 944-7080	\$2,463	\$3,382	\$4,100	300	2.7%	292													
Magnolia Square	5934 Premier Way Suite 2100, Naples FL 34109	(239) 932-6899	\$2,700	\$3,600	\$4,000	290	98.3%	5													
Sub-Total Naples	Median	Median	\$1,953	\$2,380	\$2,855	13,803	98.3%	539	439	641	1,128	519	98	89	331	529	811	700	546	570	788
Farm Worker Village (non-farmworker)	2225 Chadwick Cir, Immokalee, FL 34142	(239) 842-0327	\$520	\$570	\$600	276	98%	5													
Sanders Pines	2449 Sanders Pine Cir, Immokalee, FL 34142	(239) 657-8333	N/A	\$650	\$795	41	100.0%	0													
Bromelia Place	612 N 11th St Immokalee, FL - 34142	(844) 796-3474	\$575	\$675	N/A	30	100.0%	0													
Esparanza place	210 S 1st St, Immokalee, FL 34142	(239) 657-2009	\$600	\$690	\$750	47	100.0%	0													
Main Street Village	104 Anhinga Cir, Immokalee, FL 34142	(239) 657-6576	N/A	\$705	\$775	79	100.0%	0													
Willowbrook Place	1836 Ash Ln, Immokalee, FL 34142	(239) 657-3204	\$634	\$717	N/A	41	100.0%	0													
Heritage Villas	1810 Lake Trafford Rd, Immokalee, FL 34142	(239) 657-3204	\$665	\$772	N/A	41	100.0%	0	Very Low Income	Very Low Income	Very Low Income	Very Low Income	Very Low Income	Very Low Income	Very Low Income	Very Low Income	Very Low Income	Very Low Income	Very Low Income	Very Low Income	Very Low Income
Summer Glenn	1012 Summer Glen Blvd, Immokalee, FL 34142	(239) 657-3204	\$644	\$790	N/A	45	100.0%	0													
Garden Lake	1050 Garden Lake Cir, Immokalee, FL 34142	(239) 657-3204	\$672	\$800	N/A	65	100.0%	0													
Eden Gardens 1&2	1375 Bowwood Drive, Immokalee, FL 34142	(239) 657-7900	N/A	\$880	\$945	92	100.0%	0													
Southern Villas	1802 Custer Ave, Immokalee, FL 34142	(239) 657-3204	\$824	\$985	\$1,180	35	100.0%	0													
Immokalee Apartments	601 W Delaware Ave, Immokalee, FL 34142	(239) 657-6185	N/A	\$1050	\$1185	100	100.0%	0													
Oak Haven	580 Oakhaven Cir, Immokalee, FL 34142	(239) 658-5920	N/A	\$1179	\$1348	160	100.0%	0													
Crestview Park 1&3	716 Crestview Dr, Immokalee, FL 34142	(877) 475-1665	N/A	\$1185	\$1,372	304	100.0%	0													
Cypress Run	550 Hope Circle, Imokalee, FL 34142	(239) 657-9032	\$753	N/A	N/A	39	100.0%	0													
Timber Ridge	2711 Wilton Ct, Immokalee, FL 34142	(239) 657-8333	N/A	\$795	\$795	35	100.0%	0													
									0	0	0	0	0	6	6	7	12	33	9	12	10
									\$1698/2	\$1698/2	\$1698/2	1698/2	\$1482 2/2	\$1482 2/2	\$1482 2/2	\$1482 2/2	\$1482 2/2	\$1482 2/2	\$1482 2/2	\$1410 2/2	\$1410 2/2
Sub-Total Immokalee	Median	Median	\$644	\$781	\$870	916	99.5%	5	5	14	9	0	0	6	36	40	30	43	29	45	54
Grand Total	Median	Median	\$1,825	\$1,950	\$2,495	14,719	99.5%	544	544	655	1137	519	98	95	367	569	841	743	575	615	842

January 2023

of properties in Income Category

% Change in Median 1 bedroom

% Change in Median 2 bedroom

% Change in Median 3 - Bedroom

Naples	# of properties in Income Category			% Change in Median 1 bedroom			% Change in Median 2 bedroom			% Change in Median 3 - Bedroom						
	1- Bed	2 - Bed	3 - Bed	Current Report	Prior Report	Prior Qtr.	Prior Year	Current Qtr.	Prior Report	Prior Report	Current Qtr.	Prior Report	Prior Report	Current Qtr.	Prior Report	Prior Report
Median - ELI	Jan-23	22-Oct	Jul-22	Oct-21	Jan-23	Oct-22	Oct-22	Jan-23	Oct-22	Oct-22	Jan-23	Oct-22	Oct-22	Jan-23	Oct-22	Oct-22
Median - VLI	\$925.00	\$1,038.00	\$1,204.00	2	3	5	0	\$925.00	\$925.00	0%	\$1,038.00	\$927.50	\$0.12	\$1,204.00	\$1,202.50	0.12%
Median - LI	\$1,055.50	\$1,267.00	\$1,464.00	16	15	14	23	\$1,055.50	\$1,059.50	-0.38%	\$1,267.00	\$1,267.00	0.00%	\$1,464.00	\$1,476.00	-0.81%
Median - Moderate	\$1,916.50	\$2,367.00	\$2,820.00	19	24	24	17	\$1,916.50	\$1,955.00	2.76%	\$2,367.00	\$2,300.00	2.91%	\$2,820.00	\$2,909.00	-3.06%
Median - Market	\$2,387.00	\$2,923.00	\$3,628.00	17	11	9	10	\$2,387.00	\$2,241.00	8.50%	\$2,923.00	\$3,000.00	-2.57%	\$3,628.00	\$4,000.00	-9.30%
Median -	\$1,486.00	\$1,817.00	\$2,142.00													
Total				54	53	52	50									

Immokalee							
Median - ELI	1- Bed	2 - Bed	3 - Bed	Current Report	Prior Report	Prior Qtr.	Prior Year
Median - VLI	23-Jan	22-Oct	22-Jul	21-Oct			
Median - VLI	\$ 644.00			16	16	16	15
Median - LI				0	0		1
Median - Moderate				0	0		
Median - Market				0	0		
				16	16	16	16
Total						68	66

Very Low-Income (VLI): Means a household earning between 30% and 50% of the Area Median Income
 Low-Income (LI): Means a household earning between 50% and 80% of the Area Median Income
 Moderate Income (MI): Means a household earning between 80 and 120% of the Area Median Income



Affordable Housing Incentive Strategies

EXPEDITED

**A Guidebook for
Affordable Housing
Advisory Committee
Members and Local
Government Staff**



we make housing affordable™
Florida Housing
Finance Corporation

III. Affordable Housing Advisory Committee Overview

Affordable Housing Advisory Committee (AHAC)

A SHIP jurisdiction is statutorily required to assemble the initial Affordable Housing Advisory Committee when it first begins receiving SHIP funds. It is then required to annually convene the AHAC to review its earlier plan(s) and complete a Housing Incentive Strategies report that recommends affordable housing regulatory incentives to the local governing body. Jurisdictions receiving \$350,000 or less in SHIP funding are exempt from the annual review but still must complete an initial review.

The work of the AHAC is summarized in this excerpt from s. 420.9076(4) of the Florida Statutes:

“Annually, the advisory committee shall . . . recommend specific actions or initiatives to encourage or facilitate affordable housing while protecting the ability of the property to appreciate in value. The recommendations may include the modification or repeal of existing policies, procedures, ordinances, regulations, or plan provisions; the creation of exceptions applicable to affordable housing; or the adoption of new policies, procedures, regulations, ordinances, or plan provisions.”

Sec. 420.9076, Florida Statutes, outlines the AHAC requirements, including the deadlines for assembling a committee, considering specific incentive strategies, and submitting a report.

There are other tasks that AHAC members may undertake, but the information presented in this guidebook focuses on the AHAC’s primary responsibility, and only statutorily required task, to complete an annual Housing Incentive Strategies report.

Committee composition

Sec. 420.9076 (2), Florida Statutes, provides details on the AHAC committee composition. The AHAC must have at least eight and no more than eleven members representing at least six categories identified in the statute. Effective on October 1, 2020, each AHAC must have a locally elected official from each county or municipality participating in the SHIP program. The locally elected official must be a City or County Commissioner on the Commission responsible for implementing the recommendations. If an AHAC is consolidated to govern two or more SHIP jurisdictions, one elected official from any of the covered SHIP jurisdictions will meet this requirement, although it is a best practice to include one elected official from each represented local government. The elected official will count as a member of the AHAC for purposes of meeting the number of members requirement.

AHAC members should be appointed by the governing body of the local government, but do not have to be adopted by resolution. Representatives are to be selected from the following categories:

- (a) Citizen who is actively engaged in the residential home building industry in connection with affordable housing.
- (b) Citizen who is actively engaged in the banking or mortgage banking industry in connection with affordable housing.
- (c) Citizen who is a representative of those areas of labor actively engaged in home building in connection with affordable housing.
- (d) Citizen who is actively engaged as an advocate for low-income persons in connection with affordable housing.
- (e) Citizen who is actively engaged as a for-profit provider of affordable housing.
- (f) Citizen who is actively engaged as a not-for-profit provider of affordable housing.
- (g) Citizen who is actively engaged as a real estate professional in connection with affordable housing.
- (h) Citizen who actively serves on the local planning agency pursuant to Florida Statutes, Sec. 163.3174.
- (i) Citizen who resides within the jurisdiction of the local governing body making the appointments.
- (j) Citizen who represents employers within the jurisdiction.
- (k) Citizen who represents essential services personnel, as defined in the local housing assistance plan.

Some individuals might have the experience to represent more than one category, but they should only be counted in one category. For example, a committee member may have experience with both for-profit and non-profit housing development. However, that individual should be counted as the for-profit or the non-profit provider, not both.

The SHIP Statute describes each category as “a citizen.” The Statute is not explicit about whether this is a resident of the United States, a Florida resident, or resident of the city or county that the AHAC serves. However, an effort should be made to recruit representatives who reside in the applicable city or county. The AHAC Report should document any representatives who work within the jurisdiction but reside elsewhere.

Builders, lenders, and realtors are often represented on the AHAC. Builders who may be interested in volunteering can be identified by contacting the local homebuilder’s association and realtors can be located by connecting with a local realtor association.

There is a distinction between a representative “engaged in residential home building industry” and a “representative of those areas of labor actively engaged in home building.” The first category can be filled by a local homebuilder executive or a staff member of a non-profit development agency like Habitat for Humanity. By contrast, “a representative of those

areas of labor actively engaged in home building” could include a rehabilitation contractor, a subcontractor, an engineer, or an architect.

An “advocate for low-income persons” could be a staff member of a local legal services office, a leader from a faith-based group involved with affordable housing, or a representative of a community service organization related to affordable housing. The local government will need to consider whether such a person is “actively engaged” as an advocate.

A “for-profit provider of affordable housing” may be an owner or property manager for a rental property financed with housing tax credits, the State Apartment Incentive Loan program (SAIL), or other housing subsidies. Alternatively, this may be the owner or manager of naturally occurring affordable housing units who offer rental housing at monthly rents that are affordable according to the SHIP rent limits chart.

Local government program staff

Local government program staff support the AHAC. First, staff must identify and recruit committee members. The SHIP administrator must invite potential committee members, document their eligibility, and request their participation in fulfilling the duties of the advisory committee. The local government staff must also educate the advisory committee members about their responsibilities. New committee members should receive the SHIP governing statute (Florida Statutes, Sec. 420.907-9079) as well as local planning documents and policies. Local government staff must also provide an orientation to the current incentive strategies being implemented by the jurisdiction and an overview of the reporting requirements of the advisory committee.

SHIP staff should collaborate with planning staff on land use, zoning policies, and practices, the applicable economic development department on how various policies affect affordable housing development, and other local government divisions that impact housing affordability. The SHIP Statute states that “the advisory committee shall be cooperatively staffed by the local government department or division having authority to administer local planning or housing programs to ensure an integrated approach to the work of the advisory committee.” Generally, staff in these positions have different areas of expertise. SHIP program administrators usually hold positions in housing and community development or neighborhood departments and have regulatory or program knowledge that is unique to those positions. Planning departments, alternatively, have staff with formal education in areas like urban planning, and have extensive knowledge of land use and zoning laws. Persons in the economic development department may have formal training on how local government policy affects the cost of housing. The majority of AHAC responsibilities fall more squarely within the planning, building, and growth management departments.

The AHAC must review the jurisdiction’s comprehensive plan and land development regulations and recommend actions to encourage the creation of affordable housing units. This role requires that staff have knowledge of land use issues so the committee can consider

potential barriers to the development of affordable housing and recommend regulatory reforms to overcome the barriers. The AHAC presents an opportunity for multiple local government departments to collaborate and meet the jurisdiction's responsibility to provide housing for all its residents.

Prior to a revision of the SHIP statute in July 2016, the AHAC was required to have a member from each of the eleven categories identified above. Therefore, if the jurisdiction was in compliance, there was always a representative knowledgeable about the local planning process. With the change to the statute, local governments can now choose committee representatives from six other categories. Although no longer required by the SHIP Statute, local governments should consider including staff from the planning department as committee members. This SHIP Statute suggests participation from "a citizen who actively serves on the local planning agency", but it also notes that "if the local planning agency is comprised of the governing board of the county or municipality, the governing board may appoint a designee who is knowledgeable in the local planning process." This is good justification for arranging for a planner to assist the SHIP administrative staff in providing support to the AHAC and monitoring the actions of the committee to ensure adherence to all program requirements.

Roles and responsibilities of the AHAC

SHIP Statute overview

Sec. 420.9076(4) of the Florida Statutes describes the process for developing the AHAC Report. The key role of the AHAC is to prepare the AHAC Report and evaluate its implementation annually. The AHAC Report identifies incentive strategies and recommendations for adoption by the local government. The recommendations should seek to remove regulatory barriers that limit the development or preservation of affordable housing or drive-up housing costs. The recommendations should also suggest policies that encourage the production of affordable housing.

To fulfill this task, the advisory committee must first review the local government's existing policies and procedures, ordinances, land development regulations, and the comprehensive plan. Then the committee recommends specific actions or initiatives to encourage affordable housing while protecting the ability of the property to appreciate in value.

Actions the advisory committee can take include:

- Modifying or repealing existing policies, procedures, regulations.
- Creating exceptions applicable to affordable housing.
- Adopting new policies or amendments to the local comprehensive plan and corresponding regulations, ordinances, and other policies.

Local government implementation

The advisory committee must approve the final AHAC Report by majority vote and submit it to the Florida Housing Finance Corporation (FHFC), the local government, and to the entity providing statewide training and technical assistance for the Affordable Housing Catalyst Program. Upon receipt of the AHAC Report, the local government has 90 days to amend its local housing assistance plan to incorporate the adopted incentive strategies it plans to implement. Only two strategies are required in the amended LHAP:

- Expedited permitting for affordable housing projects.
- An ongoing process for review, prior to their adoption, of any local policies, ordinances, regulations, and plan provisions that increase the cost of housing.

Frequently Asked Questions

This list of frequently asked questions is provided as a quick reference. In many cases, the topics referenced below are addressed in greater detail in other sections of this guide.

Question: How does the Sunshine Law apply to our SHIP advisory committees?

Answer: When dealing with advisory committees it is very important to keep in mind the requirements of Florida's open meetings laws. Any local government-appointed committee that is part of a fact-finding commission or any board or committee that has final decision-making authority is covered by these laws. There is a strong legislative and judicial presumption in favor of transparency. If you have any questions about these requirements, consult with your city attorney, county attorney, or other appropriate legal counsel.

Question: How does the Sunshine Law apply to the biannual, regional workshops?

Answer: Florida's Sunshine Law only applies to meetings or gatherings where two or more members of the same board or committee discuss some matter which will foreseeably come before that board for action. Since most local governments will only have one elected official present at the workshop, Sunshine Law will not be an issue for most jurisdictions. However, there are some local governments with a joint City/County AHAC that will have two or more elected officials present at the workshops. For these local governments, two or more elected officials from the same AHAC may not, under any circumstances, communicate with each other during the workshop. Out of an abundance of caution, all elected officials who are not required to but wish to attend the workshops can attend but will not be allowed to speak to avoid Sunshine Law concerns. The primary purpose of these workshops is to educate local elected officials on affordable housing best practices, not to make decisions, and the elected officials can raise information presented at the local, publicly noticed AHAC meetings.

Title XXX SOCIAL WELFARE

Chapter 420 HOUSING

SECTION 9076 Adoption of affordable housing incentive strategies; committees.

420.9076 Adoption of affordable housing incentive strategies; committees.—

(1) Each county or eligible municipality participating in the State Housing Initiatives Partnership Program, including a municipality receiving program funds through the county, or an eligible municipality must, within 12 months after the original adoption of the local housing assistance plan, amend the plan to include local housing incentive strategies as defined in s. 420.9071(18).

(2) The governing board of a county or municipality shall appoint the members of the affordable housing advisory committee. Pursuant to the terms of any interlocal agreement, a county and municipality may create and jointly appoint an advisory committee. The local action adopted pursuant to s. 420.9072 which creates the advisory committee and appoints the advisory committee members must name at least 8 but not more than 11 committee members and specify their terms. Effective October 1, 2020, the committee must consist of one locally elected official from each county or municipality participating in the State Housing Initiatives Partnership Program and one representative from at least six of the categories below:

- (a) A citizen who is actively engaged in the residential home building industry in connection with affordable housing.
- (b) A citizen who is actively engaged in the banking or mortgage banking industry in connection with affordable housing.
- (c) A citizen who is a representative of those areas of labor actively engaged in home building in connection with affordable housing.
- (d) A citizen who is actively engaged as an advocate for low-income persons in connection with affordable housing.
- (e) A citizen who is actively engaged as a for-profit provider of affordable housing.
- (f) A citizen who is actively engaged as a not-for-profit provider of affordable housing.
- (g) A citizen who is actively engaged as a real estate professional in connection with affordable housing.
- (h) A citizen who actively serves on the local planning agency pursuant to s. 163.3174. If the local planning agency is comprised of the governing board of the county or municipality, the governing board may appoint a designee who is knowledgeable in the local planning process.
- (i) A citizen who resides within the jurisdiction of the local governing body making the appointments.
- (j) A citizen who represents employers within the jurisdiction.

(k) A citizen who represents essential services personnel, as defined in the local housing assistance plan.

(3) All meetings of the advisory committee are public meetings, and all committee records are public records. Staff, administrative, and facility support to the advisory committee shall be provided by the appointing county or eligible municipality.

(4) Annually, the advisory committee shall review the established policies and procedures, ordinances, land development regulations, and adopted local government comprehensive plan of the appointing local government and shall recommend specific actions or initiatives to encourage or facilitate affordable housing while protecting the ability of the property to appreciate in value. The recommendations may include the modification or repeal of existing policies, procedures, ordinances, regulations, or plan provisions; the creation of exceptions applicable to affordable housing; or the adoption of new policies, procedures, regulations, ordinances, or plan provisions, including recommendations to amend the local government comprehensive plan and corresponding regulations, ordinances, and other policies. At a minimum, each advisory committee shall submit an annual report to the local governing body and to the entity providing statewide training and technical assistance for the Affordable Housing Catalyst Program which includes recommendations on the implementation of affordable housing incentives in the following areas:

(a) The processing of approvals of development orders or permits for affordable housing projects is expedited to a greater degree than other projects, as provided in s. 163.3177(6)(f)3.

(b) All allowable fee waivers provided for the development or construction of affordable housing.

(c) The allowance of flexibility in densities for affordable housing.

(d) The reservation of infrastructure capacity for housing for very-low-income persons, low-income persons, and moderate-income persons.

(e) Affordable accessory residential units.

(f) The reduction of parking and setback requirements for affordable housing.

(g) The allowance of flexible lot configurations, including zero-lot-line configurations for affordable housing.

(h) The modification of street requirements for affordable housing.

(i) The establishment of a process by which a local government considers, before adoption, policies, procedures, ordinances, regulations, or plan provisions that increase the cost of housing.

(j) The preparation of a printed inventory of locally owned public lands suitable for affordable housing.

(k) The support of development near transportation hubs and major employment centers and mixed-use developments.

The advisory committee recommendations may also include other affordable housing incentives identified by the advisory committee. Local governments that receive the minimum allocation under the State Housing Initiatives Partnership Program shall perform an initial review but may elect to not perform the annual review.

(5) The approval by the advisory committee of its local housing incentive strategies recommendations and its review of local government implementation of previously recommended strategies must be made by affirmative vote of a majority of the membership of the advisory committee taken at a public hearing. Notice of the time, date, and place of the public hearing of the advisory committee to adopt its evaluation and final local housing incentive strategies recommendations must be published in a newspaper of general paid circulation in the county. The notice must contain a short and concise summary of the evaluation and local housing incentives strategies recommendations to be considered by the advisory committee. The notice must state the public place where a copy of the evaluation and tentative advisory committee recommendations can be obtained by interested persons. The final report, evaluation, and recommendations shall be submitted to the corporation.

(6) Within 90 days after the date of receipt of the evaluation and local housing incentive strategies recommendations from the advisory committee, the governing body of the appointing local government shall adopt an amendment to its local housing assistance plan to incorporate the local housing incentive strategies it will implement within its jurisdiction. The amendment must include, at a minimum, the local housing incentive strategies required under s. 420.9071(18). The local government must consider the strategies specified in paragraphs (4)(a)-(k) as recommended by the advisory committee.

(7) The governing board of the county or the eligible municipality shall notify the corporation by certified mail of its adoption of an amendment of its local housing assistance plan to incorporate local housing incentive strategies. The notice must include a copy of the approved amended plan.

(a) If the corporation fails to receive timely the approved amended local housing assistance plan to incorporate local housing incentive strategies, a notice of termination of its share of the local housing distribution shall be sent by certified mail by the corporation to the affected county or eligible municipality. The notice of termination must specify a date of termination of the funding if the affected county or eligible municipality has not adopted an amended local housing assistance plan to incorporate local housing incentive strategies. If the county or the eligible municipality has not adopted an amended local housing assistance plan to incorporate local housing incentive strategies by the termination date specified in the notice of termination, the local distribution share terminates; and any uncommitted local distribution funds held by the affected county or eligible municipality in its local housing assistance trust fund shall be transferred to the Local Government Housing Trust Fund to the credit of the corporation to administer the local government housing program.

(b) If a county fails to timely adopt an amended local housing assistance plan to incorporate local housing incentive strategies but an eligible municipality receiving a local housing distribution pursuant to an interlocal agreement within the county does timely adopt an amended local housing assistance plan to incorporate local housing incentive strategies, the corporation, after issuance of a notice of termination, shall thereafter distribute directly to the participating eligible municipality its share calculated in the manner provided in s. 420.9073.

(c) Any county or eligible municipality whose local distribution share has been terminated may subsequently elect to receive directly its local distribution share by adopting an amended local housing assistance plan to incorporate local housing incentive strategies in the manner and according to the procedure provided in this section and by adopting an ordinance in the manner required in s. 420.9072.

(8) The advisory committee may perform other duties at the request of the local government, including:

(a) The provision of mentoring services to affordable housing partners including developers, banking institutions, employers, and others to identify available incentives, assist with applications for funding requests, and develop partnerships between various parties.

(b) The creation of best practices for the development of affordable housing in the community.

(9) The advisory committee shall be cooperatively staffed by the local government department or division having authority to administer local planning or housing programs to ensure an integrated approach to the work of the advisory committee.

(10) The locally elected official serving on an advisory committee, or a locally elected designee, must attend biannual regional workshops convened and administered under the Affordable Housing Catalyst Program as provided in s. 420.531(2). If the locally elected official or a locally elected designee fails to attend three consecutive regional workshops, the corporation may withhold funds pending the person's attendance at the next regularly scheduled biannual meeting.

History.—s. 32, ch. 92-317; s. 15, ch. 93-181; s. 38, ch. 97-167; s. 24, ch. 2006-69; s. 19, ch. 2007-198; s. 117, ch. 2008-4; s. 30, ch. 2009-96; s. 16, ch. 2011-15; s. 67, ch. 2011-139; s. 11, ch. 2016-210; s. 19, ch. 2020-27; s. 37, ch. 2021-51.

ORDINANCE NO. 2018- 21

AN ORDINANCE OF THE BOARD OF COUNTY COMMISSIONERS OF COLLIER COUNTY, FLORIDA, IMPOSING A COUNTYWIDE LOCAL GOVERNMENT INFRASTRUCTURE SURTAX OF ONE PERCENT (1%) ON ALL AUTHORIZED TAXABLE TRANSACTIONS OCCURRING WITHIN COLLIER COUNTY, AS AUTHORIZED BY SECTION 212.055(2), FLORIDA STATUTES, EFFECTIVE BEGINNING JANUARY 1, 2019, FOR A PERIOD OF UP TO SEVEN (7) YEARS OR UNTIL THE AGGREGATE FUNDS OF \$490,000,000 ARE COLLECTED, WHICHEVER IS SOONER; PROVIDING THAT THE IMPOSITION OF THE SURTAX SHALL BE CONTINGENT ON APPROVAL AT A COUNTYWIDE REFERENDUM; PROVIDING FOR A WEBPAGE WHICH DETAILS THE PROPOSED PROJECTS FOR THE PUBLIC; PROVIDING FOR DISTRIBUTION OF SURTAX REVENUES AMONG THE COUNTY AND THE MUNICIPALITIES WITHIN THE COUNTY; PROVIDING FOR CITIZEN OVERSIGHT; PROVIDING BALLOT LANGUAGE AND DIRECTING THE SUPERVISOR OF ELECTIONS TO HOLD A COUNTYWIDE PRECINCT REFERENDUM ELECTION ON NOVEMBER 6, 2018.

WHEREAS, Section 212.055(2), Florida Statutes, authorizes the Collier County Board of County Commissioners (“Board”) to impose a 1.0 percent (1%) local government infrastructure surtax (“Surtax”) upon transactions occurring within Collier County (“County”) which are taxable under Chapter 212, Florida Statutes; and

WHEREAS, a 1.0 percent (1%) Surtax would, under current State sales tax rates, result in a one cent (1¢) Surtax on each one dollar (\$1.00) sale as specifically provided by law and will be applied to each fractional part of one dollar accordingly; and

WHEREAS, the Surtax differs from the transactions subject to the State sales tax in that the local option sales tax base applies only to the first \$5,000 of the purchase price of an item of taxable personal property while the State sales tax applies to the entire purchase price regardless of amount, pursuant to Section 212.054(2)(b)(1), Florida Statutes; and

WHEREAS, the Surtax does not apply to certain groceries, medical products and supplies, fuel, and other specifically identified goods and services listed in Section 212.08, Florida Statutes; and

Attachment: Ordinance No 2018-21 last page rotated (7951 : Review of Responsibilities and Mission)

WHEREAS, the funds derived from the imposition of the Surtax shall be distributed to the County and the municipalities of the County (“Municipalities”), as set forth in Section 218.62, Florida Statutes, if no interlocal agreement is entered into; and

WHEREAS, funds received from the Surtax authorized by Section 212.055(2), Florida Statutes, may be utilized by the County and Municipalities to finance, plan, construct, reconstruct, renovate and improve needed infrastructure, as defined in Section 212.055(2)(d), Florida Statutes; and

WHEREAS, the County and the Municipalities are presently without sufficient fiscal and monetary resources to adequately fund their infrastructure needs; and

WHEREAS, adequate public infrastructure facilities of the types herein described promote the safe, efficient and uninterrupted provision of numerous essential public services provided by the County and the Municipalities, including but not limited to roads, bridges, signals, sidewalks, parks, evacuation shelters, governmental facilities, including emergency services facilities; acquiring land and construction for workforce housing and career and technical training, veterans’ nursing home and expand mental health facilities; and

WHEREAS, a brief description of the projects to be funded is set forth in the ballot language contained in this Ordinance and a more specific list of projects to be funded is attached hereto as Exhibit A; and

WHEREAS, the County and the Municipalities shall establish a citizen oversight committee to provide for citizen review of the expenditure of Surtax proceeds.

NOW, THEREFORE, BE IT ORDAINED by the Board of County Commissioners of Collier County, Florida, that:

SECTION ONE. Incorporation of Recitals.

The above recitals are true and correct and are hereby incorporated by reference.

Attachment: Ordinance No 2018-21 last page rotated (7951 : Review of Responsibilities and Mission)

SECTION TWO. Imposition of Local Government Infrastructure Surtax.

There is hereby imposed a one percent (1%) local government infrastructure surtax (“Surtax”) upon all authorized taxable transactions occurring within the County.

SECTION THREE. Administration, Collection and Distribution of Proceeds.

The Surtax shall be administered, collected, and enforced in accordance with the provisions of Section 212.054, Florida Statutes, and the rules promulgated by the Florida Department of Revenue. The proceeds of the Surtax shall be distributed by the Department of Revenue directly to the County and Municipalities, in accordance with Section 218.62, Florida Statutes.

SECTION FOUR. Referendum Election.

(a) The Surtax imposed in Section Two hereof shall not take effect unless and until approved by a majority of the electors of the County voting in a countywide precinct referendum election on the Surtax.

(b) The Collier County Supervisor of Elections is hereby directed to hold such countywide precinct referendum election on November 6, 2018.

(c) The Collier County Supervisor of Elections shall cause the following proposition to be placed on the ballot:

**COLLIER COUNTY AND MUNICIPAL INFRASTRUCTURE
ONE-CENT SALES SURTAX**

To enhance safety, mobility, and hurricane preparedness in Collier County and its cities by constructing, repairing, and maintaining roads, bridges, signals, sidewalks, parks, evacuation shelters, governmental and emergency services facilities; acquire land and support construction for workforce housing and career and technical training, veterans’ nursing home and expand mental health facilities; shall the County levy a one-cent sales surtax beginning January 1, 2019 and automatically ending December 31, 2025, with oversight by citizen committee?

_____ **FOR THE ONE-CENT SALES TAX**

_____ **AGAINST THE ONE-CENT SALES TAX**

SECTION FIVE. Advertisement and Webpage.

The Collier County Clerk of Court shall insure that notice of this referendum be advertised in accordance with the provisions of Section 100.342, Florida Statutes. Proof of publication shall be provided to the Chair of the Board. Upon adoption of this Ordinance, the County shall create a webpage available to the public on the County's main website which details the proposed projects to be funded by the Surtax, as well as the particulars regarding the imposition and collection of the Surtax.

SECTION SIX. Expiration Date; Survival of Certain Restricted Uses.

(a) *Sunset.* In all events, this Ordinance shall be in effect only through December 31, 2025. It shall sunset and expire thereafter, without further action by the Board and the electors, at which time it shall be deemed repealed and of no further force and effect, and the Surtax levied hereunder shall terminate. Alternatively, this Ordinance shall sunset on December 31st of any year during the term of this Ordinance in the event that the total aggregate distributions of Surtax proceeds equal or exceed the amount of \$490,000,000 at any time during that calendar year, in which event the Board shall take necessary action to repeal this Ordinance and notify the Florida Department of Revenue prior to the applicable deadline so that the Surtax will not continue for the following year.

(b) *Survival of restrictions on use of Surtax proceeds.* Notwithstanding the provisions of subsection (a) for the expiration and repeal of this Ordinance, so long as any Surtax proceeds shall remain unspent, the restrictions hereby imposed concerning the distribution and use of such Surtax proceeds as well as the proceeds of any borrowings payable from Surtax proceeds, and all interest and other investment earnings on either of them shall survive such expiration and repeal and shall be fully enforceable in a court of competent jurisdiction.

SECTION SEVEN. Infrastructure Surtax Citizen Oversight Committee.

(a) *Creation.* Upon the approval of the Surtax by the electors of Collier County, the Board shall hereby assemble an Infrastructure Surtax Citizen Oversight Committee ("Committee") to provide for citizen review of the expenditure of the Surtax proceeds by the County, as soon as

possible after the Surtax becomes effective, but not later than the date on which the funds are first expended. The Committee shall serve as an ad hoc advisory and reporting body to the County.

(b) *Composition.* The Committee shall be comprised of seven (7) members. There shall be one (1) member appointed from each County District, and two (2) at-large members. Upon confirmation that said individuals meet the requirements herein, the Board shall appoint said individuals to this Committee. Appointment of positions, unless otherwise stated herein, shall be governed by Collier County Ordinance No. 2001-55, as may be amended, or by its successor ordinance.

(c) *Membership Qualifications.* All members shall have the following qualifications:

- (1) Member shall be a resident of Collier County;
- (2) Member shall not be an elected official;
- (3) Member shall not be a current employee of any governmental body within Collier County;
- (4) Special consideration shall be given to nominees that have financial or business management backgrounds and experience; and
- (5) Member shall meet the qualifications set forth in Collier County Ordinance No. 2001-55, as may be amended or its successor ordinance.

(d) *Term.* The initial terms for the at-large seats shall be one year; the remainder of the at-large terms shall be for two years or until the Committee sunsets. The initial terms and all terms thereafter for each District seat shall be for two years or until the Committee sunsets. All members shall be eligible for reappointment upon the expiration of their term. Upon resignation or removal of a member from a seat, that seat will be filled for the remainder of its term.

(e) *Removal.* Removal of members from the Committee shall be in accordance with the provisions of Collier County Ordinance No. 2001-55, as it may be amended, or its successor ordinance.

(f) *Sunset.* The Committee shall sunset and terminate without further action by the Board within 2 months of the final expenditure of all of the Surtax proceeds collected by the County. At its final meeting after the Surtax proceeds have been expended, the Committee shall prepare a final report to the Board with its findings and recommendations.

(g) *Duties.* The Committee shall have the responsibility to review the expenditure of Surtax proceeds against the ballot referendum approved by the voters and this Ordinance. The Board may expend proceeds of the Surtax on projects not specifically stated herein or in the attached Exhibit A, so long as those projects (1) comply with the intent of the ballot language, (2) have a positive recommendation by this Committee, and (3) fall within the projects and categories identified. The Committee shall not recommend alternative projects, unless requested by the Board.

(h) *Officer; Meetings; Quorum; Rules of Procedure.*

(1) Annually the members of the Committee shall elect a chairperson and vice chairperson from among the members. The chairperson's and vice chairperson's terms in such positions shall be for one (1) year with eligibility for re-election by the members of the Committee.

(2) The Committee shall meet monthly, or as otherwise needed to fulfill their duties and responsibilities.

(3) The presence of at least five (5) members shall constitute a quorum of the Committee necessary to take action and transact business. In addition, an affirmative vote of a super majority (majority present plus one) shall be necessary in order to take official action. Furthermore, by simple majority vote, but never with less than 5 members present, the Committee shall adopt rules of procedure for its meetings, and thereafter shall be governed by its procedures, as amended from time to time.

(4) The Committee shall keep a written record of meetings, resolutions, findings and determinations. Copies of all Committee minutes, resolutions, reports and exhibits shall be submitted to the Board. The Committee shall submit an annual report of its findings and recommendations to the Board.

(i) *Reimbursement of Expenses.* Committee members shall receive no compensation for the performance of their duties, but shall be entitled to receive reimbursement for expenses reasonably incurred in the performance of their duties upon prior approval by the Board.

(j) *Duties of the County Manager's Office.* The County Manager's Office will provide such documentation, information, descriptions of procedures, secretarial support and general assistance to the Committee as may be necessary for the Committee to carry out its functions as set forth herein.

(k) The Committee, its members, and all its proceedings shall be governed by and comply with the provisions of the Florida Sunshine Law, Chapter 286, Florida Statutes, the Florida Public Records Law, Chapter 119, Florida Statutes, and the Florida Ethics Code, Chapter 112, Florida Statutes, and all other applicable local or state statutes, ordinances, or rules.

SECTION EIGHT. Conflict and Severability.

In the event this Ordinance conflicts with any other Ordinance of Collier County or other applicable law, the more restrictive shall apply. If any court of competent jurisdiction holds any phrase or portion of this Ordinance invalid or unconstitutional, such portion shall be deemed a separate, distinct and independent provision and such holding shall not affect the validity of the remaining portion.

SECTION NINE. Inclusion in The Code of Laws and Ordinances.

The provisions of this Ordinance shall become and be made a part of the Code of Laws and Ordinances of Collier County, Florida. The sections of the Ordinance may be renumbered or re-lettered to accomplish such, and the word "ordinance" may be changed to "section," "article," or any other appropriate word.

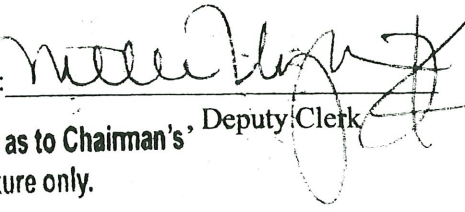
SECTION TEN. Effective Date.

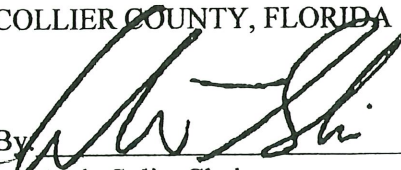
This Ordinance shall be effective upon filing with the Florida Department of State.


PASSED AND DULY ADOPTED by the Board of County Commissioners of Collier County, Florida, this 24th day of April, 2018.

ATTEST:
DWIGHT E. BROCK, Clerk

BOARD OF COUNTY COMMISSIONERS
COLLIER COUNTY, FLORIDA

By: 
Attest as to Chairman's
signature only.

By: 
Andy Solis, Chairman

Approved as to form and legality:

Jeffrey A. Klazkow, County Attorney

Attachment: Ordinance No 2018-21 last page rotated (7951 : Review of Responsibilities and Mission)

Local Government Infrastructure Surtax

Section 212.055(2), Florida Statutes

Summary:

The Local Government Infrastructure Surtax may be levied at the rate of 0.5 or 1 percent pursuant to an ordinance enacted by a majority vote of the county's governing body and approved by voters in a countywide referendum. Generally, the proceeds must be expended to finance, plan, and construct infrastructure; acquire land for public recreation, conservation, or protection of natural resources; or finance the closure of local government-owned solid waste landfills that have been closed or are required to be closed by order of the Department of Environmental Protection (DEP). Additional spending authority exists for select counties. During the 2018-19 local fiscal year, the 25 counties levying this surtax will realize an estimated \$1.58 billion in revenue. The 20 eligible counties not currently levying this surtax at the maximum rate will allow an estimated \$2.15 billion to go unrealized.

General Law Amendments:

Chapter 2018-118, L.O.F., (CS/HB 7087) amends the definition of infrastructure to clarify that public facilities also includes facilities that are necessary to carry out governmental purposes, including, but not limited to, fire stations, general governmental office buildings, and animal shelters. Additionally, the legislation amends the definition of infrastructure to include instructional technology used solely in a school district's classrooms. Instructional technology is defined as an interactive device that assists a teacher in instructing a class or group of students. The hardware and software necessary to operate the interactive device and support systems in which an interactive device may mount are also included as authorized expenditures. These changes became effective on July 1, 2018.

Authorization to Levy:

Local governments may levy this surtax at a rate of 0.5 or 1 percent pursuant to an ordinance enacted by a majority of the members of the county's governing body and approved by the voters in a countywide referendum. In lieu of action by the county's governing body, municipalities representing a majority of the county's population may initiate the surtax through the adoption of uniform resolutions calling for a countywide referendum on the issue. If the proposal to levy the surtax is approved by a majority of the electors, the levy takes effect.

Additionally, the surtax may not be levied beyond the time established in the ordinance if the surtax was levied pursuant to a referendum held before July 1, 1993. If the pre-July 1, 1993 ordinance did not limit the period of the levy, the surtax may not be levied for more than 15 years. There is no state-mandated limit on the length of levy for those surtax ordinances enacted after July 1, 1993. The levy may only be extended by voter approval in a countywide referendum. This surtax is one of several surtaxes subject to a combined rate limitation. A county cannot levy this surtax and the Small County Surtax, Indigent Care and Trauma Center Surtax, and County Public Hospital Surtax in excess of a combined rate of 1 percent.

Counties Eligible to Levy:

All counties are eligible to levy the surtax.

Distribution of Proceeds:

The surtax proceeds are distributed to the county and its respective municipalities according to one of the following procedures.

Office of Economic and Demographic Research

1. An interlocal agreement approved by county's governing body and the governing bodies of the municipalities representing a majority of the county's municipal population. This agreement may include a school district with the consent of all governing bodies previously mentioned.
2. If there is no interlocal agreement, then the distribution will be based on the Local Government Half-cent Sales Tax formulas provided in s. 218.62, F.S.

Authorized Uses of Proceeds:

The surtax proceeds and any accrued interest are expended by the school district, within the county and municipalities within the county, or, in the case of a negotiated joint county agreement, within another county, for any of the following purposes.

1. To finance, plan, and construct infrastructure.
2. To acquire any interest in land for public recreation, conservation, or protection of natural resources or to prevent or satisfy private property rights claims resulting from limitations imposed by the designation of an area of critical state concern.
3. To provide loans, grants, or rebates to residential or commercial property owners who make energy efficiency improvements to their residential or commercial property, if a local government ordinance authorizing such use is approved by referendum.
4. To finance the closure of county or municipal-owned solid waste landfills that have been closed or are required to be closed by order of the DEP. Any use of the proceeds or interest for purposes of landfill closures before July 1, 1993, is ratified.

The term *energy efficiency improvement* means any energy conservation and efficiency improvement that reduces consumption through conservation or a more efficient use of electricity, natural gas, propane, or other forms of energy on the property, including, but not limited to, air sealing; installation of insulation; installation of energy-efficient heating, cooling, or ventilation systems; installation of solar panels; building modifications to increase the use of daylight or shade; replacement of windows; installation of energy controls or energy recovery systems; installation of electric vehicle charging equipment; installation of systems for natural gas fuel as defined in s. 206.9951, F.S.; and installation of efficient lighting equipment.

The surtax proceeds and any interest may not be used to fund the operational expenses of infrastructure, except that a county that has a population of fewer than 75,000 that is required to close a landfill may use the proceeds or interest for long-term maintenance costs associated with landfill closure. Counties, as defined in s. 125.011, F.S., (i.e., Miami-Dade County) and charter counties may use the proceeds or interest to retire or service indebtedness incurred for bonds issued before July 1, 1987, for infrastructure purposes, and for bonds subsequently issued to refund such bonds. Any use of the proceeds or interest for purposes of retiring or servicing indebtedness incurred for refunding bonds before July 1, 1999, is ratified.

As it relates to the authorized uses of the surtax proceeds and any accrued interest, the term *infrastructure* has the following meanings.

1. Any fixed capital expenditure or fixed capital outlay associated with the construction, reconstruction, or improvement of public facilities that have a life expectancy of 5 or more years, any related land acquisition, land improvement, design, and engineering costs, and all other professional and related costs required to bring the public facilities into service. For this purpose, the term *public facilities*

- means facilities as defined in ss. 163.3164(39),¹ 163.3221(13),² or 189.012(5),³ F.S., and includes facilities that are necessary to carry out governmental purposes, including, but not limited to, fire stations, general governmental office buildings, and animal shelters, regardless of whether the facilities are owned by the local taxing authority or another governmental entity.
2. A fire department vehicle, emergency medical services vehicle, sheriff's office vehicle, police department vehicle, or any other vehicle, and the equipment necessary to outfit the vehicle for its official use or equipment that has a life expectancy of at least 5 years.
 3. Any expenditure for the construction, lease, maintenance, or provision of utilities or security for those court facilities as defined in s. 29.008, F.S.
 4. Any fixed capital expenditure or fixed capital outlay associated with the improvement of private facilities that have a life expectancy of 5 or more years and that the owner agrees to make available for use on a temporary basis as needed by a local government as a public emergency shelter or staging area for emergency response equipment during an emergency officially declared by the state or by the local government under s. 252.38, F.S. These private facility improvements are limited to those necessary to comply with current standards for public emergency evacuation shelters. The private facility's owner must enter into a written contract with the local government providing the improvement funding to make the private facility available to the public for purposes of emergency shelter at no cost to the local government for a minimum of 10 years after the completion of the improvement with the provision that the obligation will transfer to any subsequent owner until the end of the minimum period.
 5. Any land-acquisition expenditure for a residential housing project in which at least 30 percent of the units are affordable to individuals or families whose total annual household income does not exceed 120 percent of the area median income adjusted for household size, if the land is owned by a local government or by a special district that enters into a written agreement with the local government to provide such housing. The local government or special district may enter into a ground lease with a public or private person or entity for nominal or other consideration for the construction of the residential housing project on land acquired pursuant to this provision.
 6. Instructional technology used solely in a school district's classrooms. Pursuant to this provision, the term *instructional technology* means an interactive device that assists a teacher in instructing a class or a group of students and includes the necessary hardware and software to operate the interactive device. The term also includes support systems in which an interactive device may mount and is not required to be affixed to the facilities.

Any local government infrastructure surtax imposed or extended after July 1, 1998, may allocate up to 15 percent of the surtax proceeds for deposit within a county trust fund created for the purpose of funding economic development projects having a general public purpose of improving local economies, including the funding of operational costs and incentives related to economic development. The referendum ballot statement must indicate the intention to make the allocation. School districts, counties, and municipalities may

1. Section 163.3164(39), F.S., defines the term *public facilities* as major capital improvements, including transportation, sanitary sewer, solid waste, drainage, potable water, educational, parks and recreational facilities.

2. Section 163.3221(13), F.S., which defines the term *public facilities* as major capital improvements, including, but not limited to, transportation, sanitary sewer, solid waste, drainage, potable water, educational, parks and recreational, and health systems and facilities.

3. Section 189.012(5), F.S., which defines the term *public facilities* as major capital improvements, including, but not limited to, transportation facilities, sanitary sewer facilities, solid waste facilities, water management and control facilities, potable water facilities, alternative water systems, educational facilities, parks and recreational facilities, health systems and facilities, and, except for spoil disposal by those ports listed in s. 311.09(1), F.S., spoil disposal sites for maintenance dredging in waters of the state.

Office of Economic and Demographic Research

pledge the surtax proceeds for the purpose of servicing new bonded indebtedness. Local governments may use the services of the Division of Bond Finance of the State Board of Administration to issue bonds, and counties and municipalities may join together for the issuance of bonds.

A county with a total population of 50,000 or less on April 1, 1992, or any county designated as an area of critical state concern that imposed the surtax before July 1, 1992, may use the proceeds and accrued interest of the surtax for any public purpose if the county satisfies all of the following criteria.

1. The debt service obligations for any year are met.
2. The county's comprehensive plan has been determined to be in compliance with part II of ch. 163, F.S.
3. The county has adopted an amendment to the surtax ordinance pursuant to the procedure provided in s. 125.66, F.S., authorizing additional uses of the proceeds and accrued interest.

Those counties designated as an area of critical state concern that qualify to use the surtax for any public purpose may use only up to 10 percent of the surtax proceeds for any public purpose other than for authorized infrastructure purposes. A county that was designated as an area of critical state concern for at least 20 consecutive years prior to removal of the designation, and that qualified to use the surtax for any public purpose at the time of the designation's removal, may continue to use up to 10 percent of the surtax proceeds for any public purpose other than for infrastructure purposes for 20 years following the designation's removal. After the 20 year period expires, a county may continue to use up to 10 percent of the surtax proceeds for any public purpose other than for infrastructure if the county adopts an ordinance providing for such continued use of the surtax proceeds.

Likewise, a municipality located within such a county may not use the proceeds and accrued interest for any purpose other than an authorized infrastructure purpose unless the municipality's comprehensive plan has been determined to be in compliance with part II of ch. 163, F.S., and the municipality has adopted an amendment to its surtax ordinance or resolution pursuant to the procedure provided in s. 166.041, F.S., authorizing additional uses of the proceeds and accrued interest. Such municipality may expend the proceeds and accrued interest for any public purpose authorized in the amendment.

Despite any other use restrictions to the contrary, a county, having a population greater than 75,000 in which the taxable value of real property is less than 60 percent of the just value of real property for ad valorem tax purposes for the tax year in which the referendum is placed before voters, and the municipalities within such a county may use the surtax proceeds and accrued interest for operation and maintenance of parks and recreation programs and facilities established with the proceeds throughout the duration of the levy or while accrued interest earnings are available for such use, whichever period is longer.

Attorney General Opinions:

Florida's Attorney General has issued the following legal opinions relevant to this revenue source.

<u>Opinion #</u>	<u>Subject</u>
2016-02	Infrastructure surtax, emergency generators
2012-19	Infrastructure surtax, beach erosion projects/studies
2009-28	Counties, use of infrastructure surtax monies
2007-51	Municipalities, use of infrastructure surtax monies
2003-17	Infrastructure surtax use to purchase computer system

2001-45	Local government infrastructure surtax, health care
2000-06	Expenditure of infrastructure surtax revenues
99-24	Capital improvements to property leased by county
95-73	Counties, infrastructure surtax used to fund engineers
95-71	Tourist development tax / infrastructure surtax
94-79	Uses of local government infrastructure surtax
94-46	Vehicles purchased with proceeds of sales surtax
93-92	Local government infrastructure surtax, purchase of vehicle
92-81	Discretionary local option infrastructure sales surtax
92-08	Local government infrastructure surtax proceeds
90-96	Infrastructure surtax proceeds, payment of debt
88-59	Use of discretionary surtax for construction

The full texts of these opinions are available via a searchable on-line database.⁴ Local government officials seeking more clarification should review the opinions in their entirety. The reader should keep the date of the opinion in mind when reviewing its relevance to current law or any interpretations that have been articulated in Florida case law.

4. <http://myfloridalegal.com/ago.nsf/Opinions>

For the Harmony at Santa Barbara (McDowell project), please see the following information:

BCC Awarded Invitation to Bid to McDowell Partners to negotiate lease: March 2019

- Lease approved by BCC: August 2019
- 10 months until PUDA submitted (from approval)
- 13 months until SDP submitted (from approval)

Planned Unit Development Amendment (allow affordable housing)

- Applied for PUDA: 06/24/2020
 - 1st Review Completed: 07/13/2020 (12 business days with staff)
- 2nd Submittal Received: 08/05/2020 (17 business days with developer)
 - 2nd Review Completed: 08/31/2020 (18 business days with staff)
- 3rd Submittal Received: 12/15/2020 (74 business days with developer)
 - 3rd Review Completed / Hearing Scheduled: 12/15/2020 (0 business days with staff)

*With Staff: 30 business days / With Developer: 91 business days

Harmony at Santa Barbara (SDP)

- Applied for SDP: 09/02/20
 - 1st Review Completed: 09/24/2020 (15 business days with staff)
- 2nd Submittal Received: 12/08/2020 (49 business days with developer)
 - 2nd Review Completed: 12/18/2020 (8 business days with staff)
- 3rd Submittal Received: 01/25/2021 (22 business days with developer)
 - 3rd Review Completed: 02/05/2021 (9 business days with staff)
- 4th Submittal Received: 03/23/2021 (31 business days with developer)
 - 4th Review Completed/Approval Issued: 04/01/2021 (7 business days with staff)
- Pre-Construction Meeting Requested: 10/13/2021 (136 business days with developer)

*With Staff: 39 business days / With Developer: 238 business days

EKOS on COLLIER

6360 Collier Blvd.



Request for Support



McDowell Housing Partners – Multi-Family Developer

- **Mission:** Create and preserve high-quality housing communities that provide America's workforce and seniors with a safe and sustainable place to call home, while implementing high-value resident services and programs to ensure tenant satisfaction.
- **Structure:** Vertically integrated team of finance, construction, project management, accounting and asset management staff in house.
- **Expertise:** Proven success utilizing intricate financing products and methods:
 - FHA-insured mortgages (221(d)(4) and 223(f) loans, Tax-Exempt Private Activity Bonds, HOME Investment Partnership loans, Affordable Housing Partnership loan (AHP), Florida's State Apartment Incentive Loan program (SAIL), Community Development Block Grants (CDBG), Tax-increment Financing (TIF), and numerous local funding programs.
- **Commitment:** MHP commits to unwaveringly pursue all sources of funding available to complete the development of a new housing community that we pursue.

Current Projects in Collier County

Harmony on Santa Barbara - 82 Units Family Workforce

- 4% Tax Credits and CBDG
- Under Construction – Expected Completion January 2023

Allegro at Hacienda Lakes – 160 Units Elderly 62+

- 4% Tax Credits and SAIL
- Under Construction – Expected Completion May 2023

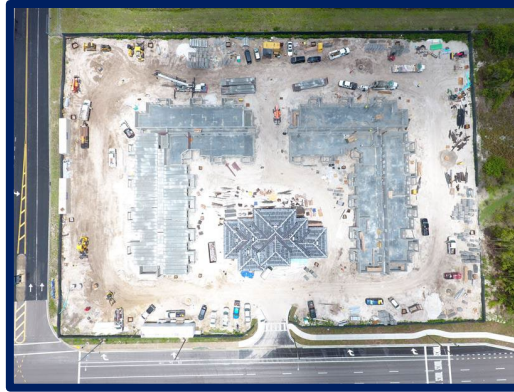
Cadenza at Hacienda Lakes – 160 Units Elderly 62+

- 4% Tax Credits and SAIL
- Pre- Construction - Expected Completion October 2024

HARMONY RENDERING



Progress Photos



ALLEGRO+ CADENZA RENDERING



Progress Photos



Proposed Development

108 units on 7.76 Acres (13.97 units/acre)

Product: 3-story garden walk-up buildings plus a stand-alone clubhouse, surface parking, and ample amenities

Unit Types and Mix

- 54 - One-bedroom/one-bathroom units
- 32 - Two-bedroom/two-bathroom units
- 12 - Three-bedroom/two-bathroom units

Certified under a Green-Building program such as LEED or the ICC 700 National Green Building Standard.

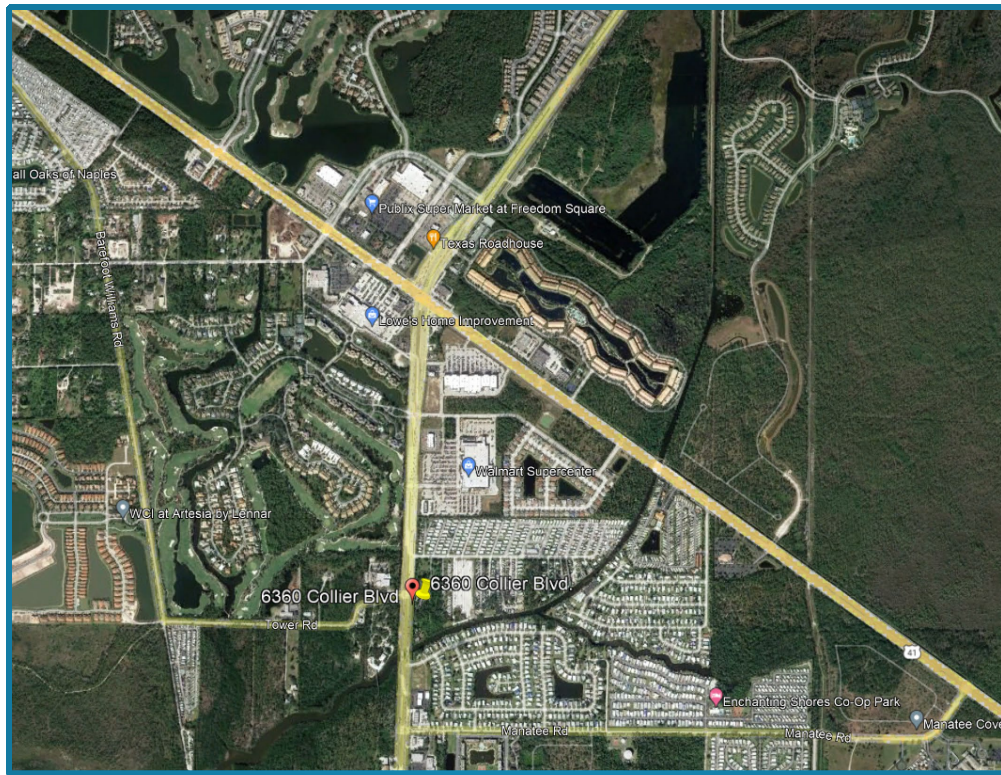
Income/Rent Restrictions: Mix of incomes at and under 80% of the Area Median Income (set annually by HUD)

- 2022 Rents (30% - 80% MFI):
 - 1 Beds – \$561 to \$1,416
 - 2 Beds – \$636 to \$1,695
 - 3 Beds - \$735 to \$1,962

Aerial Map

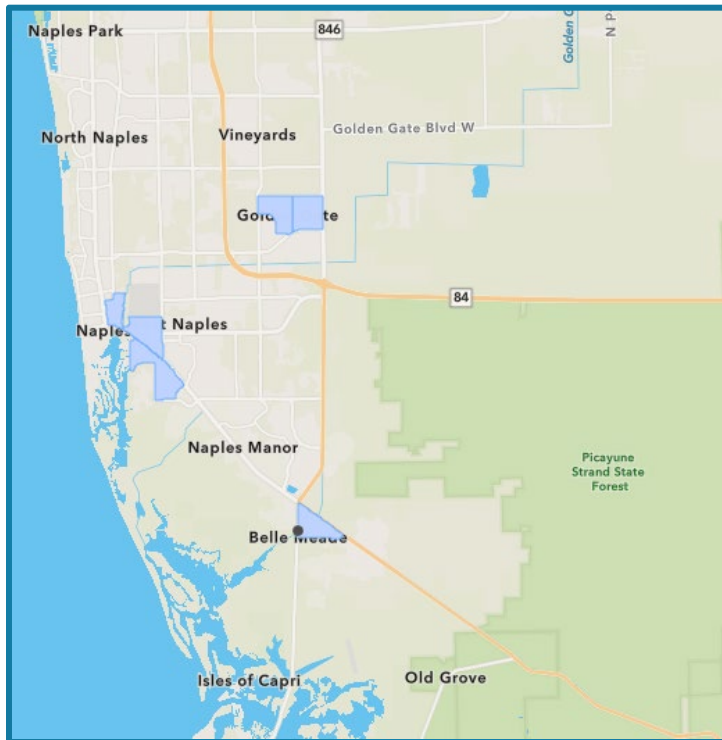


Aerial Map

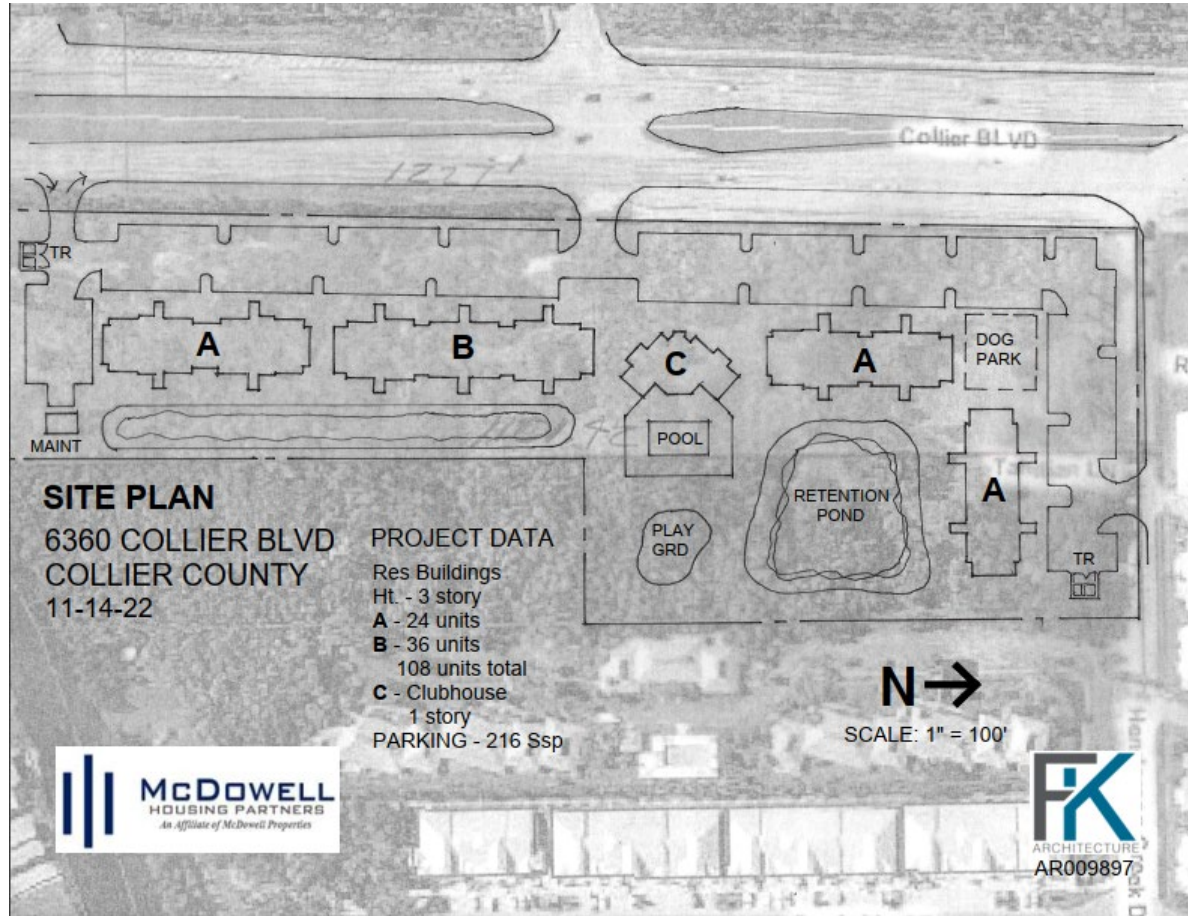


QCT and SADDA MAPS

- Limited QCT and SADDA Availability



Concept Site Plan



Amenities

Clubhouse with community gathering areas, fitness center, tot-lot, computer lab and resort-style swimming pool



Project Request

SURTAX FUNDING REQUESTED AMOUNT- \$3,750,000

SURTAX FUNDING GOALS

- Purchase land that can be reserved for housing that is affordable through extended County ownership
- Acquire land for housing that is affordable
- Long term affordability of Collier's housing stock
- Promote economic development by increasing affordable housing options for the area's workforce

PROJECT FEATURES

- Hold land in perpetuity (99-year lease) for the development and preservation of the stock of housing that is affordable
- Incentivize the construction of homes/rentals that are affordable on County owned properties
- Increase the availability or quality of housing for the elderly or persons with disabilities
- Use restrictions that ensure that properties will remain affordable for the long term

Current Zoning

Location: 6360 Collier Blvd., Naples, FL 34114

Number of Acres: 7.76 acres

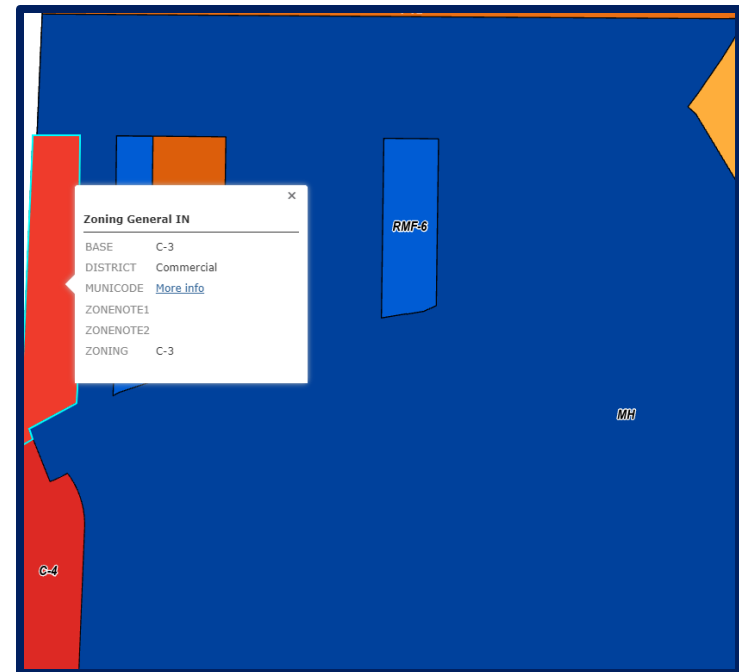
Zoning: C-3 and MH

Proposed Units: 108 units – Family Workforce

Four, 3-story apartment buildings, with standalone clubhouse and surface parking.

Amenities

Pool and hardscaped deck, fitness center, cyber lounge/media room, and picnic area.



An Overview on H.B. 1339

Full Title: *Community Affairs; Authorizing a board of county commissioners to approve development of AH on any parcel zoned for residential, commercial, or industrial use; amending the Florida Interlocal Cooperation Act of 1969 to authorize private entities to enter into specified loan agreements; revising the information required to be annually submitted by municipal budget officers to the Office of Economic & Demographic Research; renaming the Community Workforce Housing Innovation Pilot Program as the Community Workforce Housing Loan Program to provide workforce housing for persons affected by the high cost of housing, etc.*

- **A.K.A., the “Community Affairs” bill**

Effective Date: 7/1/2020

Bipartisan Support:

- The House bill - and its counterpart in the Senate - were introduced by a team of two Democrats and three Republicans
- The votes in favor came from each side of the political spectrum:
 - **House:** 101-10
 - **Senate:** 39-0

The bill addresses several issues affecting: **(1)** Development Zoning; **(2)** Bonding Activities; **(3)** Impact Fees; **(4)** Building Inspections; **(5)** Affordable Housing; & **(6)** The regulation, ownership, & tenancy related to mobile homes, mobile home parks, & related homeowners’ associations.

In Summary: How to use this tool Locally

Your municipality does not have to rezone for land for affordable housing developments.

Your municipality can utilize HB 1339 which allows local governments the right to provide affordable housing (up to 120% AMI) on land that is zoned Commercial, Residential, Agricultural and Industrial.

Your municipality can gain controls over other aspects of the affordable housing development such as:

- Unit Count
- Unit Mix
- Demographic: Family or Elderly
- Architectural Design
- Rent and Income Limits

This can be accomplished through:

- Development Agreements
- Proposed Site Plan



Contact

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|

6360 Collier Blvd Naples FL

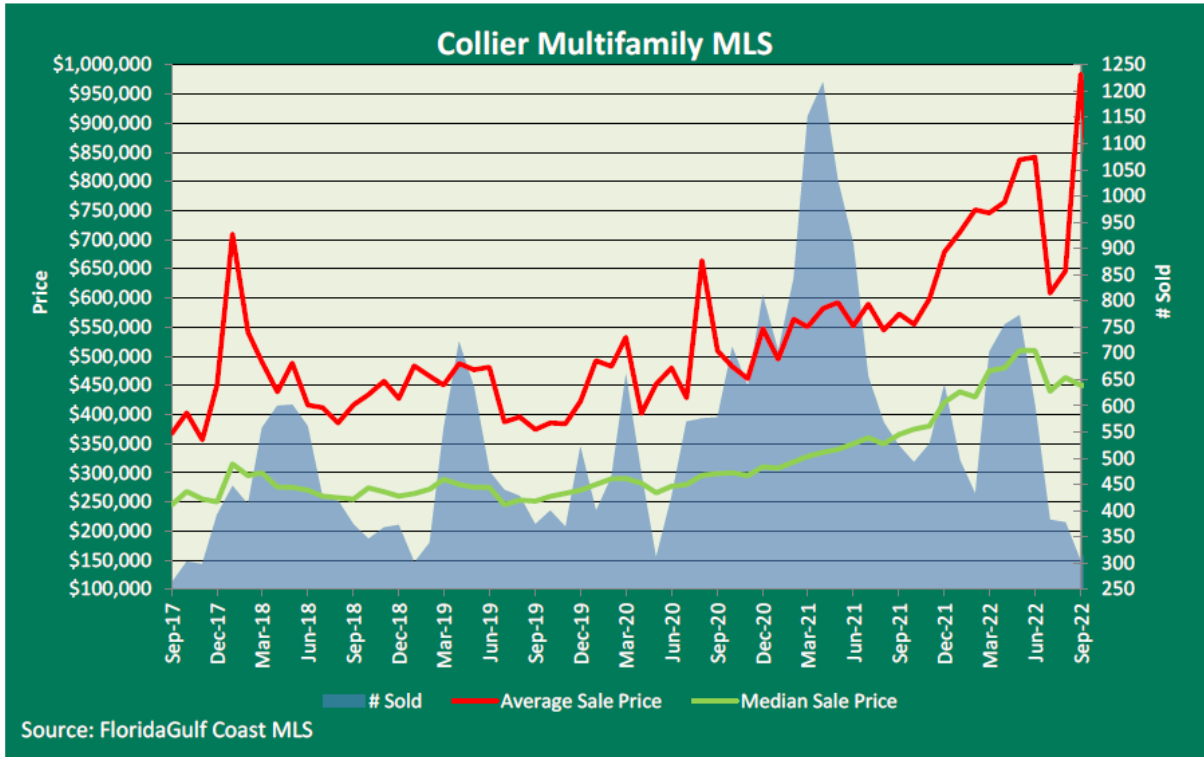
7.43ac

PROPOSED SURTAX FUNDING PROJECT



(2) parcels 1.92 acres & 5.51 acres 7.43 +/-

The scope of the valuation assignment is to value the subject property for family workforce housing. The subject property will be valued on a per unit cost basis.



The tables below rank the top communities and builders for Collier County by building permit issuance for new single-family attached homes over the past 12 months ending on September 30, 2022.

Rank	Community	SFA Permits
1	Orange Blossom Ranch	152
2	Enbrook	112
3	Isles of Collier Preserve	94
4	Soluna	92
5	Abaco Point	55
6	Azure at Hacienda Lakes	35
7	Vanderbilt Reserve	24
8	Bellerawalk/Del Webb Ave Maria	21
9	Sonoma Oaks	21
10	Bella Torso / Fiddlers Creek	20
11	Hamilton Place	13
12	Jasper Way	12
3Q2022		

Rank	Builder	SFA Permits
1	DR Horton	204
2	Lennar	152
3	Toll Brothers	114
4	Minto	94
5	Pulte	46
6	Sobel	24
7	Taylor Morrison	20
8	Krehling, Inc.	8
3Q2022		

00725640004 6360 Collier Blvd 5.51ac & 00725040002 894 Henderson Creek Dr. 1.92ac

Comparable's similar to the subject property intended use.

Enbrook PUD \$2,181,523 approved 265 units, results cost \$8,232 per unit.

Manatee Cove PUD \$3,675,000 approved 225 units, results cost \$16,333 per unit.

Jasper Flats Villa's \$2,275,000 approved 54 units, results cost \$42,130 per unit.

Cope & County Barn \$2,200,000 approved 42 lots, results cost \$52,380 per unit

The average of this data is \$30,000 per unit.

Subject property proposed units 108 and Funding Request \$3,750,000.

- Estimated market value via developable units \$30,000 each x 108 units equals \$3,240,000.
- Estimated market value via closed sales 7.43ac or 323,650sf x 11.00sf equals \$3,560,150 say \$3,560,000.

Current Status of Plan Recommendations

Regulation and Governance	Increase, Maintain, or Restore Supply	Enhance Transportation Options	Increase Wages	Communication and Engagement
7 member BCC	Increase Density in AHDB program	Bus routes near aff. development	Government wages	YIMBY and Volunteer Projects
Simple Majority for AH Zoning	Mixed Income Hsg with flexibility options	Park and Ride System	Minimum wage	Directory of affordable housing for developers
Increase Density at Strategic Sites	Rental of guest houses / ADU	Bus Rapid transit or express routes		Myths and Facts Brochure
Increase Admin Approvals / Regulatory Relief	Commercial by Transp, Jobs; Incr. density	Implement Pathways Plan		Marketing and Communication Plan
Expedite Dev. Review and Permitting	Community Land Trust	Promote Ride Sharing Options		Hire Community Outreach Coord
Reduce regs to reduce cost	Use Publicly owned land	Secure revenue source for transit		Streamline application process
Adopt SMART code (LDC)	Reduce or waive impact fees			Directory of affordable housing for consumers
Reinstate Housing Trust Fund				Dev Housing Education Program
Dedicated Funding Source				Housing Resources Guide
Adopt New Definition and Methodology				Hire Housing Counselor
Commercial to Residential Conversions				Community Vision

THE PANEL IS IMPRESSED WITH the planning and study that has already been completed regarding housing affordability in Collier County. The panel's recommendations reflect and endorse much of the work that has already been completed. However, what is abundantly clear to the panel is that action and implementation are crucial to creating sustainable solutions. Implementation of the panel's recommendations will require sincere action, tremendous political will, and strong leadership.

Reality Check

- ▶ This is a long range plan
- ▶ Many items can be implemented within one year, some longer
- ▶ Funds may not be available for two or more years

Growth Implications

In a county expected to grow significantly in population by 2040, what does that finding mean for the future? The county is expected to add 58,000 households over the next 23 years. If the local issue of cost burden is not addressed, then—at a minimum—11,000 more households will experience severe cost burden (above 50 percent) than do households today. Given ever-rising real estate values and a seemingly bottomless demand for higher-end homes and rentals, the likelihood of both the number and percentage of cost-burdened households increasing is high.

Implementation of Community Housing Plan- Accepted 10/25/17

5

Approved 12/12/17

1. Move forward with RFI Process on 2 County-Owned sites (approved 5/0) ✓

Approved 2/27/18

1. Adopt New Definition of Affordable Housing (approved 5/0) ✓
2. Adopt new Housing Demand Methodology (approved 4/1, Fiala opp.) ✓
3. Advocate for full funding of the Sadowski Housing Trust Fund for SHIP and other housing funding (approved 5/0) ✓
4. Adopt a policy to address housing that is affordable in future public land acquisitions. (approved 5/0) ✓
5. Amend the Affordable Housing Density Bonus (AHDB) program (approved 4/1, Fiala opp.) ✓
6. Create a concurrent zoning review/approval process (approved 4/1, Fiala opp.) ✓

Housing Plan Implementation Items (cont):

Approved 4-24-18

1. Amendments to the Code of Laws and Ordinances related to Impact Fee Deferrals; ✓
2. Supersede/Establish a new Local Housing Trust Fund; ✓
3. Initiate the process to establish a Community Land Trust; ✓
- ~~4. Initiate a nexus study to determine appropriate linkage fees;~~
5. Develop a housing that is affordable marketing, public relations, and communications plan. ✓

Housing Plan Implementation Items (cont):

Approved 10-9-18



~~1. Direct staff to advertise Mixed Income Housing Ordinance~~

2. Provide administrative approvals of certain affordable housing applications (including senior housing) ✓
3. Develop a streamlined process for commercial to residential conversions ✓
4. Develop guidelines to incentivize mixed income residential housing in future and redeveloped activity centers (reduced transportation impact fees, increased densities...) ✓
5. Develop a process to allow for increased density in Strategic Opportunity Sites ✓
6. Provide an increase in density in the Community Redevelopment Agency (CRA) areas and along transit corridors ✓

LDC Implementation Delayed

Housing Plan Implementation Items (cont):

- ▶ One Cent Sales Sur-Tax ✓
 - ▶ 11-6-18: Collier Voters approve one-cent sales sur-tax earmarked to raise \$20 Million for land acquisition for Housing that is Affordable
- ▶ Bembridge PUD – Use of County Owned Land ✓
 - ▶ 11-13-18: BCC Unanimously directs staff to prepare and release an Invitation to Negotiate for developers to build housing that is affordable in the Bembridge site
- ▶ Outreach, Marketing & Education ✓
 - ▶ 10-8-19: BCC approves contract to initiate “Housing That is Affordable” Marketing Plan, including YIMBY (YES in my back yard)

Housing Plan Implementation Items (cont):

- ▶ Bembridge PUD – Use of County Owned Land ✓
 - ▶ 10-22-19: BCC Unanimously Awards Developer Agreement to McDowell Housing Partners for 78 unit rental apartment complex with 10% set-aside for seniors, specials needs, & veterans.
- ▶ Community Land Trust ✓
 - ▶ 10-22-19: BCC contract to H.E.L.P. for the creation of a non-profit Community Land Trust.
- ▶ Local Housing Trust Fund ✓
 - ▶ 10-22-19: BCC Approves Guidelines and Work Plan for application/award of Local Housing Trust Fund allocations.